

STAFF REPORT



SUBJECT: City Secretary Records Management Update

DEPARTMENT: Administration

STAFF CONTACT: Sarah Lockenour, City Secretary

2024 QUARTER 1 RECAP:

When the Deputy City Secretary position was requested and considered, digitizing records was the primary goal for that position. In the Records Management Plan submitted to Council, organizing and effective use of our current storage system, Laserfiche, was one of the first projects.

Cemetery Records – 5000 records

City Council Minute Records - 2000 records

Ordinances and Resolutions – 1500 records

Property Records – 3500 records

TABC Records – 250 records

City Secretary Records – 11,200 records

By adding the metadata to each record, we are now, and more importantly future users, can find documents quickly and more efficiently. We have set up workflows and templates, so documents added in the future are stored correctly and in a way that is usable. Part of this process was also reviewing our locally stored documents to evaluate what was not currently in Laserfiche and what documents should be moved over. If we plan to be fully digitized, all records with a retention longer than ‘administratively valuable’ need to be kept on our shared drives as well as Laserfiche.

2024 QUARTER 2:

Since March the City Secretary’s office has worked with Development Services on combing through the shared drive to ensure all documents that have a retention longer than ‘administratively valuable’ are also stored in Laserfiche. There are about 86,000 documents on the Development Services shared drive and about 23,000 on the Development Services Laserfiche repository that have all been evaluated and processed for retention with metadata added. As we move forward into Q3, we plan to reevaluate the documents in the shared drive to double check everything is in Laserfiche and coach new staff on retention through Laserfiche.

We have also processed files for Administrative Services through their shared drives and Laserfiche. There are about 14,000 documents on the Administrative Services (Airport, Mainstreet, Tourism) shared drive that have all been evaluated and processed appropriately.

We have been able to have an intern work with us this summer who has been scanning building plans from the basement. He has scanned 105 plan sets, about 800 pages of building plans, so far and plans to continue through the fall semester.

In searching for some older documents for the Fire Department, we were able to digitize and process about 5000 records (about 8 banker boxes).

Overall, in Records Management alone, Quarter 2 has been extremely productive, and we have made great strides in the transition from 'record keeping' to 'record management'.

The City Secretary and Deputy City Secretary have completed 20 hours of training through Laserfiche and have begun taking Police Department specific records training to be better able to assist the PD Records Clerks.

PLANNING FOR QUARTER 3 AND 4:

For Q3, we plan to complete the Administrative Services, GIS records which include about 1100 records in the current Laserfiche repository and about 30,000 records on the shared drive to be evaluated and processed.

We also have a few loose ends in the departments and areas we have worked on so far this year, that we will circle back to and finalize. This will include detailed operating procedures for each department/area so the work we have accomplished so far will continue. This will prepare us to finish Q4