

## FY 2011 Adopted Budget Summary

### PURPOSE

The Records Management Department acts as the caretaker of information belonging to the city, preserving the information while making it available in a usable and cost effective manner, providing to County departments, and ensuring that legally mandated retention schedules and processes are followed. The department also provides general information regarding Collin County departments and services to the County citizens.

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### MAJOR PROGRAMS

#### **Records-Public Service**

Program Description - This function includes providing public assistance to the records of the county, making presentations to county, professional, and citizen groups on the importance of preserving records; participating in county-wide and/or departmental projects to evaluate, design, implement, and refine county and state standards and statutes; providing county departments with business process and records management best practices for storing records in paper or electronic formats; and updating county records technologies, best practices, and changes in statutory requirements.

#### **Goals & Objectives**

To serve Collin County through the collection, storage, retention, preservation, and disposition of records; care and serve as a resource for developing records and information mgt resources and technologies; community, and departments by responding promptly to their requests for information.

PERFORMANCE MEASURES	FY2011 - Quarter #1
Projects Records staff involved in	3
Presentations on records issues internal and external	0
Public Assistance, requests for information and open records requests	12

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#### **Records Retention**

Program Description -This function includes maintaining and updating retention schedules; vendor onsite secure destruction services, training on records & information management; selecting an electronic records/document management system; providing secured storage for IT back up tape records for preservation of historical and/or archival documents once their retention period has ended.

## Goals & Objectives

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

PERFORMANCE MEASURES		FY2011 - Quarter #1
Boxes destroyed as per retention schedule		0
Pages Scanned (Records staff only)		234,652
Change existing retention schedules to meet new state mandated schedules (6 schedules tentative release date Feb 2011		None released by state library this quarter

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## Storage and Retrieval

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

## Goals & Objectives

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

PERFORMANCE MEASURES		FY2011 - Quarter #1
File folders & file research requested from Records Center		471
Records Center Storage Capacity - end of quarter (restated 2nd & 3rd quarters)		93.96%
New boxes received for storage		250
Electronic records managed by RMS system- Documents Total		1,732,274
Electronic records managed by RMS system- Images Total		15,655,013
Physical(paper, microfilm, CDs, DVDs, etc) managed by RMS system Total		23

## Records

izens of Collin County. This stewardship involves providing comprehensive records management support. Preservation standards for records are followed. The services via telephone, e-mail, and in person to Collin

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county; responding to public information requests; serving and managing local government records; manage new projects/software for compliance with analysis and/or training on Records & Information ty policies and procedures as needed to reflect new

n of County records entrusted to the department's ology. To serve Collin County citizens, business

CURRENT YEAR ACTUALS			GOAL
FY2011 - Quarter #2	FY2011 - Quarter #3	FY2011 - Quarter #4	FY 2011
4	5	7	
2	2	3	10
7	21	33	250

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monitoring destruction efforts including providing nning county records for inclusion in the county's pes and original backup microfilm; and reviewing xpired.

disposed of in accordance with County, State, and  
ry and archives schedules.

CURRENT YEAR ACTUALS			GOAL
FY2011 - Quarter #2	FY2011 - Quarter #3	FY2011 - Quarter #4	FY 2011
860	804	1,858	3,500
168,237	222,390	156,856	750,000
<p>6 released on 3/22 effective 4/3/2011. 2 Schedules have been reviewed and changes complete</p> <p>remaining 4 effective 4/3/2011</p> <p>5 schedules revised Aug 14 2011; completed 3 (PS, LC, GR) updates have 2 to go</p> <p>within 3 months of release of new schedule by state library</p>			

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er; managing physical records (paper, microfilm, records system including database structure, users,

tronic records management (electronic document

CURRENT YEAR ACTUALS			GOAL
FY2011 - Quarter #2	FY2011 - Quarter #3	FY2011 - Quarter #4	FY 2011
939	416	2,750	3,500
94.75%	89.67%	90.16%	95.00%
295	188	223	2,000
2,049,931	2,119,921	2,174,103	2.5 million
17,142,485	17,954,883	18,687,146	25 million
513	555	913	15,000