

**Priority:** Accountability  
**Program Offer Type:** Internal Service  
**Related Programs:**

**Lead Agency:** County Management  
**Program Contact:** Dwight Wallis

**Program Characteristics:**

**Executive Summary**

Records Management supports County agencies and the public in maintaining public records in accordance with operational, legal, fiscal, and public access needs.

**Program Description**

Records Management supports County programs in meeting public records requirements by developing and maintaining retention schedules for all County departments in a manner that meets legal requirements and departmental operational needs while lowering costs; maintaining over 116 million documents in a centralized Records Center; maintaining the County's historic archives back to 1855; recycling large volumes (46 tons in FY08) of public records in a manner that ensures confidentiality while supporting sustainability goals; serving as health information Privacy Officer; and providing training and consultation on electronic records keeping, document conversion, agency moves, complex public reference and referral questions, records preservation, and records management best practices.

**Program Justification**

Records Management supports Accountability's primary factor of Resource Management through the strategy of helping to ensure that the County "manages its resources and service delivery costs effectively". It maintains retention schedules to effectively control records volume. In FY08 the program accessioned a record 6777 boxes (a 40% increase over the previous year), in part to facilitate the Department of Health's transition to the Epic system, yet continued to maintain Records Center services for all county agencies through effective retention management. The continued availability of this low cost storage reduced file storage needs in expensive office space by over 49,000 square feet. The program provides extensive web tools, training, and regular consultation to communicate to employees their public records obligations. It removes barriers to public access through archival preservation processing, reference assistance, and electronic records preservation. And, it promotes public awareness of our rich cultural heritage through such efforts as the archival display case maintained in the lobby of the Multnomah Building.

**Performance Measures**

Measure Type	Primary Measure	Previous Year Actual (FY07-08)	Current Year Purchased (FY08-09)	Current Year Estimate (FY08-09)	Next Year Offer (FY09-10)
Output	Retrievals, Refiles and Interfiles (Record Actions) Performed	17,217	16,000	16,000	15,200
Outcome	% of Current Retention Schedules (Updated within the last 5 years)	78.0%	90.0%	88.0%	90.0%
Output	Boxes, Microfilm Rolls, Maps and Plans Maintained in the Records Center	92,790	93,000	95,000	95,500
Quality	% of Records Retrievals Delivered to Customer Within 1 Business Day	99.0%	98.0%	98.0%	98.0%

**Performance Measure - Description**

## Legal/Contractual Obligation

ORS 192 and OAR 166 outline public records mandates for Records Officer, microfilm, imaging, storage, retention, and access. 45 CFR 164.530(a) mandates Health Insurance Portability and Accountability Act (HIPAA) Privacy Officer, responsible for the privacy of personal health information (PHI). Executive Rule 301 assigns retention schedule function to program.

## Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2009	2009	2010	2010
Personnel	\$0	\$341,250	\$0	\$348,765
Contracts	\$0	\$17,000	\$0	\$18,700
Materials & Supplies	\$0	\$24,091	\$0	\$20,736
Internal Services	\$0	\$349,137	\$0	\$345,410
Unappropriated & Contingency	\$0	\$47,263	\$0	\$0
Subtotal: Direct Exps:	<b>\$0</b>	<b>\$778,741</b>	<b>\$0</b>	<b>\$733,611</b>
Administration	\$10,500	\$30,742	\$9,034	\$33,724
Program Support	\$9,751	\$0	\$8,464	\$0
Subtotal: Other Exps:	<b>\$20,251</b>	<b>\$30,742</b>	<b>\$17,498</b>	<b>\$33,724</b>
Total GF/non-GF:	<b>\$20,251</b>	<b>\$809,483</b>	<b>\$17,498</b>	<b>\$767,335</b>
Program Total:	<b>\$829,734</b>		<b>\$784,833</b>	
Program FTE	0.00	4.00	0.00	4.00
<b>Program Revenues</b>				
Fees, Permits & Charges	\$0	\$741,034	\$0	\$814,848
Intergovernmental	\$0	\$7,742	\$0	\$9,800
Other / Miscellaneous	\$0	\$42,279	\$0	\$64,385
Program Revenue for Admin	\$0	\$0	\$0	\$0
<b>Total Revenue:</b>	<b>\$0</b>	<b>\$791,055</b>	<b>\$0</b>	<b>\$889,033</b>

## Explanation of Revenues

Records Management is funded by an allocation system through the Distribution Fund. Total program costs for FY09 are allocated based on each department's share of the number of boxes stored, boxes brought into the Records Center, and record actions performed in FY07.

## Significant Program Changes

Last year this program was:  
#72101 - DCM - Records Section