

CASE STUDY

Office Move Drives Physical Records Cleanup

 **INDUSTRY**
Government

 **COUNTRY**
USA



EVERYONE HAS TO MOVE

Working in the same building for so many years, employees of the Portland Bureau of Transportation (PBOT) had amassed volumes of paper. With an impending move into a smaller building, employees had to take a long hard look at what they could actually take with them.

Cubicles would be much smaller in size and dedicated cabinet space was shrinking from 4-drawer to 2-drawer filing cabinets. With storage space at a premium, they had to get rid of as much as possible.

To accomplish this, they needed an inventory of the shared storage locations for all 26 groups – filing cabinets, libraries, walls, shelves, nooks and crannies. This endeavor was complicated by frequent departmental reorganizations that left storage locations containing records for more than one group across more than one location. It was onerous to figure out who owned what.

SERVICES DELIVERED:

- Content Analysis
- Content Classification
- Go-Live Support and Reinforcement
- Policy and Process Development
- Training Strategy and Curriculum

ISSUE

Impending office move to a smaller space makes it necessary to clean out physical files and records

ORGANIZED CHAOS

The Access Sciences team was asked to help with the organization and cleanup of electronic and physical records. Due to lengthy record keeping requirements, employees had an over-reliance on physical records. In some cases, there was over 30 years' worth of paper sitting in filing cabinets. An out-of-date retention schedule only exacerbated the problem. Out of sync with current workday practices, it sometimes called for records to be

kept in hard copy or microfilm. Nor was the schedule always clear on who the record owner was, resulting in records being kept by multiple groups.



By providing guidance on who the record owner was, as well as what needed to be retained versus what could be discarded, the attitude toward assessing physical records shifted from, “I don’t have time right now...” to empty filing cabinets.

Our process and tools helped facilitate conversations and helped break down the impending move into digestible and non-overwhelming tasks. Some of our key deliverables included:

- File Plans – snippets of the retention schedule that provided guidance on what records they were responsible for and how long those needed to be kept.
- Disposition Guide – walked them through the questions to ask themselves when determining whether they had to retain or could dispose of paper documents.
- Scanning Guide – for records that needed to be scanned, we provided instructions on what metadata to capture and how to prep physical records to be scanned.
- File Share Analysis – provided a high level overview of the makeup and usage of their 131 departmental file shares. See Figure 1 for an example of the analysis from one of the departments. The analysis also included file share metadata that facilitated the identification of which physical records already existed electronically.

“MOVE READY” WITH RECORDS REVIEW PROCESS AND TOOL TO TRACK PROGRESS

The original scope of work involved configuring and adopting the city government-wide electronic repository. However, once the project got underway, it was evident their most

pressing pain points centered on physical records and the upcoming move. By tweaking and prioritizing the deliverables to address the move, we were able to empower employees to get a handle on their records and get “move ready.” Putting parameters around the move project provided a methodical way to track progress on the move and ensure a more successful outcome... and no straggling filing cabinets.

BENEFIT

- ☑ **Employees know who owns which types of documents, they have a process for reviewing files, and they know which files to keep, scan or destroy, based on guidelines**

SOLUTION

- ☑ **Created inventory of items being stored and provided process and tracking mechanism for project lead**