

Practical Project Management for Records Management

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Key Steps

- 1) Get a Written Scope of Work
- 2) Build a Project Plan
- 3) Analyze Your Needs and Resources
- 4) Prepare a Budget
- 5) Re-Evaluate Your Project Plan
- 6) Develop a Communication Plan

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1. Written Scope

- Clearly Defined
 - What are you doing?
 - How long do you have to do it?
- Expense, Time, Quality

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2. Build a Project Plan

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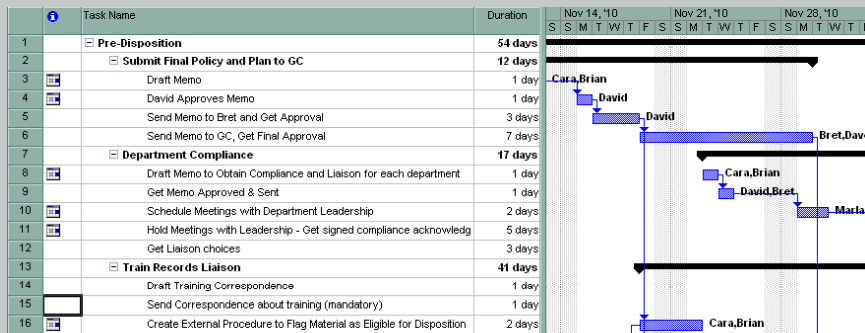
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Microsoft Project

ID	Task Name	Duration	Start	Finish	Predecessors	Resource Names
1	Pre-Disposition	54 days	Tue 11/2/10	Fri 1/14/11		
2	Submit Final Policy and Plan to GC	12 days	Fri 11/12/10	Mon 11/29/10		
3	Draft Memo	1 day	Fri 11/12/10	Fri 11/12/10		Cara,Brian
4	David Approves Memo	1 day	Mon 11/15/10	Mon 11/15/10	3	David
5	Send Memo to Bret and Get Approval	3 days	Tue 11/16/10	Thu 11/18/10	4	David
6	Send Memo to GC, Get Final Approval	7 days	Fri 11/19/10	Mon 11/29/10	5	Bret,Dave,Mike
7	Department Compliance	17 days	Tue 11/23/10	Wed 12/15/10		
8	Draft Memo to Obtain Compliance and Liaison for each department	1 day	Tue 11/23/10	Tue 11/23/10		Cara,Brian
9	Get Memo Approved & Sent	1 day	Wed 11/24/10	Wed 11/24/10	8	David,Bret
10	Schedule Meetings with Department Leadership	2 days	Mon 11/29/10	Tue 11/30/10	9	Marla
11	Hold Meetings with Leadership - Get signed compliance acknowledg	5 days	Mon 12/6/10	Fri 12/10/10	10FS+3 days	David,Bret
12	Get Liaison choices	3 days	Mon 12/13/10	Wed 12/15/10	11	Cara,Brian
13	Train Records Liaison	41 days	Fri 11/19/10	Fri 1/14/11		
14	Draft Training Correspondence	1 day	Mon 12/13/10	Mon 12/13/10	12SS	Cara,Brian
15	Send Correspondence about training (mandatory)	1 day	Thu 12/16/10	Thu 12/16/10	14FS+2 days	Cara,Brian,David
16	Create External Procedure to Flag Material as Eligible for Disposition	2 days	Fri 11/19/10	Mon 11/22/10	5	Cara,Brian
17	Create Training Program and Documentation	15 days	Fri 11/19/10	Thu 12/9/10	16SS,5	Cara,Brian,Bob,David
18	Schedule Training	4 days	Fri 12/17/10	Wed 12/22/10	15	Cara,Brian,Marla
19	Conduct Training	5 days	Mon 1/10/11	Fri 1/14/11		Cara,Brian
20	Obtain Verification of Attendance	5 days	Mon 1/10/11	Fri 1/14/11	19SS	Cara,Brian
21	Software	26 days	Tue 11/2/10	Tue 12/7/10		
22	Update RM with new Schedule/Buckets	2 days	Tue 11/30/10	Wed 12/1/10	6	Cara,Brian,Bob
23	Define how Reports are run to find files for disposition	2 days	Thu 12/2/10	Fri 12/3/10	22	Bob
24	Determine whether additional software is needed and if it is budgete	17 days	Tue 11/2/10	Wed 11/24/10		Bob

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Microsoft Project - Gantt



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Microsoft Project - Calendar

Monday	Tuesday	Wednesday	Thursday	Friday
13	14	15	16	17
	Get Liaison choices, 3 days		Send Correspondence about	Schedule Training
Draft Training Correspondence				
Meet with Debbie & Jaclyn				
Determine if disposition can be assigned to individual emails, 8 days				
Determine Disposition Procedures, 8 days				
Determine which Records Personnel Assist with Off-Site Work, 8 days				
20	21	22	23	24
Schedule Training, 4 days				
Determine if disposition can be assigned to individual emails, 8 days				

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Building the Plan

- Brainstorming

Task Name
<input type="checkbox"/> Pre-Disposition
<input type="checkbox"/> Submit Final Policy and Plan to GC
Draft Memo
David Approves Memo
Send Memo to Bret and Get Approval
Send Memo to GC, Get Final Approval
<input type="checkbox"/> Department Compliance
Draft Memo to Obtain Compliance and Liaison for each department
Get Memo Approved & Sent
Schedule Meetings with Department Leadership
Hold Meetings with Leadership - Get signed compliance acknowledgment
Get Liaison choices
<input type="checkbox"/> Train Records Liaison
Draft Training Correspondence
Send Correspondence about training (mandatory)
Create External Procedure to Flag Material as Eligible for Disposition
Create Training Program and Documentation
Schedule Training
Conduct Training
Obtain Verification of Attendance
<input type="checkbox"/> Software
Update RM with new Schedule Buckets
Define how Reports are run to find files for disposition
Determine whether additional software is needed and if it is budgeted

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Building the Plan

- Brainstorm

	Train Records Liaison	41 days	Fri 11/19/10	Fri 1/14/11		
13						
14	Draft Training Correspondence	1 day	Mon 12/13/10	Mon 12/13/10	12SS	Cara,Brian
15	Send Correspondence about training (mandatory)	1 day	Thu 12/16/10	Thu 12/16/10	14FS+2 days	Cara,Brian,David
16	Create External Procedure to Flag Material as Eligible for Disposition	2 days	Fri 11/19/10	Mon 11/22/10	5	Cara,Brian
17	Create Training Program and Documentation	15 days	Fri 11/19/10	Thu 12/9/10	16SS,5	Cara,Brian,Bob,C
18	Schedule Training	4 days	Fri 12/17/10	Wed 12/22/10	15	Cara,Brian,Marie
19	Conduct Training	5 days	Mon 1/10/11	Fri 1/14/11		Cara,Brian
20	Obtain Verification of Attendance	5 days	Mon 1/10/11	Fri 1/14/11	19SS	Cara,Brian

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Building the Plan

- Timeline
 - Start to Finish
 - Flexible End Date
 - Finish to Start
 - Defined, Inflexible End Date
- Contingencies
 - Start Task B, After Task A

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Building the Plan

- Resourcing Tasks

☐ Communication with Off-Site Storage		38 days	Wed 12/8/10	Fri 1/28/11		
	Determine Disposition Procedures	8 days	Wed 12/8/10	Fri 12/17/10	25	David,Bob
	Determine which Records Personnel Assist with Off-Site Work	8 days	Wed 12/8/10	Fri 12/17/10	32SS	David,Bob,Jordan,Pa
	Determine Off-Site Viewing Facilities	2 days	Wed 12/8/10	Thu 12/9/10	32SS	Marla

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3. Analyzing Resources

- Who is going to do all the work?
- Will you need additional resources?
- How many hours is it going to take?
- Will we need overtime?

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Analyzing Resources

- Time Yourself
- Reorganization
 - 24 hours to reorganize 136 feet of files
 - 5.67 feet per hour
 - 300 feet = 52 hours
 - 2 days of 3 people for 8 hours = 48
- Carting Files
 - 15 minutes per unit
 - 32 units = 8 hours
 - 2 groups work 4 hours simultaneously

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Analyzing Resources

- Keep up appearances
- Select appropriate tasks for your team
- Look for additional resources within your organization
- Hiring temp/professional help

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4. Preparing a Budget

- Time, Quality, Expense
- Ask for what you want

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Kansas City



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Springfield



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Jefferson City



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Chicago



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Budgeting

- Documentation
- Get at least two quotes/options
- Build Your Case
- “If it was your money, would you spend it?”

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5. Re-Evaluate Your Plan

<input type="checkbox"/> Identify Materials	96 days	Thu 2/26/09	Fri 6/26/09
Identify where all materials are - floorplan	2 days	Thu 4/2/09	Fri 4/3/09
Obtain practice area support for identificatio	23 days	Thu 4/2/09	Thu 4/30/09
Identify letter v. legal files	96 days	Thu 2/26/09	Fri 6/26/09
Identify and Isolate boxes	5 days	Fri 5/22/09	Fri 5/29/09
Identify and label unmarked materials	72 days	Fri 3/27/09	Fri 6/26/09
Identify Files on 12th floor	21 days	Tue 5/26/09	Fri 6/19/09
Identify Files on 11th Floor	20 days	Tue 5/26/09	Thu 6/18/09
Identify workload - OT?	5 days	Fri 5/22/09	Fri 5/29/09

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6. Develop a Communication Plan

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Communication

- Who is this going to affect?
- Who needs to be told first?
- Who is going to tell them?
- What do they really need to know?

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Communication

- Don't forget your staff
- Regular updates/meetings
- Who are you forgetting?
 - Think outside the box
- Add Communication to your Project Plan

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Conclusion

- Be flexible
- Keep your sense of humor
- Don't take it personally
- Keep an open mind

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Questions?

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