

1.2 Business Operations Division Reference File Maintenance

Purpose

To ensure the Business Operations Division maintains required records and copies of important resource materials in compliance with retention requirements.

Maintenance of Division Reference Files

City Bureaus are required to maintain public records they generate in compliance with retention requirements established by the City Auditor's Office. Examples of records maintained by Business Operations Division include development and submission files related to the Office of Management and Finance's budget submissions, financial analyses, accounting transaction support not stored in SAP, procurement contract documents, personnel documentation, strategic plan documentation, customer service survey documentation, and other documents produced by the Division.

In addition, the Business Operations Division maintains a set of reference materials for use by Division and Office of Management and Finance staff. These documents are not necessarily generated by Business Operations but are used and referenced in the Division's work. Examples of reference file contents include budget-related reports, briefings for elected officials, City bureau organizational charts, project materials, various consulting reports, strategic plans, OMF studies, and survey results.

Records and reference files are maintained in either hard copy format or electronically in TRIM, the records management system used by the City of Portland.

It is the responsibility of the Administrative Team of the Business Operations Division, under the direction of the Administrative Supervisor, to maintain the files, including an index of materials available in the reference files. When an employee requests a copy of a file, they are required to sign out materials in use and are responsible for returning them following review.

Date Created: November 1, 2013

Date of Last Revision: