

**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 participating County departments, and ensuring that legally mandated retention schedules and preservation standards for records are followed.

**MAJOR PROGRAMS****RECORDS PUBLIC SERVICE**

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.

**FY 2013 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

**RECORDS RETENTION**

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.

**FY 2013 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 Collin County retention schedule as per revised Texas State library and archives schedules.
- To scan 600,000 pages annually.

| PERFORMANCE MEASURES                                | FY 2009<br>ACTUAL | FY 2010<br>ACTUAL | FY 2011<br>ACTUAL | FY 2012<br>ACTUAL | FY 2013<br>Q1 | FY 2013<br>Q2 |
|-----------------------------------------------------|-------------------|-------------------|-------------------|-------------------|---------------|---------------|
| Number of Boxes destroyed as per retention schedule | 3,036             | 2,216             | 3,522             | 2,006             | 600           | 483           |
| Pages Scanned (internal)                            | 326,914           | 748,050           | 782,135           | 432,310           | 232,204       | 104,873       |

**STORAGE AND RETRIEVAL**

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.

**FY 2013 Goals & Objectives**

- Store, retrieve, and preserve County records for participating departments.
- Provide a physical and electronic records management (electronic document management system) for participating Collin County departments.
- To store 500 boxes annually.

## FY 2013 Adopted Budget Summary

## Records

### STORAGE AND RETRIEVAL CONT'

#### FY 2013 Goals & Objectives

- To electronically record and manage 11,000,000 documents annually using the Records Management System
- To electronically record and manage 85,000,000 images annually using Records Management System (RMS).

| PERFORMANCE MEASURES                                          | FY 2009<br>ACTUAL | FY 2010<br>ACTUAL | FY 2011<br>ACTUAL | FY 2012<br>ACTUAL | FY 2013<br>Q1 | FY 2013<br>Q2 |
|---------------------------------------------------------------|-------------------|-------------------|-------------------|-------------------|---------------|---------------|
| File folders & file research requested from<br>Records Center | 4,912             | 3,592             | 4,576             | 3,624             | 824           | 791           |
| Records Center Storage Capacity - end of year                 | 110%              | 105%              | 90%               | 120%              | 105%          | 104%          |
| New boxes received for storage                                | 1,581             | 1,178             | 956               | 509               | 48            | 128           |
| Electronic records managed by RMS system-<br>Documents        | 747,481           | 1,654,379         | 8,076,229         | 10,523,445        | 3,452,754     | 3,663,330     |
| Electronic records managed by RMS system-<br>Images           | 2,399,691         | 2,639,758         | 69,439,527        | 75,226,767        | 26,250,562    | 27,448,577    |