

## Archiving and Records Management

Every organization is responsible for maintaining records. The ability to organize and maintain records and archives is essential to success. records keeping will not only offer liability protection; it will also efficiency and productivity. To put it simply, maintaining records and will improve the bottom line.

With our Archiving and Records Management workshop your participants will know how to classify records, define and maintain systems, and develop a keen understanding of the importance of management.



create,  
Correct  
increase  
archives

different  
records

### Course Outline:

#### Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

#### Module Two: Understanding Records

- What is Records Management?
- Defining Records
- Archives vs. Records
- Life Cycle
- Case Study
- Module Two: Review Questions

#### Module Three: Management of Records

- What Is and Is Not a Record?
- Record Programs
- Management of Systems
- Developing Standards
- Case Study
- Module Three: Review Questions

#### Module Four: Context (I)

- Techniques for Analyzing Records
- Collecting Information
- Organizational Needs
- Legal Demands
- Case Study
- Module Four: Review Questions

#### **Module Five: Context (II)**

- Routine Process
- Creative Process
- System Analysis
- Records Survey
- Case Study
- Module Five: Review Questions

#### **Module Six: Classification**

- Functionality
- Prioritize
- Assess and Review
- Develop a Tool
- Case Study
- Module Six: Review Questions

#### **Module Seven: Paper-Based Systems**

- Arranging and Grouping
- Building Files
- Elementary & Intermediate
- Metadata
- Case Study
- Module Seven: Review Questions

#### **Module Eight: Electronic Records**

- Classifying
- Folders and Directories
- Groupings
- Metadata
- Case Study
- Module Eight: Review Questions

#### **Module Nine: Hybrid Systems**

- Routine Processes
- Creative Processes
- Design
- Limitations
- Case Study
- Module Nine: Review Questions

**Module Ten: Appraisals & Systems**

- Taxonomy of Values
- Macro Appraisal
- Strategy & Criteria
- Document & Review Decisions
- Case Study
- Module Ten: Review Questions

**Module Eleven: Record Maintenance**

- Paper
- Electronic
- Create Archives
- Conversion
- Case Study
- Module Eleven: Review Questions

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations