

Inventory Meetings

Get familiar with the agency, any directives, inventory form, the records schedule etc.

Have an initial meeting. It is a good idea to have operation supervisors and any others present at the initial meeting. Discuss records management briefly with Administrative Officer, Regional Administrator, and others that they want to have present. Make sure that attendees understand that records can be any format particularly paper and electronic.

- Regional Administrator
- Administrative Officer
- Legal
- Information Technology
- Human Resources

Arrange separate meetings with the different groups (see below).

The following is not necessarily the order in which the separate meetings should be held. The questions are in a more or less logical order based on duties. They do not have to be asked in this order since the conversation may direct itself. You may find areas that are not covered in this list and will need to explore them further. Make sure to take detailed notes during the interview.

REGIONAL ADMINISTRATOR

- What types of records are specific to this region?
- What types of records do you create when doing your work?
- What electronic systems do you use?
- Are there new systems being planned?
- What other types of records do you have?
- What volume do you produce each year?
- What volume do you have on hand or in storage?
- Where are these files kept?
- What records do you believe should be maintained at headquarters?
- What records should be maintained here exclusively?
- What years do you have on hand or in storage?
- How often do you access these files?
- What files would you need immediately following a disaster to continue to operate and maintain your essential functions?
- Local publications?
- Directives that are issued and used locally?
- Have you ever had to retrieve old records?
- Are there other departments other than the AO, IT, Legal, and HR that I should talk to?

ADMINISTRATIVE OFFICER

Meet with administrative officer and discuss documentation. Pertinent questions might be:

- What types of records do you create when doing your work?
- Where are these files kept?
 - Review the filing system;

- How much of the files are created electronically?
- If a fair amount is, see if there is any attempt to do e-filing.
- Are there any e-systems they use?
- Are administrative records what we would find in the various GRSs?
- If not, list what we find.
- Are there any records that might be used differently for your agencies purposes (i.e., training records that could have a longer retention than the GRS indicates)
- How long are records kept?
- Have you ever needed older records and if so, how old?
- What volume do you generate in a year?
- What volume do you have on hand?
- Are there other departments other than the AO, IT, Legal, and HR that I should talk to?

LEGAL

- What types of records are specific to this region?
- What types of records do you create when doing your work?
- What electronic systems do you use?
- Are there new systems being planned?
- What other types of records do you have?
- What volume do you produce each year?
- What volume do you have on hand or in storage?
- Where are these records kept?
- What records do you believe should be maintained at headquarters?
- What records should be maintained here exclusively?
- What years do you have on hand or in storage?
- How often do you access these files?
- What files would you need immediately following a disaster to continue to operate and maintain your essential functions?
- Have you ever had to retrieve old records?

IT

- What types of records are specific to this region?
- What types of records do you create when doing your work?
- What electronic systems do you use?
- Are there new systems being planned?
- What other types of records do you have?
- What volume do you produce each year?
- What volume do you have on hand or in storage?
- Where are these records kept?
- What records do you believe should be maintained at headquarters?
- What records should be maintained here exclusively?
- What years do you have on hand or in storage?
- How often do you access these files?
- What files would you need immediately following a disaster to continue to operate and maintain your essential functions?
- Have you ever had to retrieve old records?

HUMAN RESOURCES

- What types of records are specific to this region?
- What types of records do you create when doing your work?
- What electronic systems do you use?
- Are there new systems being planned?
- What other types of records do you have?
- What volume do you produce each year?
- What volume do you have on hand or in storage?
- Where are these records kept?
- What records do you believe should be maintained at headquarters?
- What records should be maintained here exclusively?
- What years do you have on hand or in storage?
- How often do you access these files?
- What files would you need immediately following a disaster to continue to operate and maintain your essential functions?
- Have you ever had to retrieve old records?