



Records Management and Archives

**POLICY + COUNTYWIDE STANDARD PROPOSAL  
FOR THE EXECUTIVE COORDINATION COMMITTEE**

July 23rd, 2024



# Overview

1. Introduction – Maren Slaugh and Megan Hillyard
2. Recap – previous changes to Countywide GRAMA Policies
3. RIM Committee
4. New information to review:
  1. Policy Amendment
  2. New RMA Policy
  3. Proposed RMA Standards (4)
  4. Introduction of RMA Guideline

# Recap

Condensed 16 GRAMA Policies into 2 new policies:

Public Access

Records and Information Management (RIM)



2022

2023-2024

1. New Standard and a Reference Guideline created.
2. Stakeholders (including RIM committee) review
3. Records Coordinator training and certification created for SABA
4. HB266 Created

# Records and Information Management Committee

## **Committee Members**

- Antigone Carlson – Contract and Procurement
- Corie Soderman – Assessor
- Karen Helfrich - Auditor
- Darrell Passey – Records Management and Archives
- Laura Fuhriman – Surveyor
- Maren Slaugh – Records Management and Archives
- Melissa Haslam– SLCo Library
- Heather Edwards– Health Department
- Robert Fowler– Information Services
- Michelle Hicks – Mayor’s Portfolio
- Phil Conder – Treasurer
- Roseanna Clark – Aging and Adult Services
- Zelma (Lee) Farrington – Sherriff

## **Legal Counsel:**

- Gavin Anderson - District Attorney
- Mitch Park – District Attorney, Legal Counsel, County Council
- Stacia Sidlow – District Attorney



## Proposed Policy Changes:

- Countywide Policy 2010 – Public Access (*amended as a response to HB266*)

Countywide Policy 2021 - Records Management and Archives  
Policy and Standards (new policy)



# Countywide Policy 2010 – Public Access (amended)

- **Reason for change:** Response to HB266
- Update to section 63G-2-401 (Chief Administrative Officer (CAOA) appeal)
  - Requester has the right to request mediation with the Government Records Ombudsman prior to appealing the State Records Committee or Third District Court.



# Proposed NEW Policy: Policy 2021 - Records Management and Archives Policy and Standards Highlights



**County Records Management and Archives (RMA) resources reflect best practice standards**



**Defines the process by which RMA policies and standards are developed and approved.**



**2021-1 Classification and Retention Scheduling**



**2021-2 Transferring, Storing, and Retrieving Records at the Records Center**



**2021-3 Transferring and Storing Records at The Archives**



**2021-4 Disposal of Records Standard**



# Proposed RMA Standards



**2021-1 Classification  
and Retention  
Scheduling**



**2021-2 Transferring,  
Storing, and  
Retrieving Records  
at the Records  
Center**



**2021-3 Transferring  
and Storing Records  
at The Archives**



**2021-4 Disposal of  
Records Standard**





## Standard 2021-1 Classification and Retention Scheduling Highlights



Language and educational resources migrated from repealed Policy 2080 (GRAMA Records Designation and Classification Process).



Standard will offer guidance regarding the records retention scheduling process, including classification of agency record series.



## Standard 2021-2 Transferring and Storing Records at the Records Center Highlights



Language and educational resources migrated from repealed Policy 2105 (Storing Records at the Records Center).



Offer guidance regarding the transferring of records as well as retrieving records still in the custody of the agency.



Standard includes links to pertinent forms agencies need to transfer records to the Records Center.



## Standard 2021-3 Transferring and Storing Records at the Archives Highlights



Language and educational resources migrated from repealed Policy 2105 (Storing Records at the Records Center).



Offers guidance to County agencies regarding the transfer of County records that are of legal, fiscal, or historical value to County Archives for appropriate preservation and safe keeping.



Explains that County agencies are responsible for assisting County Records Management and Archives in the collection of such records, depository materials, and artifacts through best practices advised by the records policy administration.



## 2021-4 Disposal Of Records Standard Highlights



Language and educational resources migrated from repealed Policy 2110 (Disposal of Records).



Offer guidance to County agencies regarding disposal of records once they meet their retention that are stored within their suite.



Addresses how records stored at the County Records Center are disposed of once the records have met their retention.



## NEW: RMA Guideline



**Guideline is designed to be an RMA 101 for all county employees**



**Provides agency records coordinators and other County employees with the basics of records management.**



**Introduces the Records Management and Archives Division and their purpose**



**Explains the purpose for the RIM Committee its role with in assisting records coordinators.**



**Reviews the GRAMA request process and NextRequest.**



**Reviews electronic communications (email) retention and Social Media retention**



**Highlights the Archives use of SocialArchiving platform to preserve County social media on all platforms.**



# Questions?