#### National Archives and Records Administration

Assignment:

Records Management Email Policy

# Instructions

Use the following questions to begin thinking about your own agency policy for managing email records.

When you have completed this worksheet, submit it to your course instructors for feedback.

# Step 1: Draft a project plan

Gather information that will help you decide what direction to take.

## Step 1.1: Determine the policy’s audience.

Imagine that you are about to work on a new policy for your agency. What parts of the agency are going to be covered by the policy? If you are in a large department, will the policy cover all of the components or just headquarters?

List who will adhere to the new policy

1.

2.

3.

4.

## Step 1.2: Identify project stakeholders who will assist you.

Imagine that you are about to schedule a meeting with your Senior Agency Official for Records Management (SAORM) and other senior leaders and stakeholders.

Who should help guide the development of your new email policy? List at least three major stakeholders:

1. Senior Agency Official for Records Management

2.

3.

4.

## Step 1.3: Identify the project’s scope, goals, needed resources, deliverables, and milestones.

Write a short summary of the email policy project.

Scope:

Goals:

Needed Resources:

Deliverables

Milestones:

## Step 1.4: Draft a project charter and submit it to management for approval.

Who should review and approve your project charter?

1. Senior Agency Official for Records Management

2.

3.

4.

## Step 1.5: If charter is approved, then write the project plan.

Name at least three factors that will be major considerations as you write your project plan.

## Step 1.6: Recruit the project team and assign tasks.

Who are the team members that you will need to develop the email policy?

# Step 2: Create an email policy resource repository

Now, you’ll collect information that you need to write the draft policy.

## 2.1 Inventory and review current agency records management policies and records schedules for relevant information that can be used for the email policy.

Consider what you know about your records management program.

What other information will you need to make sure the email policy will work for the agency?

## 2.2 Review all NARA bulletins, regulations, and other guidance related to email.

List three NARA references that you will use to draft the email policy.

1.

2.

3.

## 2.3 Review OMB A-130, the E-Gov Act, FOIA, the Privacy Act, and other Federal laws and regulations relating to electronic communications.

List three considerations from these references that you will use to draft the email policy.

1.

2.

3.

## 2.4 Review the email policies of other federal agencies, such as EPA, OPM, and DOE.

What agencies have email policies that might be similar to your agency?

## 2.5 Review the current email system in place, how it is being used, how it handles records, and capabilities.

Describe how your current system supports managing email records?

## 2.6 Compile all the guidance identified in Steps 2.1 - 2.4, then cut and paste those portions relevant to email management into a comprehensive document that can be used as a reference resource.

## 2.7 Schedule meetings with stakeholders to review resources, content and answer questions.

What areas would you discuss with stakeholders at this point in the project?

## 2.8 Store the resource in a shared drive or similar repository accessible to staff developing the policy.

# Step 3 Outline the proposed policy and Write the draft

## 3.1 Use bullet points or similar method to document what will be included in the policy.

What topics will you include in your policy?

# Step 5 and 6: Coordinate review of the draft and Issue the final policy

## 5.1 Identify who will review the draft policy

With whom should you share your draft policy? List at least 2-3 people, offices, or groups who should review the draft plan:

## 5.2-5.6 Revise the plan, submit the plan for approval

You’ll revise your draft based on the feedback you receive. Then, you’ll submit your plan for approval. To whom will you submit your plan for approval? Briefly describe that person or group and his/her/their role here:

## 6.1 – 6.4 Publish the finalized plan

Briefly describe how you will publish your finalized policy. With whom will you share the policy? Will you post it on an agency intranet or website? How will you communicate the new policy to your stakeholders?

## Wrap-up

How could a new or updated email policy help your records program? Reflect on our own goals for your records management program and respond briefly here.