



47 Tips and Benefits to Master Public Records Requests Management

As a public records requests manager, you ensure transparency, compliance, and efficiency within your organization. Your work facilitates the flow of information between the government and the public and helps build trust. We understand the challenges you face daily, from managing a high volume of requests to navigating complex legal requirements.

To support you in this vital role, we've created this comprehensive checklist, "47 Tips and Benefits to Master Public Records Requests Management." Whether new to the position or a seasoned professional, our goal is to provide actionable insights and best practices that make your job easier and more fulfilling. From utilizing modern technology to fostering a culture of transparency, these tips cover many strategies that can help you excel in your role.



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Professional Development

TIP	BENEFIT
<p>1. Celebrate Sunshine Week each year because you deserve it.</p>	<p>Celebrating Sunshine Week raises awareness about the importance of open government and transparency.</p>
<p>2. Join relevant national and state records associations for educational and networking opportunities, such as the Association of Records Managers and Administrators (ARMA), the National Association of Government Archives & Records Administrators (NAGARA), and the Virginia Association of Government Archives & Records Administrators (VAGARA).</p>	<p>These associations provide valuable resources, training, and networking opportunities to enhance your skills and knowledge.</p>
<p>3. Earn your Essentials of Records and Information Management (RIM) Certificate.</p>	<p>This certification demonstrates your expertise and commitment to best practices in records management.</p>
<p>4. Find a mentor or offer your mentorship to someone new in the public records request management space to share knowledge and experience.</p>	<p>Mentorship promotes knowledge sharing and professional growth within the field.</p>
<p>5. Provide training on the importance of transparency and the role of public records in government accountability to all staff.</p>	<p>Training fosters a culture of transparency and underscores the importance of public records in accountability.</p>
<p>6. Stay informed about best practices in public records management to implement the most effective strategies.</p>	<p>Staying updated on best practices ensures you are using the most effective methods and technologies</p>



TIP	BENEFIT
<p>7. Participate in professional development opportunities related to public records management to enhance your skills and knowledge.</p>	<p>Professional development opportunities keep your skills and knowledge current and relevant.</p>
<p>8. Develop a network of public records professionals to share knowledge and support each other.</p>	<p>Networking with peers provides valuable insights, support, and knowledge sharing.</p>

Saving Time

TIP	BENEFIT
<p>9. Create a Frequently Asked Questions (FAQs) webpage to deflect the most common questions the public ask, saving staff time for more important tasks.</p>	<p>FAQs reduce the volume of common inquiries, allowing staff to focus on more complex requests.</p>
<p>10. Provide regular staff training to ensure everyone is following the same process, sharing best practices, operating efficiently, and surfacing staff concerns.</p>	<p>Regular training promotes consistency, improves skills, and addresses any issues or concerns.</p>
<p>11. Eliminate manual processes and enable your agency to accept public records requests through a modern digital portal that can accept online payments.</p>	<p>Digital portals streamline request submission and processing, reducing manual workload and increasing efficiency.</p>
<p>12. Be prepared for the inevitable spike in public records requests during election season by planning and allocating resources accordingly.</p>	<p>Planning for high-demand periods ensures timely responses and maintains service quality.</p>



TIP	BENEFIT
<p>13. Automate the tracking and management of public records requests to reduce manual workload and increase efficiency.</p>	<p>Automation improves accuracy, speeds up processing, and reduces the burden on staff.</p>
<p>14. Maintain an internally searchable archive of previous requests and responses for quick reference.</p>	<p>An internal archive allows for quick reference to past requests, saving time and ensuring consistency.</p>
<p>15. Develop templates for common types of public records requests to streamline responses and ensure consistency.</p>	<p>Templates speed up the response process and ensure consistent, accurate replies.</p>
<p>16. Use analytics to identify trends and anticipate future public records requests to stay ahead of demand.</p>	<p>Analytics help predict trends, allowing for better resource planning and management.</p>





Legal and Compliance

TIP	BENEFIT
<p>17. Thoroughly understand your state's public records request laws and exemption codes to ensure full compliance.</p>	<p>Comprehensive knowledge of laws and exemptions ensures legal compliance and protects sensitive information.</p>
<p>18. Understand your state's mandatory timing requirements to prevent legal complications.</p>	<p>Adhering to timing requirements ensures compliance and prevents legal issues or penalties.</p>
<p>19. Strictly adhere to storage and retention laws to maintain legal compliance.</p>	<p>Proper retention and storage practices ensure legal compliance and the preservation of important records.</p>
<p>20. Where allowed by state law, use fees to recover the costs associated with processing requests.</p>	<p>Charging fees helps offset the costs of processing and managing public records requests.</p>
<p>21. Create an emergency and crisis management plan to effectively handle unexpected situations.</p>	<p>A crisis management plan ensures preparedness and continuity of operations during emergencies.</p>
<p>22. Audit your public records requests processes regularly to identify areas for improvement.</p>	<p>Audits help identify inefficiencies and areas for improvement, enhancing overall effectiveness.</p>
<p>23. Implement a quality control process to ensure the accuracy and completeness of responses.</p>	<p>Quality control ensures that all responses are accurate, complete, and meet legal requirements.</p>



TIP	BENEFIT
24. Regularly review and update your public records requests procedures to reflect changes in laws and regulations.	Keeping procedures up-to-date ensures compliance with current laws and best practices.
25. Ensure that your process for handling public records requests complies with all relevant data protection and privacy laws to avoid legal issues.	Compliance with data protection and privacy laws is crucial to avoid legal repercussions and maintain trust.

When Handling Requests

TIP	BENEFIT
26. Ensure there is a collaborative records review environment between and within departments.	Collaboration helps maintain consistency, accuracy, and efficiency in handling records.
27. Simplify and standardize the redaction rules and procedures to ensure consistency and compliance.	Clear and consistent redaction procedures protect sensitive information and ensure compliance with legal requirements.
28. Develop a public records policy to help requestors understand available information and guide staff in providing consistent responses.	A clear policy ensures transparency, sets expectations, and provides a framework for staff to follow.
29. Ensure all staff members are aware of and follow your public records policy, and make sure it's easily accessible on your website.	Consistent adherence to the policy ensures uniform handling of requests and compliance with regulations. Easy access to the policy promotes transparency and helps requestors understand the process.



TIP	BENEFIT
<p>30. Clarify the scope of the request, if needed, to ensure accurate and complete responses.</p>	<p>Clarifying requests prevents misunderstandings and ensures that responses meet requestor needs.</p>
<p>31. Establish a clear process for handling requests with confidential or sensitive information to protect privacy and comply with regulations.</p>	<p>A clear process ensures that sensitive information is handled appropriately, protecting privacy and legal compliance.</p>
<p>32. Develop a process for responding to large or complex public records requests to ensure thorough and timely responses.</p>	<p>A dedicated process for complex requests ensures they are handled efficiently and accurately.</p>
<p>33. Collaborate with other departments and agencies to share resources and best practices for mutual benefit.</p>	<p>Collaboration enhances resource sharing and promotes the adoption of best practices across departments.</p>
<p>34. Create a checklist for public records requests to ensure consistent completion of all necessary steps.</p>	<p>Checklists ensure all steps are followed, improving consistency and reducing errors.</p>





For the Public

TIP	BENEFIT
<p>35. Create a public repository via a virtual Public Records Reading Room to streamline access to frequently requested documents and handle duplicate requests.</p>	<p>A virtual reading room improves accessibility and makes frequently requested information more accessible, reducing the workload associated with processing common requests</p>
<p>36. Encourage feedback from requestors to improve your public records request process continually.</p>	<p>Feedback helps identify areas for improvement and enhances the overall process.</p>
<p>37. Promote and educate your community about your public records requests services and process to increase awareness, understanding, and usage.</p>	<p>Promoting your services and educating the community fosters transparency, encourages cooperation, and enhances public trust.</p>
<p>38. Ensure your public records requests portal is user-friendly and accessible to all users.</p>	<p>A user-friendly portal improves the requestor experience and increases accessibility.</p>
<p>39. Provide multiple ways for the public to submit records requests, such as online, by mail, and in person, to accommodate diverse needs.</p>	<p>Offering multiple submission methods ensures inclusivity and convenience for all requesters.</p>
<p>40. Set clear expectations for response times and keep requestors informed of progress to enhance transparency and trust.</p>	<p>Clear communication about response times builds trust and manages expectations.</p>
<p>41. Post your public records requests policies prominently to enhance transparency.</p>	<p>Prominent posting of policies ensures the public is informed about their rights and the request process.</p>



Technology Considerations

TIP	BENEFIT
42. Implement a cloud-based, centralized software system to ensure all records are easily accessible and securely stored.	Centralized, cloud-based solutions enhance accessibility, security, and collaboration across departments.
43. Digitize all your records upon receipt for easier access when requested.	Digitization ensures quick and efficient retrieval of records, reducing response times.
44. Employ a solution that ensures continuity during staff turnover to maintain seamless operations.	Continuity prevents disruptions and maintains service quality during staff changes.
45. Familiarize yourself with the additional resources provided by your state, such as Washington’s Local Government Public Records Consultation Program , to effectively leverage available support.	State resources provide guidance and support, enhancing your ability to manage records effectively.
46. Choose a public records requests management software vendor that has award-winning customer support to ensure you receive timely assistance.	Reliable customer support ensures any issues are quickly resolved, maintaining smooth operations.
47. Ensure your public records requests management software integrates with other systems you use for seamless operations.	Integration with other systems enhances efficiency and reduces duplication of efforts.