

BACKLOG CLEAN-UP PROJECT – RESULTS

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Backlog Project -Description

What is a “Backlog” Schedule?

- ❑ A schedule more than two fiscal years old
 - ❑ FY 2009 and older for last fiscal year
 - ❑ FY 2010 and older for this fiscal year

Backlog Project -Description

What was the Backlog Project?

- 60-day Focus on FY09 or older Backlog Schedules
 - May 7th to July 6th
 - Continued work on these schedules through end of Fiscal Year

Backlog Project -Results

- 210 backlog jobs at start of FY 2012
- Goal = 22 remaining
- Results = 29 remaining
 - 86% reduction in backlog schedules on hand

Backlog Project -Results

- Of those 29 remaining:
 - 4 are expected to be signed in October.
 - 2 are in extensive internal NARA review discussions
 - 5 have complex issues and may remain in backlog
 - 18 jobs remaining are actively being worked on, several of which may be completed by the end of the calendar year.

Backlog Project –Lessons Learned

- Quality In = Faster Throughput
 - ▣ Improve quality of incoming schedules
 - Quality Control Checklist: Handout
 - Designed to help Records Officers and/or their designee to QC schedules prior to submission
 - Recapitulation of existing requirements/nothing new
 - Will also be posted on our blog and sent via RM Communications

Backlog Project –Lessons Learned

- Improve quality of incoming schedules –Quality Control
 - ▣ Webinar on Quality Control – November/December

- Other Training
 - ▣ Looking at developing scheduling workshops
 - ▣ Slide decks and other information on conducting inventories

Backlog Project –Lessons Learned

- Return of Substandard Schedules
 - Schedules not meeting basic standards per QC list may be returned without action
 - Reasons will be provided
 - Suggestions for improvement
 - Meetings, trainings, workshops with individual agencies to improve schedule submission

Backlog Project –Lessons Learned

- Inactive Schedules Returned Without Action
 - Appraisal visits, Revisions, Questions
 - Goal = turnaround within 40 days
 - Schedules may be returned due to lack of responsiveness
 - Make sure ready for appraisal visits

Backlog Project –Lessons Learned

- Additional Appraisal Staff
 - ▣ Hired Two in September
 - ▣ Lost Two in September
 - ▣ Petitioning NARA Management for Additional Staff
 - ▣ Crosstrainers contributed substantially to backlog reduction

Backlog Project –Lessons Learned

- Process Improvement
 - As part of Presidential Records Management Directive
 - Multi-year project to look at streamlining process
 - Improve Internal Review Process – roll out this winter

Backlog Project –Lessons Learned

□ Jump Start

- Need to Prevent Schedules from Entering Backlog
- Need to Look at Next Year's Backlog Now
- Easy Schedules: Knocking out Quickly, Even if Not in Backlog

Current Backlog

- Current Backlog = 90 Schedules
 - ▣ Down over 50% from last year's level
 - ▣ Jump Start: many handled last fiscal year

Addressing Current Backlog

- Plan
 - Continue to work on FY10
 - Start working on FY 11 backlog this year (132 schedules)
 - 60-day focus in January and February
 - Goal: start FY 11 with minimal backlog (exact goal TBD)

Questions

Questions?

Call Appraisal Archivist or Team Supervisor

- <http://www.archives.gov/records-mgmt/appraisal/>

After BRIDG Meet and Greet

- What:
 - ▣ Meetings Rotating Through Appraisal Teams
 - Held in the afternoon after BRIDG Meetings
 - Beginning this afternoon at 1pm for Appraisal Team Three (Kate Flaherty's Team)
 - Includes Commerce, Agriculture, Interior, Education, Health and Human Services, EPA, GAO, NASA and others
 - ▣ Similar to Ones Held Last Year

After BRIDG Agency Meetings

- Who
 - Appraisal Team Supervisor, Appraisers
 - Federal Record Center Account Reps
 - Mike Carlson for ERA
 - Representative from Textual Accessioning
 - Agencies who fall under the designated Team for that day

After BRIDG Appraisal Meetings

- Where
 - ▣ In “presidential rooms” upstairs (where coffee hours are held)

- When, 1pm day of BRIDG:
 - ▣ October 17: Appraisal Team Three
 - ▣ December 6: Appraisal Team Two (IC, State, EOP, SSA, and others) **AND** Appraisal Team Four (DoD, DOE, Labor, Transportation, VA)
 - ▣ February 13: Appraisal Team One (DOJ, Treasury, DHS, and others)

After BRIDG Appraisal Meetings

- Why?
 - ▣ Chance to meet face-to-face with Appraisers and Account Reps
 - ▣ Chance to meet with ERA and Accessioning Representatives
 - ▣ Visit with other agency RM personnel as well

- Questions?
 - ▣ Contact Appraisal Archivist or Appraisal Supervisor