



Naming an Agency Records Officer

PURPOSE

This document expands on the definition of a Records Officer, including an explanation of the responsibilities and skillsets of someone in this role.

DEFINING A RECORDS OFFICER

A Records Officer (RO) coordinates the retention and timely disposition of public records within a government entity and acts as the entity's primary liaison with the State Archives. All state agencies are required to designate a records officer per ORS 192.105(2)(a), but all public entities, regardless of size, should designate someone to perform the function. In large agencies ROs often work with a team of records coordinators in different divisions. Many agencies have the RO as a standalone position. Others have RO duties included in another role. Whichever route an agency takes, it is crucial that sufficient time and internal authority is given to the RO for them to be successful in their role

A Records Officer's Responsibilities

- Stays current on trainings offered by the State Archives, and shares that knowledge with others
- Acts as a central point of contact for records questions in the agency
- Answers general records questions and refers more complex questions to State Archives
- Coordinates the review and revision of their agency's special retention schedule (State Agencies)
- Understands the scope of agency's records and knows where they are located digitally and physically
- Assists their agency with records organization, file structure, and naming conventions



- Identifies records retentions based on applicable retention schedules
- Coordinates agency efforts to clean up old drives, systems, and storage environments
- Coordinates with transfer of records to and from the State Records Center and State Archives, when necessary
- Oversees the annual destruction of records that have reached the end of their retention period

Characteristics of an Effective Records Officer

- Has the ability to connect across all divisions/departments within their agency
- Has good communication skills, and a willingness to engage with all types of people
- Is well organized, with an attention to detail
- Has an interest in learning all about records management and is willing help others in the agency do the same

