



# PROPOSAL KIT SAMPLE

## Records Management Survey Analysis Sample

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# STUDY

## Records Management Program Survey and Analysis

Prepared for: Susan Bowman  
Senior Analyst

Prepared by: Leigh Marmot  
Program Manager





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## PURPOSE

The purpose of the records inventory is to develop and maintain an Information Management Policy for the Records Management Program. The data captured from the survey and inventory help identify records and non-records, document the location of records, and aid in categorizing and managing the records life cycle.

Surveys and an onsite physical inventory were performed to gather basic information regarding the quantity, physical form, document type, location, storage facilities, rate of accumulation, uses and similar metadata about the records of Decker, Hubbard and Brown.





# GOALS AND OBJECTIVES

The objectives of a records survey include:

- Determine the source of content types, metadata, and purpose.
- Organize content for easy access and use in document management software.
- Clean up network file shares and free storage space.
- Identify records ready for disposal.
- Identify important records that need to be retained.
- Determine the procedures, costs and requirements for improving the records program.





## SCOPE

Decker, Hubbard and Brown would like to improve the accessibility and management of the corporate records program for the entire organization. For the purposes of this analysis and report, a physical inventory and survey of the Accounting documents was performed for paper and electronic documents. The financial records of Decker, Hubbard and Brown make up the largest volume of documents within the organization and have the most audit and regulatory restrictions. A pre-inventory survey was sent to the Business Unit Manager and followed up with a physical inventory of the identified document repositories.

The accounting department governs the company's day-by-day fiscal functions and activities. The majority of the records generated in Finance are accounting records, such as invoices, purchase orders and supporting documentation. Financial records that should be considered for retention and life cycle management include policy and spending guidelines, accounts payable, accounts receivable, audit reports, financial statements, and the documents that are the records of activities or transactions of the business.



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