

Lead Agency: County Management

Program Contact: Dwight Wallis

Program Offer Type: Internal Service

Related Programs:

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 departments in a manner that meets legal and operational requirements while lowering costs; maintaining over 121 million documents in a centralized Records Center; maintaining the County's historic archives back to 1855; recycling large volumes (60 tons in FY09) 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.

Records Management works with departments and agencies to ensure that the County manages its resources and service delivery costs effectively. The program maintains retention schedules on over 1700 record series to control records volume, allowing for the continued accessioning of large volumes of records into the Records Center, taking in 6682 boxes of records in FY09. The continued availability of this low cost space reduced file storage needs in expensive office space by over 51,000 square feet. The program provides extensive web tools, training, and consultation to communicate to employees their public records obligations. It has been helping to facilitate the District Attorney's Office imaging project, as well as SAP's archiving project. In FY09 the program acquired the Sheriff's Office's extensive archives, a resource it has made available to researchers through archival processing, as well as the public through its archival display case in the Multnomah Building.

Performance Measures

Measure Type	Primary Measure	Previous Year Actual (FY08-09)	Current Year Purchased (FY09-10)	Current Year Estimate (FY09-10)	Next Year Offer (FY10-11)
Output	Retrievals, Refiles and Interfiles (Record Actions) Performed	14,358	15,200	14,000	13,500
Outcome	% of Current Retention Schedules (Updated within the last 5 years)	88.0%	90.0%	78.0%	80.0%
Output	Boxes, Microfilm Rolls, Maps and Plans Maintained in the Records Center	96,413	95,500	99,500	99,000
Quality	% of Records Retrievals Delivered to Customer Within 1 Business Day	98.0%	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 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	2010	2010	2011	2011
Personnel	\$0	\$348,765	\$0	\$403,322
Contracts	\$0	\$18,700	\$0	\$29,074
Materials & Supplies	\$0	\$20,736	\$0	\$31,271
Internal Services	\$0	\$345,410	\$0	\$350,226
Unappropriated & Contingency	\$0	\$0	\$0	\$34,799
Total GF/non-GF:	\$0	\$733,611	\$0	\$848,692
Program Total:	\$733,611		\$848,692	
Program FTE	0.00	3.00	0.00	3.40
Program Revenues				
Fees, Permits & Charges	\$0	\$814,848	\$0	\$715,817
Intergovernmental	\$0	\$9,800	\$0	\$0
Other / Miscellaneous	\$0	\$64,385	\$0	\$132,875
Total Revenue:	\$0	\$889,033	\$0	\$848,692

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 (accessioned), and record actions performed in FY09.

Significant Program Changes

✔ Significantly Changed

Last year this program was:

The program is increasingly being consulted on a variety of issues related to the county's transition to electronic records keeping, including compliance and maintenance issues, and is strained in providing sustained support in this area. This program offer includes \$86,602 in support of a limited duration Program Development Specialist, to provide a more focused effort in addressing issues relating to email management and use, e-archiving of legacy data, active electronic file maintenance and records taxonomy development, system conversion to electronic records and related business process analysis, and analysis of records related technologies.