



## ARA-8.01 - Preservation of Archival (Historical) Material

Administrative Rules Adopted by City Council (ARC)

Policy category: [Archives & Records Management](#)

Policy number: ARA-8.01

Search Code, Charter,  
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Keywords

Search

### Purpose

As the official custodian of the City's archival resources, the Archives and Records Management program (A/RM) maintains records of Portland's history dating back to 1850 and consists of records created by elected officials, defunct agencies and bureau records having historical significance. Additionally, A/RM collects records closely aligned and supportive of the history of City government and projects that illustrate the growth of the city over time. The collection resides on a variety of media, including paper records, microfilm, maps and photos. It is the intention of A/RM to collect the City's historical records and house them in one location to serve as the single point for preservation and research for both citizens and City employees.

While A/RM is charged with preserving the City's archives, it is the responsibility of every employee and bureau to ensure that City records are protected from damage and inappropriate destruction. Records identified as archival have an elevated expectation and need for preservation throughout their life. This policy sets the means for collecting and preserving the city's historical records.

### Authority

City Code Chapter 3.76.030 Authority and Duties of the Records Management Officer.

*The City Auditor shall maintain a professional Archives and Records Management Program for the City, and shall be responsible for the care, maintenance and access of all City records. The City Auditor shall be the custodian for all permanent records for which an agency has transferred ownership to the Auditor and for all historical records.*

## Policies

1. The City's historical records may not be donated, sold, destroyed or otherwise removed from the City's jurisdiction without permission of the City Auditor.
2. A/RM will actively pursue the return of historical records improperly removed from the City's jurisdiction, or City records with limited or no access.
3. A/RM accessions records into the Archives through several methods:
  - a. Direct transfer via the Records Retention Schedules. Historical records obtained through the disposition process will automatically be accessioned into the Archives at the archivist's direction.
  - b. Transfer of jurisdiction from the bureau to Archives and Records Management. This agreement formally transfers the custody and jurisdiction of the records to the Archives, along with the responsibility for ongoing access and preservation.
  - c. Records meeting the collecting policy may be accepted via donation. A Deed of Gift is required for records accessioned from non-city sources
  - d. A/RM may seek to purchase selected items that both meet the collecting policy and are not offered as a donation.
4. Records accessioned into the Archives will be managed according to archival and State-mandated standards.
5. Records stored in bureau offices or other facilities owned or leased by the City shall meet the minimum environmental, access and security standards set by A/RM.
6. A/RM may require bureaus to transfer records to the Archives if bureaus are unable to meet the minimum standards for access, environment and security.

## Responsibilities

Bureaus shall:

1. Notify A/RM of records within their bureau that are more than 25 years old or records having historical significance because they document the bureau's history, major projects or have an impact on social and community history.
  - a. Records that are not needed for the day-to-day operations of the bureau and are determined to be historically significant by the City Archivist will be transferred to the Archives upon request.

- b. Bureaus shall designate an authorized employee who may sign the *Transfer of Jurisdiction*.
  - c. Records that are needed for day-to-day operations and that are identified as being historically significant may require additional bureau measures to ensure the longevity, protection and access to the records while in the bureau's custody. A/RM will identify steps needed to comply with the standards. Bureaus may also choose to maintain copies of historically significant records needed for day-to-day operations and transfer the originals to the Archives for preservation.
  - d. Upon notification from Archives and Records Management, sign the Transfer of Jurisdiction form and transfer records to A/RM as instructed by the City Archivist
2. Ensure that bureau records are protected in accordance with City Code and A/RM policies.
  3. Notify A/RM of City-created records that are held by individuals or non-City entities.

#### Archives and Records Management

1. A/RM will notify bureaus of records requiring transfer to the Archives and will complete a Transfer of Jurisdiction form to be signed by a Bureau representative.
2. A/RM will negotiate the return of records removed from the City's control.
3. A/RM will work with bureaus to plan measures for preservation and access to historical records stored in their offices.

## History

Filed for inclusion in PPD September 30, 2004.

Amended by Ordinance No. 182637, passed by City Council April 1, 2009 and effective May 1, 2009.

Administratively renamed ARA-8.01 on December 6, 2022