



1 the problem...

No Formal System
Ambiguous File Inheritance
Upcoming Office Relocation

Janet had recently been appointed to a top position for a specialty local government office which was first formed in 2000. Under Janet's leadership the office was growing and needed larger space.

As she and her staff of four began packing up paper files, they all realized that there was a lot of valuable information that they inherited from the previous administration. These records were never formally documented as a system and therefore were not properly transitioned to Janet and her staff.

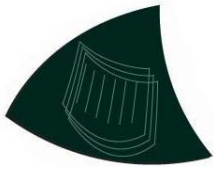
Knowing how critical access to information is, Janet did not want to move into their new office space without a solid system in place.



BEFORE

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2 how we helped...

*Onsite Inventory
Recycling & Document Destruction Identification
File Matching
Documented Protocol
Space Plan for New Office*

The office relocation date was fast approaching. Within 30 days, we worked with Janet and her team and:

- Inventoried all existing paper files in boxes as well as old file cabinets,
- Identified those documents that needed to be purged and later determining whether those documents needed to be shredded vs. recycled,
- Determined which files were for public use vs. private
- Matched all existing files from Janet's administration as well as the previous administration to the agreed-upon organizational chart,
- Developed a color-coded paper file outline that included main and sub-categorization as well as protocol for creating, naming, checking in/checking out and scanning,
- Created a schedule for quarterly purging and annual file archiving,
- Took measurements of new office space and drafted a plan for file placement,
- Recommended optimal storage solutions for various paper files based on expected use and level of security required.



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DURING

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A ADMINISTRATIVE

1. Agency 114
2. Fleet Management
3. FY 05/06 Strategic Plan
4. Group Benefits
5. Labels
6. Letterhead
7. Mailed Letters
8. Meeting Notes
9. Policy Manual
10. Requests for Approval
11. Strategic Planning
12. Web Changes 2007

C CONTRACTS

1. Altea Consultants
2. Contract Facilitators
3. Contracts 07 - 08, 2006 - 2007
4. Federal Forms
5. Invoice Forms
6. Payment Tech
7. Section 20 "Pass Thru"
8. State Forms
9. Volunteer Forms

D DOMESTIC VIOLENCE

1. Domestic Violence Study
2. DV Definitions
3. Unemployment Insurance - DV Study

F FAMILY VIOLENCE

1. Roundtable Conference 2005
2. Roundtable Conference 2006
3. Roundtable Conference 2007
4. 2006 Civil Fees Distribution
5. 2007 Civil Fees Distribution
6. Conferences/Meeting Family Violence Program
7. Family Violence Correspondence

3 value & results...

Formal Paper Records Management System

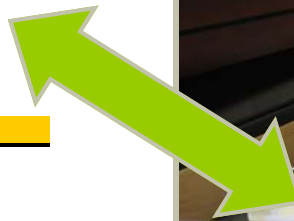
↑ File Location Clarity

↓ Office Relocation & New Setup Time

↑ Paper File Integrity, Security & Protection

As a result of the work that we did for Janet and her team, they were able to:

- Create an easy-to-follow and maintain Paper Records Management system that encompassed all information critical to their daily operational success,
- Decrease the amount of time spent in asking Vicky, the assistant, to locate information—Vicky increased her productivity by 40% and is now able to work on more projects
- Save \$35,000.00—this would have been the new assistant's starting salary whose job was to primarily maintain records
- Use their customized Work Space Logistics plan to properly pack and unpack all paper records and start working at 100% capacity in less than a week.



AFTER

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