



MEMORANDUM

TO: Executive Team

FROM: Valerie Burrowes, MMC, City Clerk

SUBJECT: City-Wide Records Management Program

The Office of the City Clerk has hired a firm, Gladwell Governmental Services, Inc., which specializes in records management in California cities to facilitate the development of our Records Management program. The President of the firm, Diane R. Gladwell is a Certified Municipal Clerk with over twenty years experience managing in public and private sectors.

Ms. Gladwell has facilitated records management programs for over 40 cities and counties in California, and has received multiple awards recognizing excellence in municipal government administration.

We have designed the project to be interactive and have the minimum demand on staff time, while providing the highest level of cost/benefit for us.

The project is expected to provide us with the following results:

- ◆ Free up Office Space
- ◆ Increase efficiency (increase available labor to perform other tasks)
- ◆ Consistency in operations
- ◆ Clearly identify which departments are responsible for which types of records
- ◆ Protection of valuable documents
- ◆ Preparation for document imaging production (where applicable)

- ◆ Increased service levels to both internal and external customers

The project manager for this Citywide project is Assistant City Clerk Teresa Fahning, CMC.

Every Department should appoint at least one primary and one alternate Records Associate; it is recommended that each major division appoint a primary and alternate Records Associate. Records Associates will be asked to contribute their procedures, forms, knowledge and opinions about the operations within each department and division to ensure your needs are addressed and incorporated into the program that is adopted. The position appointed to be a Records Associate should have some decision making authority within the department and know how records are developed, utilized and stored with your department.

We have designed this project to require minimal time from Records Associates while maximizing the information that they acquire (which will directly benefit your department). Records Associates will be expected to devote approximately 20 - 40 hours to the project over the next three months.

Executive Team page -2-

RE: City-Wide Records Management Program

I would humbly request your participation in this program by the appointment of a primary and alternate Records Associate to represent your department. In the case of larger departments, you may wish to appointment a primary and an alternate for each of your divisions, if so, that would be fine.

Please notify Teresa Fahning, Project Manager for this program of your choice(s) no later than Monday, September 9th. She may be reached at ext. 0112 or by e-mail.

All Records Associates so appointed by their department(s) will become members of the Records Management Design Team.

The first meeting of the RMDT (Records Management Design Team) will be held on Wednesday, September 18th at 2 p.m. in the Council Chamber. We will have a project kickoff and provide them with the details of the project; refreshments will be served. The second meeting is scheduled for Monday, September 30th at 8:30 am and again held in the Council Chamber.

If you have any questions with regards to this request, I trust you will give me a call or

e-mail me at your convenience.

I look forward to this long over-due project finally moving forward for the benefit of all departments. It is very important that you be represented and I thank you for designating the time of your appointee and alternate to assist with the Design Team.