

**Lead Agency:** Department of County

**Program Contact:** Dwight Wallis

**Program Offer Type:** Internal Service

**Related Programs:**

**Program Characteristics:** Climate Action Plan

**Executive Summary**

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

**Program Description**

The program supports cost reduction and compliance with public records regulations by developing and implementing policies for the orderly maintenance and disposition of county records generated by all departments. Addressing a wide variety of formats, the program maintains over 112 million documents in a centralized Records Center, including the County's historic archives dating back to 1855. Storage of these records reduced the need for office space storage by over 50,000 square feet in FY11. The program also recycles large volumes of public records (68 tons in FY11) in a sustainable manner that ensures confidentiality.

The program provides consultation in the establishment and organization of electronic records keeping; enterprise document conversion; retention scheduling; archival research, access and preservation; essential records protection, and records management best practices. Archival research activities increased by 22% in FY11, and are expected to continue to grow as the program implements Archon, a web-based archival research tool and content management system. The program is providing electronic records management training courses aimed at helping employees manage common e-records created and managed on their desktops or shared drives. Additionally, program staff are helping the DCA Hub organize active electronic records. The Records Management Program manages a wide variety of technologies, from continuing to refine a growing digital repository to managing microfilm. The program recently completing an extended project to preserve the Recording Office's Book of Records microfilm dating back to 1962, shipping 4,763 rolls of security microfilm to the State Archives in 2011 for secure storage. The program has also begun working with the Office of Emergency Management to address essential records protection throughout the county, utilizing FEMA based standards.

These efforts contribute to the Climate Action Plan activities related to local government operations, item number 18-8, due to the large amount of paper recycling the program does each year, and due to its ongoing consultation with Departments on ways to increase their use of reliable, compliant, and trusted electronic records systems.

**Performance Measures**

Measure Type	Primary Measure	Previous Year Actual (FY10-11)	Current Year Purchased (FY11-12)	Current Year Estimate (FY11-12)	Next Year Offer (FY12-13)
Output	Retrievals, Refiles and Interfiles (Record Actions) Performed	16,458	13,500	14,000	14,000
Outcome	% of Current Retention Schedules (Updated within the last 5 years)	84.0%	85.0%	87.5%	87.5%
Output	Boxes/Digital Objects, Microfilm Rolls, Maps and Plans Maintained in Storage	94,091	93,000	91,000	91,000
Quality	% of Records Retrievals Delivered to Customers Within 1 Business Day	97.0%	98.0%	99.0%	98.0%

**Performance Measure - Description**

## Legal/Contractual Obligation

ORS 192 and OAR 166 outline public records mandates for the Records Officer, microfilm, imaging, storage, retention and access. Executive Rule 301 assigns the retention schedule function to the Records Management program.

## Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
<b>Program Expenses</b>	2012	2012	2013	2013
Personnel	\$0	\$406,945	\$0	\$364,905
Contracts	\$0	\$22,500	\$0	\$32,000
Materials & Supplies	\$0	\$31,977	\$0	\$31,536
Internal Services	\$0	\$393,880	\$0	\$455,878
Unappropriated & Contingency	\$0	\$45,016	\$0	\$44,216
<b>Total GF/non-GF:</b>	<b>\$0</b>	<b>\$900,318</b>	<b>\$0</b>	<b>\$928,535</b>
<b>Program Total:</b>	<b>\$900,318</b>		<b>\$928,535</b>	
Program FTE	0.00	3.40	0.00	4.00
<b>Program Revenues</b>				
Fees, Permits & Charges	\$0	\$715,817	\$0	\$840,818
Other / Miscellaneous	\$0	\$184,501	\$0	\$87,717
<b>Total Revenue:</b>	<b>\$0</b>	<b>\$900,318</b>	<b>\$0</b>	<b>\$928,535</b>

## Explanation of Revenues

Records Management is funded by an allocation system through the Distribution Fund. Total program costs 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 FY11.

## Significant Program Changes

✔ Significantly Changed

### Last year this program was:

To address span of control issues, and, at the same time continue to transition the program to an electronic records environment, 40% of the Records Administrator is assigned to managing Distribution Services. This, and the conversion of the program's dedicated STAR server to a virtual server allows for the conversion of the program's Electronic Records Management Analyst to a permanent position with minimal impact on program rates.