Program # 78033 - Records Management	Version 6/14/2013 s

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

Program Offer Type: Internal Service

Related Programs:

Program Characteristics:

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 111 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 49,000 square feet in FY12.

The program also recycles large volumes of public records (50 tons in FY12) 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.

The program continues to expand its web presence with the Archon web tool and external web site, resulting in a 53% increase in reference and referral activities in FY12. Significant progress has been made in managing electronic records through the establishment of a county electronic records repository, and through increasing e-records training and consultation. In conjunction with the State Archives, the program is pursuing the county's first fully functional electronic records management system, utilizing cloud technology to substantially lower start up costs. This is intended to replace the program's current antiquated system, and allow for management of both active and inactive records thoughout the county, regardless of format.

The program continues to work with the Office of Emergency Management to address essential records protection county-wide, 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 (FY11-12)	Current Year Purchased (FY12-13)	Current Year Estimate (FY12-13)	Next Year Offer (FY13-14)
Output	Retrieval, Refiles, and Interfiles (Record Actions) performed	14,464	14,000	13,500	13,000
Outcome	% of Archival Holdings Described On-Line	0.0%	0.0%	39.0%	59.0%
Output	Boxes/Digital Objects, Microfilm Rolls, Maps and Plans Maintained in Storage	90,456	91,000	90,000	89,000
Quality	% of Records Retrievals Delivered to Customers within 1 Business Day	97.0%	98.0%	92.0%	91.0%

Performance Measure - Description   ✔ Measure Changed

Discontinued use of retention schedule outcome measure, due to changes in retention scheduling practices which made measure obsolete.

New archival measure reflects the percentage of archival collections processed and described to a point which allows for public access and usage.

Reduction in records retrieval measure due to changes in shared position utilized in providing service.

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
Program Expenses	2013	2013	2014	2014
Personnel	$0	$364,905	$0	$382,148
Contracts	$0	$32,000	$0	$32,757
Materials & Supplies	$0	$31,536	$0	$25,365
Internal Services	$0	$455,878	$0	$423,887
Unappropriated & Contingency	$0	$44,216	$0	$0
Total GF/non-GF:	**$0**	**$928,535**	**$0**	**$864,157**
Program Total:	**$928,535**		**$864,157**	
Program FTE	0.00	4.00	0.00	3.60
Program Revenues				
Fees, Permits & Charges	$0	$840,818	$0	$864,157
Other / Miscellaneous	$0	$87,717	$0	$0
Total Revenue:	**$0**	**$928,535**	**$0**	**$864,157**

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 FY12.

Significant Program Changes

Last year this program was: #78018, Records Section