

Elected Official's Offices

Preparing your records for archiving

Guidelines for fulfilling your public records obligations

An elected official's records are considered permanent and historical, with few exceptions. This status extends to all office personnel because they are doing the work of the elected official.

Some points to keep in mind:

- The records created or managed by the elected official's office are part of the elected's legacy and need to be saved (by law) and kept together.
- Staff who will remain with the City, but in different roles, may take copies of records they are working with that are pertinent to their new jobs, but the official record must remain with the office records.
- If the office would like to leave records for the incoming elected official, it is best to leave copies – this includes electronic files. We need to maintain a clean delineation between the current elected's records and the incoming.

Specific guidance:

- Hard copy records: Because these records will be accessed after the office is closed, it is necessary to create lists of the files/contents of each box. The City Attorney's office is much happier when a number of files can be quickly produced, rather than needing to assess dozens of boxes.
 - Remember to label each box and include in the box title the name of the key staff responsible for the records.
 - Tutorials, instructions and forms for sending boxes to the Records Center (PARC) can be found on the Archives & Records Management website: <http://www.portlandoregon.gov/archives/51812>.
- Electronic records:
 - If you put documents or email into TRIM, you've done what you need to do and can delete copies stored on your computer or in your email.
 - If it isn't in TRIM, you have to do a few things to fulfill your legal obligation:
 - At minimum, move electronic files to the office share drive. This includes files living on flash drives, drop boxes, computer/device hard drives, phones, etc. Everything must be brought together on the share drive or put into TRIM.
 - Calendars: the elected's calendar, along with the chief of staff and policy directors/managers, are considered permanent. If you have any questions about how to preserve these, contact Brian Brown (ext. 5-4108)

- Photographs: photos are permanent and need to be preserved with the City Archives. If images **only** exist within social media or photo sharing sites, please contact Brian Brown (ext. 5-4108) to discuss the best way of transferring them. If images posted to social media are copies and the office maintains the official version on the office share drives, please let Brian know so they can be captured and transferred.
- Social media: any social media outlets used by the office are also considered public records. Please contact Brian Brown (ext. 5-4108) to arrange for transferring the sites. You will need to provide all login information.
- Gifts: Not all gifts to the City make it into the Archives; those that are not chosen will either remain in the office for display purposes or are donated to an appropriate agency. I will work with you on deciding what will get transferred to the Archives and can discuss alternatives for donation.
- Non-permanent records: as mentioned above, there are some records that are not permanent and should be segregated. These records most commonly fall within office and personnel management. Here is a list of the more common non-permanent records:
 - Council Ordinances, Resolutions, Agendas: Unless the elected official took extensive notes on the materials, there is no need to retain Council records because the Auditor's office is responsible for maintaining these.
 - Timekeeping records: once the information has been entered into SAP and verified, the timekeeping records can be confidentially destroyed.
 - Accounts payable, including PCard: once copies of invoices are submitted to SAP and the purchases verified, these records can be destroyed.
 - Personnel records: contact BHR to determine if they require any of the records contained in the personnel files. Follow BHR rules on personnel files.

Finally, remember to remove any personal files, emails, photographs or other records you may have stored in the office or on your computer. These are not public records and should not be archived.



Portland City Auditor Archives and Records Management

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