**Recordkeeping Requirements**

**Project Plan**

**What steps will you take?**

1. Review resources from information governance boards, oversight committees, and communities of interest.
2. Identify recordkeeping requirements.
   1. Meet with unit management
   2. Research general RM requirements
   3. Gather sources docs such as record schedules, inventories, and file plans
   4. Meet with unit staff to determine what policies they follow
   5. Look at the business process
3. Document recordkeeping requirements.
   1. Write a first draft of the requirements doc
   2. Unit manager reviews draft requirements doc
   3. Revise and share second draft with unit staff for review
   4. Revise and share with unit manager for final review
4. Issue the recordkeeping requirements document.
   1. Create a unit RM manual that includes the new requirements document
   2. Distribute the unit RM manual to unit staff
5. Provide implementation training.
   1. Create training
   2. Provide training

**What information will you need to gather?**

1. General RM requirements (includes statues and regulations)
2. Records schedules, inventories, and file plans
3. What policies the unit follows

**Who will you talk to?**

1. Unit manager
2. Unit staff

**What sources of information will you consult?**

1. NARA RM website (e.g., policy, universal ERM requirements)
2. Agency records schedules, file plans, and records inventories
3. Any BPA information available.

**What will your review process be?**

1. Unit Manager and Unit Staff provide input.
2. Unit Manager reviews
3. Unit Staff reviews
4. Back to the Unit Manager for final approval

**What training will you provide?**

1. Set up a kick-off meeting and provide some brief background info and point people to the online module.
2. An asynchronous online module
3. Set up a meeting to answer any specific questions people may have