

**RECORDS MANAGEMENT  
QUARTERLY REPORT  
FY 2018-2019  
QTRS 1, 2, 3 (October, 2018 – June, 2019)**

Records Management is the application of management techniques to the creation, use, maintenance, retention, preservation, and disposal of records for the purposes of reducing the costs and improving the efficiency of recordkeeping. The term includes the development of records control schedules, the management of filing and information retrieval systems, the protection of essential and permanent records, the economical and space-effective storage of inactive records, control over the creation and distribution of forms, reports, and correspondence, and the management of micrographics and electronic and other records storage systems. (Texas Local Government Code, Chapter 201, Section 201.003, Subsection 13)

**Accomplishments:**

- Update of the City's Records Management Program with adoption of Ordinance 2018-22
- Adoption of a Records Destruction Policy with approval of Resolution 2019-04
- Completion of Public Information Act Training for Department Directors and Records Liaisons
- Completion of Records Destruction Training for Records Liaisons
- Destruction of 158 boxes of records pursuant to adopted retention schedules
- Implementation of electronic signing and electronic agenda briefing processes through DocuSign
- Implementation of conversion of paper records to electronic in OneDrive (Office 365)

**Goals for 4<sup>th</sup> Quarter FY 2018-19:**

- Shredding of on-site records eligible for destruction before end of fiscal year
- Adoption of Electronic Records Management Policy
- Training for Directors on current agenda briefing process through DocuSign
- Catch up on Minutes upload to the City's website
- Catch up on Ordinances, Resolutions, Minutes upload to the Online Library
- Training for Records Management Officer on SharePoint setup for Electronic Document Storage
- Creation of Records Management Quarterly Report that incorporates cost savings and records management expense reporting