Multnomah County				
Program #78404 - Reco	rds Management			2/18/2016
Department:	County Assets	Program Contact:	Garret Vanderzander	า
Program Offer Type:	Internal Service	Program Offer Stage:	As Requested	
Related Programs:				
Program Characteristic	s: In Target			

Executive Summary

The Records Management Program provides a full suite of records services, managing and safeguarding the information assets of the county through identification, classification, appraisal, storage, tracking, digital preservation planning, and confidential destruction.

Program Summary

Records Management is the professional practice of managing records throughout their life cycle, a series of discrete phases that carries a record from creation to destruction. This work includes identifying, classifying, appraising, storing, securing, preserving, retrieving, tracking, and disposing of county records in accordance with state and federal retention and privacy regulations and industry best practices. The program provides a full suite of records services, including planning for the management and safeguarding of the information assets of the county, regardless of digital or analog format, in compliance with Oregon Administrative Rule 166-030-0016. The program is staffed by three professional records managers/archivists and two Records Administration Assistants. The Records Officer serves the state-mandated role, also functioning as the lead worker.

The primarily functions of the program include, but are not limited to:

- Administration of HP Records Manager (HPRM), an electronic document and records management system, including implementation and maintenance of user accounts in other county agencies for use as a system for document management and inactive electronic records storage;

- Records Center services, including storage/retrieval of inactive records and secure destruction of physical records;

- Historic archives development and preservation, including research and reference services for customers within and outside of the county;

- Retention scheduling across all departments, as required by state and federal regulation, and by county code;

- Records management consulting and training;

- and providing the Locating Records service, primarily through the program's public facing website.

These efforts contribute to the Climate Action Plan activities related to local government operations, item 19G, due to ongoing consultation with other programs to enable use of retention- and preservation-compliant electronic records systems.

Performance Measures						
Primary Measure	FY15 Actual	FY16 Purchased	FY16 Estimate	FY17 Offer		
Number of Records Retrievals and Interfiles (Record Actions) Performed on Behalf of Customers	7,103	10,000	5,000	5,000		
Percentage Increase of Reference and Referral Requests Compared to Previous Fiscal Year	36.2%	50.0%	0.0%	30.0%		
Cubic Feet of Boxes, Microfilm Rolls, Maps and Plans Maintained in Records Center and Archives	52,781	56,468	54,789	55,202		
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Performance Measures Descriptions

Measure 1: Decrease in this measure is due to a statistic change in the new software system, which does not quantify refiles or track errant requests for records that are already destroyed.

Measure 2: Combination of in-person, telephone, and website statistics. Expected to increase with improved online content. Measure 3: Physical Records Center holdings expected to decrease, though historic archives holdings (and electronic inactive records holdings. not captured here) expected to increase.

Legal / Contractual Obligation

ORS 192 and OAR 166 outline public records mandates for the Records Officer, microfilm, imaging, storage, retention, access and disposition. Executive Rule 301 assigns the retention schedule function to the Records Management program. Chapter 8.500 of the County Code defines additional responsibilities and obligations of the Records Management program.

Revenue/Expense Detail

	Proposed General Fund	Proposed Other Funds	Proposed General Fund	Proposed Other Funds
Program Expenses	2016	2016	2017	2017
Personnel	\$0	\$483,721	\$0	\$509,516
Contractual Services	\$0	\$128,000	\$0	\$31,500
Materials & Supplies	\$0	\$65,618	\$0	\$37,450
Internal Services	\$0	\$448,627	\$0	\$496,467
Capital Outlay	\$0	\$0	\$0	\$75,896
Unappropriated & Contingency	\$0	\$101,390	\$0	\$60,570
Total GF/non-GF	\$0	\$1,227,356	\$0	\$1,211,399
Program Total:	\$1,227,356		\$1,211,399	
Program FTE	0.00	5.20	0.00	5.20

Program Revenues				
Other / Miscellaneous	\$0	\$972,503	\$0	\$1,073,399
Beginning Working Capital	\$0	\$178,363	\$0	\$138,000
Total Revenue	\$0	\$1,150,866	\$0	\$1,211,399

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 FY2015.

Significant Program Changes

Last Year this program was: FY 2016: 78043-16 Records Management

No significant program changes.