

PURPOSE

The Records Management Department acts as the caretaker of information belonging to the citizens of Collin County. This stewardship involves preserving the information while making it available in a usable and cost effective manner, providing comprehensive records management support to County departments, and ensuring that legally mandated retention schedules and preservation standards for records are followed. The department also provides general information regarding Collin County departments and services via telephone, e-mail, and in person to Collin County citizens.

MAJOR PROGRAMS**Records-Public Service**

Program Description - This function includes providing public assistance to the records of the county; responding to public information requests; making presentations to county, professional, and citizen groups on the importance of preserving and managing local government records; participating in county-wide and/or departmental projects to evaluate, design, implement, and manage new projects/software for compliance with county and state standards and statutes; providing county departments with business process analysis and/or training on Records & Information Management best practices for storing records in paper or electronic formats; and updating county policies and procedures as needed to reflect new technologies, best practices, and changes in statutory requirements.

**Goals & Objectives**

To serve Collin County through the collection, storage, retention, preservation, and disposition of County records entrusted to the department's care and serve as a resource for developing records and information mgt resources and technology. To serve Collin County citizens, business community, and departments by responding promptly to their requests for information.

| PERFORMANCE MEASURES                                                  | CURRENT YEAR ACTUALS   |                        |                        |                        | GOAL    |
|-----------------------------------------------------------------------|------------------------|------------------------|------------------------|------------------------|---------|
|                                                                       | FY2011 -<br>Quarter #1 | FY2011 -<br>Quarter #2 | FY2011 -<br>Quarter #3 | FY2011 -<br>Quarter #4 | FY 2011 |
| Projects Records staff involved in                                    | 3                      | 4                      |                        |                        |         |
| Presentations on records issues internal and external                 | 0                      | 2                      |                        |                        | 10      |
| Public Assistance, requests for information and open records requests | 12                     | 7                      |                        |                        | 250     |

**Records Retention**

Program Description -This function includes maintaining and updating retention schedules; monitoring destruction efforts including providing vendor onsite secure destruction services, training on records & information management; scanning county records for inclusion in the county's electronic records/document management system; providing secured storage for IT back up tapes and original backup microfilm; and reviewing records for preservation of historical and/or archival documents once their retention period has expired.

**Goals & Objectives**

To ensure that all records created and received by the County are maintained, preserved, and disposed of in accordance with County, State, and Federal rules and regulations. Update county retention schedule as per revised Texas State library and archives schedules.

| PERFORMANCE MEASURES                                                                                                      | CURRNET YEAR ACTUALS                                 |                                                                                                        |                        |                        | GOAL                                         |
|---------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|--------------------------------------------------------------------------------------------------------|------------------------|------------------------|----------------------------------------------|
|                                                                                                                           | FY2011 -<br>Quarter #1                               | FY2011 -<br>Quarter #2                                                                                 | FY2011 -<br>Quarter #3 | FY2011 -<br>Quarter #4 | FY 2011                                      |
| Boxes destroyed as per retention schedule                                                                                 | 0                                                    | 860                                                                                                    |                        |                        | 3,500                                        |
| Pages Scanned (Records staff only)                                                                                        | 234,652                                              | 168,237                                                                                                |                        |                        | 750,000                                      |
| Change existing retention schedules to meet new state mandated schedules<br>(6 schedules tentative release date Feb 2011) | None<br>released by<br>state library<br>this quarter | 6 released on 3/22<br>effective 4/3/2011.<br>2 Schedules have<br>been reviewed and<br>changes complete |                        |                        | within 3<br>months of<br>release by<br>state |

**FY 2011 Adopted Budget Summary****Records****Storage and Retrieval**

Program Description - This function includes managing the County's offsite Records Center; managing physical records (paper, microfilm, microfiche, CD, DVD, audio & video tapes, etc.); and managing County's electronic document records system including database structure, users, security roles and rights, storage volumes, formats, etc.

**Goals & Objectives**

Store, retrieve, and preserve County records for departments. Provide a physical and electronic records management (electronic document management system) for county departments.

| PERFORMANCE MEASURES                                             | CURRENT YEAR ACTUALS   |                        |                        |                        | GOAL        |
|------------------------------------------------------------------|------------------------|------------------------|------------------------|------------------------|-------------|
|                                                                  | FY2011 -<br>Quarter #1 | FY2011 -<br>Quarter #2 | FY2011 -<br>Quarter #3 | FY2011 -<br>Quarter #4 | FY 2011     |
| File folders & file research requested from Records Center       | 471                    | 939                    |                        |                        | 3,500       |
| Records Center Storage Capacity - end of quarter                 | 93.96%                 | 97.31%                 |                        |                        | 95.00%      |
| New boxes received for storage                                   | 250                    | 295                    |                        |                        | 2,000       |
| Electronic records managed by RMS system- Documents Total        | 1,732,274              | 2,049,931              |                        |                        | 2.5 million |
| Electronic records managed by RMS system- Images Total           | 15,655,013             | 17,142,485             |                        |                        | 25 million  |
| Physical(paper, microfilm, CDs, DVDs, etc) managed by RMS system | 23                     | 513                    |                        |                        | 15,000      |



