Leadership ICMA 2013 Capstone Project





Comprehensive Records Management System



Team Milton



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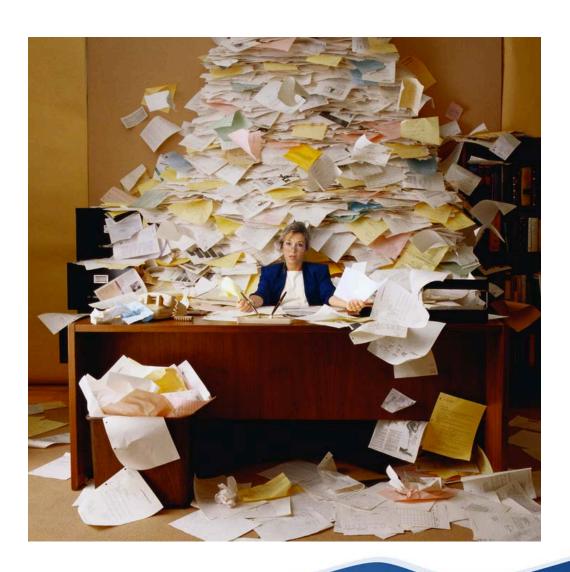


C. Seth Sumner Savannah, TN





Look Familiar?



Records management in the early days...

https://www.y outube.com/w atch?v=mipZb Za2XMk

Our Mission

- Conduct an In-Depth Analysis of Current Records Management System
- Identify Best Practices (Government and Business)
- Create a Strategic Implementation Guide





Outdated Software

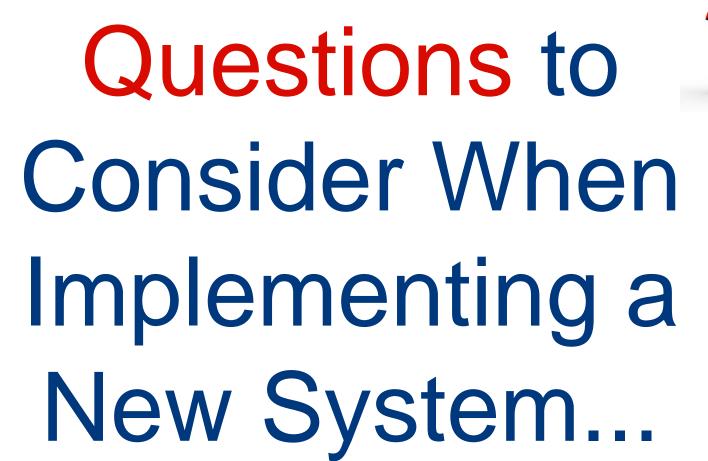
- File size limitations
- Unreliable search results
- Accidental deletion of documents
- Full text search only available with .TIFF files
- Only administrator can create files
- Incompatible with other software systems



Other Concerns...

- Defining the purpose of the new system
- Records retention







- Is it possible to go paperless?
- Who is responsible for inputing documents into the system and maintaining the system moving forward?
- How can staff avoid duplicating work that is already being done in another system?
- How will oversize plans be handled?
- Will electronic records be destroyed or retained indefinitely?
- How will native electronic files be inputted into the system?

The Good News...

- Open to using a document management system
- Interested in finding ways to create efficiencies by interfacing software
- Promote transparency internally and externally
- Develop creative solutions to staffing challenges

CAPSTONE FINDINGS AND RECOMMENDATIONS



"If we're being honest, it was your decision to follow my recommendations that cost you money."



Case Study

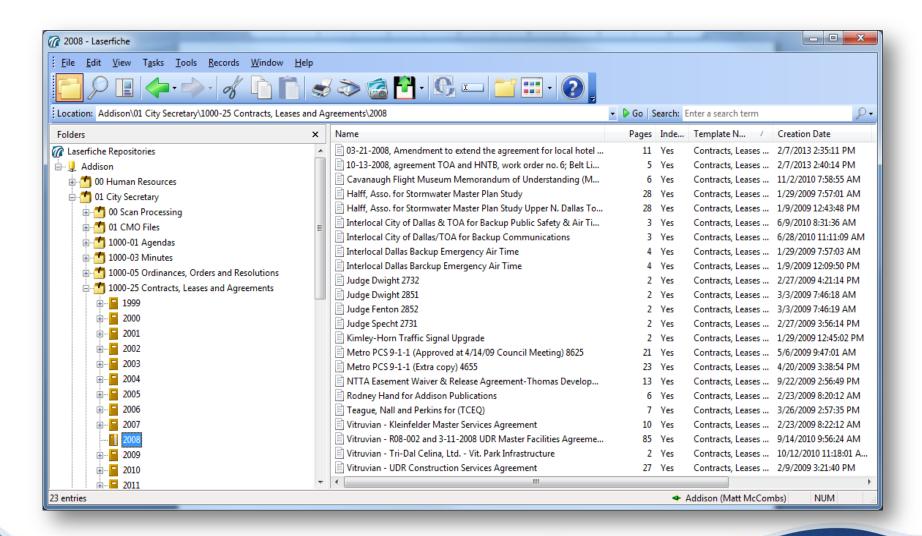




How E-Records Management Works

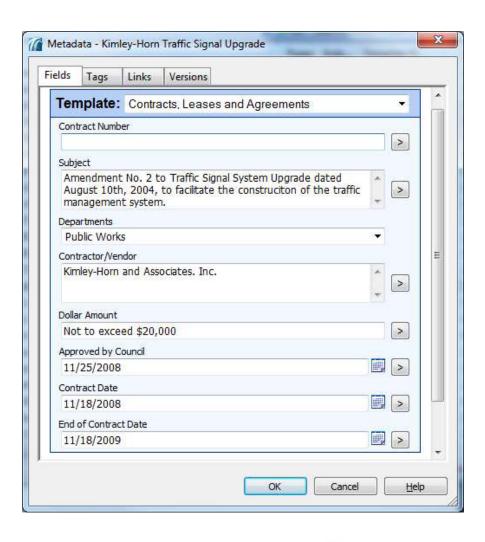
https://www.yout ube.com/watch?v =zpxb5eEO00E



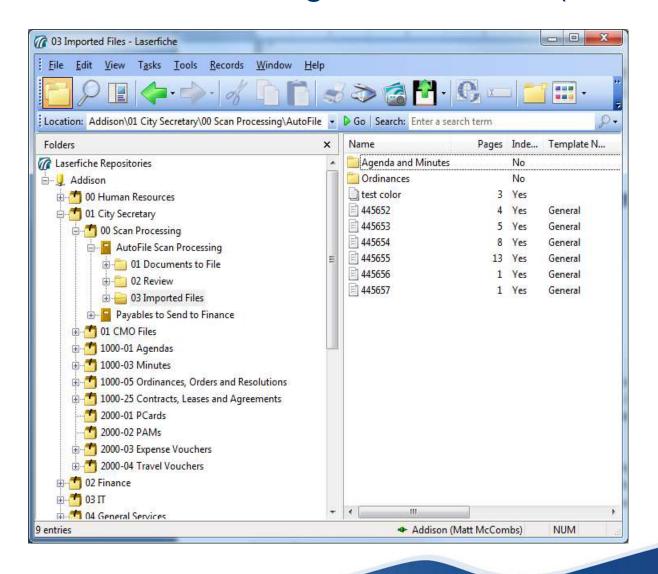




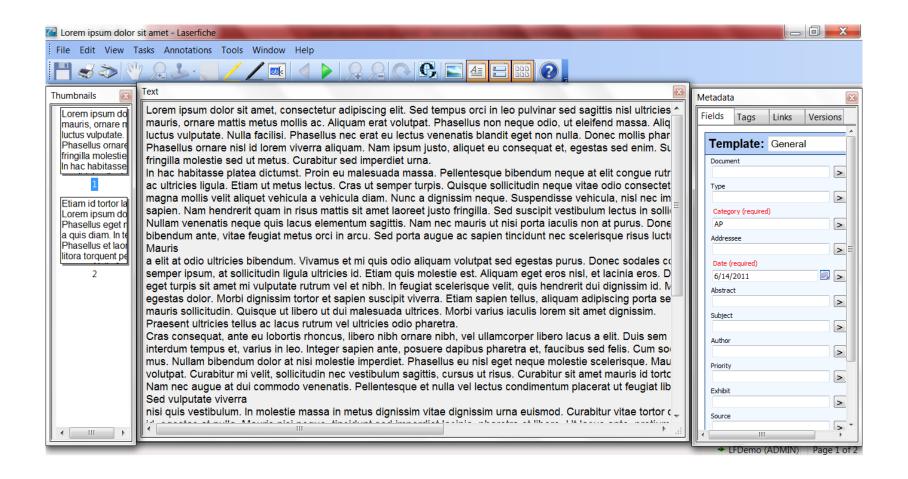
















Ease of Use

• TOP PRIORITY: CAN YOU FIND WHAT YOU ARE LOOKING FOR?





Keys to Ease of Use

- Optical Character Recognition (OCR)
- Automatic Records Destruction
- Back Scanning



Security

- Proper Document Security Is Critical
- Document Filters
- Confidential Files





System and Retention – Training and Guidelines

- Annual Seminars and Webinars
- Network Groups
- Best Practice: Follow records retention guidelines with both hard and electronic copies
- Added Efficiency: Automatic Records Destruction
- Additional Training: What do we keep and who owns the document?
- Software & Technical Support Available



TECH SUPPORT



What my friends think I do



What my mom thinks I do



What society thinks I do



What my boss thinks I do



What I think I do



What I actually do www.line.iumyblog.org





Interfacing

- Plan Ahead:
 - Identify early what systems need to work together
 - Key words and template fields can assist with interfacing
- Report Limitation: One-touch GIS system

System Maintenance

- Start Early: Decide how the system will be maintained during development
- Create Check Points: Develop and utilize system controls
- Plan for Change: Select a system with an open file format to address changing technology

Transparency

- Expanded Audiences: Electronic records are easy to share internally and externally
- Easy to Secure: Security measures make sure closed records stay confidential



- Implementation Schedule
- Sample Request For Proposal

Questions/Comments?



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