



**Portland
City Auditor**
Archives & Records Management



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.

Points to keep in mind

- The records created or managed by the elected official's office are part of the elected official's legacy and need to be saved (by law) and kept together.
- Staff who move to another City office 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.
- In the event of portfolio changes, or the closing of an office: If the office would like to make records available to a new, or incoming office, it is best to provide copies – this includes electronic files. We need to maintain a clean delineation between each elected official's records.

Specific guidance

Hard copy records

Because these records will be accessed even 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

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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: <https://www.portlandoregon.gov/archives/69421>.

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 preserving the information on the sites.

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. Diana

Banning 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 P-Card

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