



Planning and Evaluation Tracking

College Year: 2010-2011

Division of: **Finance & Admin. Services**

Person Responsible: **Terry Berg**

Department of: **Purchasing/Rec. Retention**

Person Responsible: **Vickie Shelton**

Purpose Statement: To lawfully maintain an active and ongoing records management program.

Goal Statement #1: To achieve 100% participation in the records management program by recruiting and training AC personnel.

Objectives/Outcomes: After making a presentation on the AC records management program, all staff who manage records that are not currently listed in the records database, will process and contribute their physical records as measured on the master account log.

Results: N=159 managers per master account log 6-6-2010

N=30 managers currently listed in RM database 6-6-2010

This is 19% of all managers that could be participating in the records management program.

Use of Results: This is a new objective statement. The training of the account managers will take place 2010/2011.

Analysis:

Plan of Action:

Goal Statement #2: Standardize labels on boxes for storage, retention, and inventory purposes.

Objectives/Outcomes: After training the personnel listed on the master account log, they will correctly identify and label their records 100% of the time according to the AC Retention Schedule. (revised 6-7-2010)

Results: Above is a new/revised objective statement.

Use of Results:

Analysis:

Plan of Action

Goal Statement #3: Standardize labels on boxes for storage, retention, and inventory purposes.

Objectives/Outcomes: By training the AC personnel to correctly identify records for storage, we'll increase compliance. An increase in compliance will be reflected in the percentage the database grows in the areas of total boxes stored, total boxes destroyed, new record series, and total users. The goal is an average 25% increase each year. (objective revised 10-09)

**Results: Prior (Oct. 03, 2007 N=Zero) (May 09, 2008 N=100% increase)
(Feb. 03, 2009 N=82% increase) (Sept. 24, 2009 N=48% increase)**

Use of Results (including improvements and revisions): The use of a database to track records is new.

Analysis: Percentages will continue to decrease as back log of stored records are labeled and added to the inventory database

Plan of Action: The figures show a diminishing % of increase as the back log of stored records is processed. We are dropping this objective statement. We are restating our objective because measuring total volume of business is no longer a valuable indicator of the effectiveness of the RM Program.