

Records Management Program

“Update”

Operations Committee Meeting

January 2006

Agenda

- Program content
- Status of project
- Plans for 2006

2005 Project Goal

Develop a Document Management Program for the Efficient and Systematic Control of the Creation, Receipt, Maintenance and Disposition of Corporate Records.

Program Content

(Both Physical and Electronic Records)

- Clear written document retention policy
 - Records Management policy has been drafted and is under review by staff
 - Records Destruction policy has been drafted and is under review
 - New policies reflect industry standards and are complementary to existing Chugach policies

Program Content continued

- Policy will be effectively communicated and compliance will be monitored
 - Periodic audits: **Audit Test Scripts** have been defined and are **pending program implementation**.
 - Regular employee training: **Training program** has been designed, awaiting approval of the **Records Management Policy and Retention Schedule**.
- Administrative procedures in place
 - Procedure to properly classify records: **Design complete, pending program implementation**
 - For normal storing, retrieving and destruction: **Design complete and tracking software has been implemented**
 - Allows for stopping routine destruction if necessary: **Procedures and forms are complete, pending program implementation**

Current Status

- Completed to date:
 - Chugach-wide records assessment completed.
 - Inventory of inactive boxes in progress, currently 2,004 boxes have been reviewed of which 1928 are recommended for destruction and 76 remain.
 - Each 1000 boxes destroyed yield a \$4,000 per year savings in storage fees.
 - Estimating a 40% annual savings in storage fees which equals \$24,000.

Schedule for 2006

- Continue inventory and classification of inactive records in storage
- Perform special destruction effort of records qualified for destruction based on the records retention schedule
- Appoint departmental record coordinators
- Complete training
- Inventory and classify “in-office” files identified in the records assessment

Schedule Continued

- Develop Document Replacement Authorization Policy, Procedure and Form. (Allows for the replacement of hardcopy records with scanned images)
- Develop procedures for classification of email, word, excel and .pdf documents
- Perform a 2006 Records Audit and report on program performance

Questions & Answers