



**Sandia
National
Laboratories**

Final Evaluation Report for the Sandia National Laboratories Recorded Information Management Training Program

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EXECUTIVE SUMMARY

The Recorded Information Management (RIM) training and guidance materials were originally evaluated to determine the current status of the training program. Specifically, how and where are training materials implemented and are members of the workforce (MOWs) regularly accessing them.

The evaluation highlighted that there is a breadth of training materials and guidance available; however, the materials are often outdated, point to old Sandia Policies, and/or are in outdated templates. Additionally, there is currently no single-entry point for training, meaning that training is available via the RIM homepage, TEDs, etc. This means that MOWs must search in various webpages or systems for training.

To ensure RIM training materials are regularly updated and are accessible for MOWs it is recommended to assign one staff member to manage the program training materials.

PURPOSE

The purpose of the evaluation was to understand the current status of the RIM training program.

The results of this evaluation clarified:

- What training materials are available
- If the training is accessible in a consistent location
- How members of the workforce (MOWs) access and implement training materials

SCOPE

The evaluation applied only to the training provided by the RIM department to the SNL MOWs. Training for the RIM staff was outside the scope of this project is:

1. EVALUATION PLAN

1.1. Methodology

The training evaluation was conducted in three phases:

Phase one: locate and catalog all RIM training and guidance material

Phase two: Interview RIM SME Staff regarding training materials available in their subject areas

Phase three: Survey MOWs who manage records to determine how they access and use RIM training materials

1.2. Key Questions

The purpose of key questions is to focus and guide the evaluation. They help determine what information to collect. This evaluation wanted to focus determining the current status of the RIM training program; therefore, the following questions were developed to help guide the focus of the evaluation:

- What training on records management is available for MOWs?
- How do current RIM staff train MOWs?
- How are MOWs using the current training materials?
- How do MOWs implement RIM requirements and guidance?

1.3. Methodologies for answering key questions

The next step in focusing the evaluation was to determine the data collection methods used to gather evidence for the key questions. The table below describes which data collection method was chosen for each question.

Question	Method
What training on records management is available for MOWs?	Archival Data
How do current RIM staff train MOWs?	Interviews with RIM SMEs
How are MOWs using the current training materials?	Survey sent to SNL MOWs who manage records
How do MOWs implement RIM requirements and guidance?	Survey sent to SNL MOWs who manage records

2. EVALUATION RESULTS

2.1. Archival Data

The archival data phase of the evaluation consisted of locating and reviewing all available training materials. A wide net was cast when looking for training materials, which included searching in the RIM Homepage, EIMS, TEDS, and Technical Library. The search was not limited by time frame or by type of training materials; therefore, some brochures or trainings found were from as early as the 1990s.

All the training was compiled into a spreadsheet (see [Appendix A](#)) which is organized by:

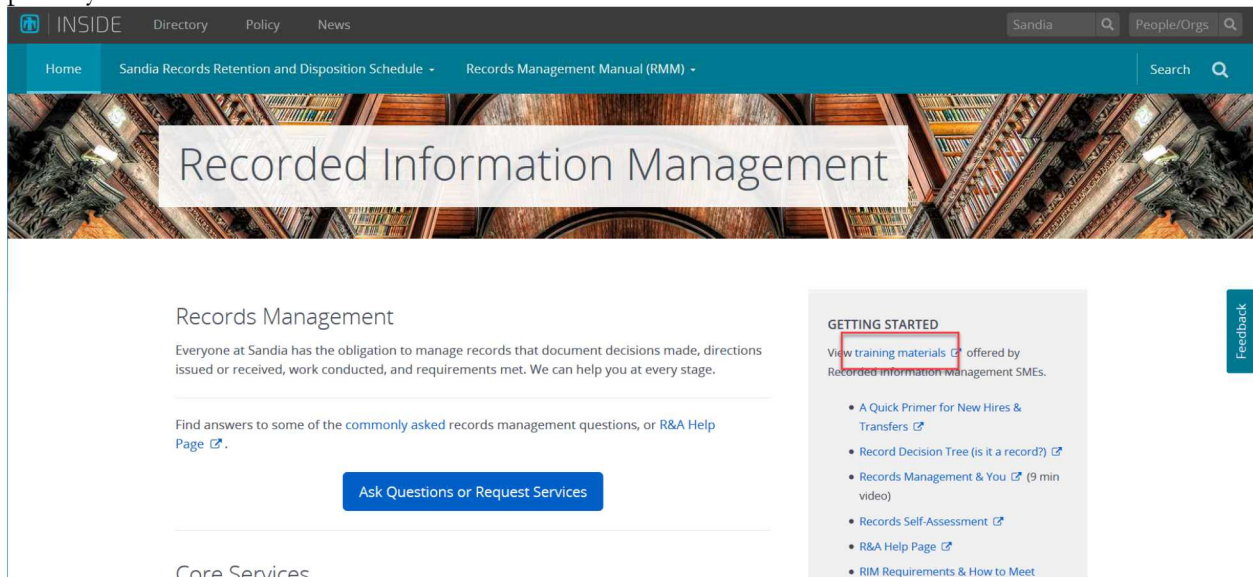
- Title
- Owner
- Entry Point Location (such as the RIM homepage)
- Link to training materials
- Date
- Type (such as PowerPoint or flyer)

Observations

While locating, cataloging, and reviewing the RIM training materials, several observations were made about the structure and organization of the RIM Training materials. First, RIM training does not have a consistent point of entry. For example, a small subset of training is available from the RIM homepage while other materials are available in TEDs or the Technical library. Secondly, the majority of the training has not be updated since 2017. This means the training materials point to outdated policy information and use outdated templates.

Some of the trainings are easy to find but are not accessible. For example, at the time of this evaluation, the Inactive Records Training model available in TEDs pointed to a broken link, i.e. the training was not accessible¹.

Finally, the link to on the RIM homepage does not stand out among the other links. While the homepage does clearly show the variety of services RIM offers, it does not appear that training is a priority.



¹ In the interview with the Inactive Records SME, it was noted that this training would be updated.

2.2. RIM Staff Interviews

Interviews took place over a two-week period with RIM Staff members who are SMEs in the following subject areas:

- History
- Archives
- Corporate Forms
- Inactive Records
- Retention and Disposition
- General Records Management
- Customer Funded Resource Center (CFRC)
- Review and Approval (R&A)
- Essential Records

For each interview, the RIM staff members reviewed a list of training materials they own via the cataloged training materials from the first phase of the assessment (see [Appendix A](#)). After reviewing the list, the staff member responded to specific questions (see [Appendix B](#)) regarding who the audience of the training is, how often training is reviewed and updated, and how often each SME received questions from the workforce. The full interview responses are in [Appendix C](#).

Observations

The interviews with the staff members revealed several areas for improvement. First, training is not updated on a regular review cycle. If any training is updated (particularly in the case of GRM or R&A), it is completed ad-hoc. There are a variety of reason for why the training is not a consistent review cycle, such as a lack of resources, competing priorities, and no clear document control procedure for RIM (with the exception of the RMM).

Secondly, training is not consistently implemented in each program, meaning that some programs provide training on a regular basis, while others do not. The main cause for this is that some areas require “case-by-case” training while others require regular training. For example, the Inactive Records training may only be applicable to those who are sending documents to Inactive Records Storage on behalf of their organization. In contrast, most MOWs will need to either use or know about R&A. Therefore, training for Inactive Records versus R&A will be implemented differently. A few positive points were revealed during the interviews with the staff. Firstly, all programs within RIM have some training guides and materials. As shown in [Appendix A](#), each program has a variety of materials with which to educate the MOWs on the various requirements and best practices of Records Management. Secondly, the RIM staff rely on the RMM to communicate records management requirements and best practices, which is then updated quarterly.

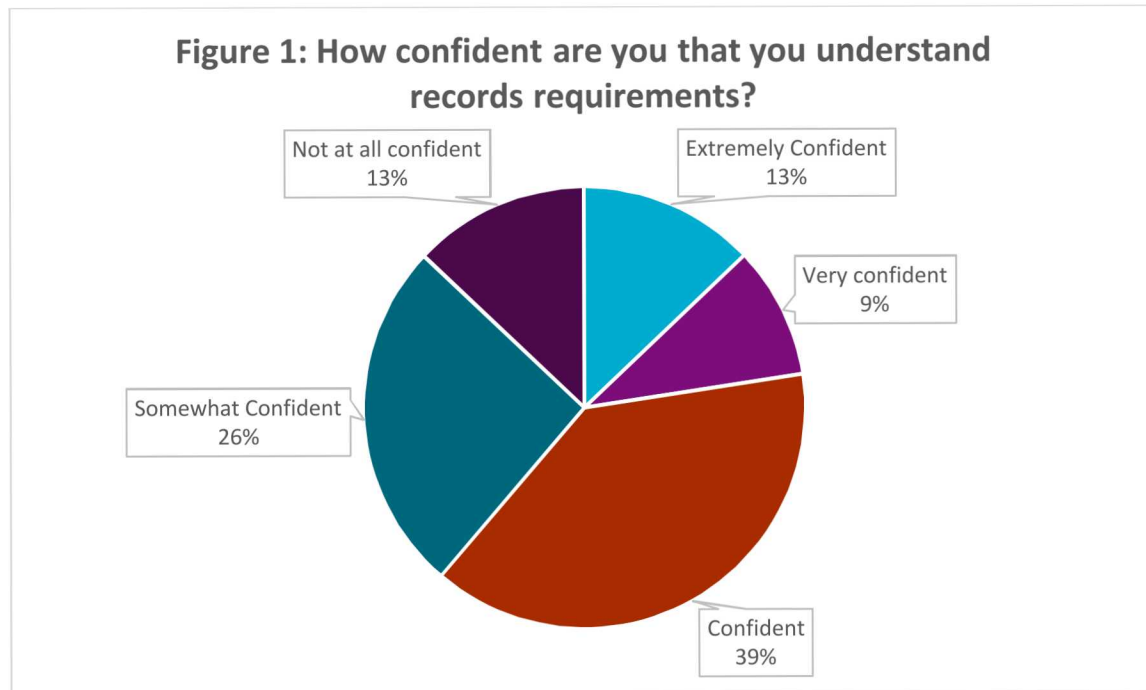
2.3. MOW Survey

A SharePoint survey was sent to a small sample of SNL MOWs. The sample of MOWs are those who manage records for their local departments and were identified via the RIM staff interviews and by a post in the Sandia Daily News. Although the sample size for the survey was small (32 participants), all SNL divisions and both the CA and NM sites were represented.

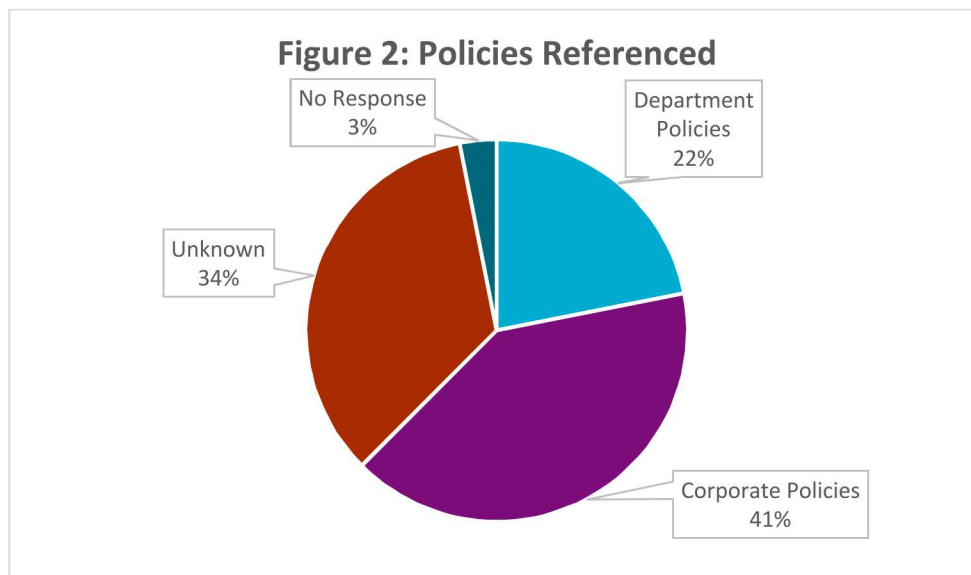
The survey consisted of two parts. Part one focused on how MOWs implement records management training and guidance in their organizations. Part two gathered information for what RIM training and guidance MOWs frequently use.

Observations

Most of MOWs who responded to the survey (see [Appendix D](#)), were identified by RIM staff as individuals who regularly manage records for their organization. Out of this group only 55% are using written guidance or materials for the management of records. Despite the lack of local training materials and guidance, 61% of the participants (figure 1) are confident in their knowledge and ability to manage records, with 13% of the overall participants feeling “extremely confident” in their knowledge.



Conversely, as Figure 2 shows, only 41% of the participants identified the Corporate Policies referenced in their local procedures. The remaining 59% of participants either use “local policies” to guide procedures and decisions regarding records management or they are unaware of any policies.



There is clearly a discrepancy between how the MOWs think they are implementing requirements and how the requirements are implemented. This evaluation did not contact the survey participants to investigate the discrepancies, but this may be starting point for future RIM training improvement. In part two of the survey, which gathered data for what RIM training and guidance MOWs access, the results demonstrated that out of the seven main areas (History & Archives, Retention & Disposition, R&A, Corporate Forms, Inactive Records, General Records Management, and CFRC), R&A and Retention & Disposition were the most commonly used programs. This slightly contrasts what was revealed in the RIM interviews. The Retention & Disposition SME stated that since the content doesn't change and there are few people who manage records, she does not receive many questions regarding the Retention schedule. This might mean that those you go to the RIM homepage seeking information related to the Disposition & Retention schedule are able to find what they need without contacting the SME.

Additional data from showed that when MOWs have questions regarding records management or any of the services, they either go to the RIM homepage or call the RIMS staff directly. This is both can mean that MOWs know where to locate the answers to their questions on the RIM Home page, or that they know who to contact when they have questions.

3. RECOMMENDATIONS

While the data revealed that the RIM program does have training available, it highlighted the inconsistency across the programs. The purpose of the RIM program is to assist MOWS in ensuring they understand their requirements for managing records; therefore, training and guidance materials should be consistent to ensure easy access and a common message.

The first recommendation is to assign one RIM staff member to manage training materials, henceforth titled “Training Program Lead”. Similar to how the RMM is managed, the Training Program Lead will be responsible for working with the staff to ensure the training materials are updated on a specified review cycle (e.g. biannually, yearly, etc.), are in the current accepted corporate templates for training, point to correct policies, and are accessible in a single location.

The second recommendation is to determine which training materials need to be updated. The Training Program Lead will work with the RIM SMEs to determine which available training materials are the most relevant and current. The Training Program Lead will then update the training by fixing broken links and moving training into the current corporate templates for training.

The third recommendation is to add a page on the RIM WordPress site that is specific for training. This page will be the single point of entry for all RIM training, no matter where the training itself resides. For example, all TEDs training will have a link on this page as will the PowerPoints that live in EIMS. The Training Program Lead will be responsible for ensuring the links to the various training work and that the site is up to date.

The final recommendation is to perform a follow-up evaluation within a year after the above recommendations are adopted. This second evaluation will review the extent to which the changes improved the RIM training program.

APPENDIX A. RIM TRAINING DOCUMENTATION

Title	Owner	Location	Link	Date	Type
Cyber Security Awareness Training (COM100)	Cyber Security	TEDs	TEDS	Unknown	LMS Module
Am I meeting Records Management Requirements?	Rebecca	2017 RM Month Workshop	EIMS	4/20/2017	PowerPoint
Corporate Archives and Scanning Services	Julie	2017 RM Month Workshop	EIMS	5/2/2017	PowerPoint
Creating File Plans and Naming Conventions	Rae	2017 RM Month Workshop	EIMS	3/29/2017	PowerPoint
File Naming Do's and Don'ts	Rae	2017 RM Month Workshop	EIMS	4/13/2017	PowerPoint
File Plans--A tool for Maintaining Records	Rae	2017 RM Month Workshop	EIMS	4/17/2017	PowerPoint
How to Find Your Record Series	Rae	2017 RM Month Workshop	EIMS	4/6/2017	PowerPoint
Inactive Records Management SNL/CA	Amanda Thompson	2017 RM Month Workshop	EIMS	4/18/2017	PowerPoint
Inactive Records Storage SNL/NM	Carla B.	2017 RM Month Workshop	EIMS	4/6/2017	PowerPoint
Review & Approval	Lee Ann	2017 RM Month Workshop	EIMS	7/26/2019	PowerPoint
Sandia Records Retention & Disposition Schedule	Karen	2017 RM Month Workshop	EIMS	4/13/2017	PowerPoint
Where to Store Your Information	Rebecca	2017 RM Month Workshop	EIMS	4/3/2017	PowerPoint
A Quick Primer for New Hires	Rebecca	RIM Homepage	EIMS	5/18/2017	PowerPoint
Record Decision Tree	?	RIM Homepage	EIMS		PDF
Records Management & You	?	RIM Homepage	EIMS	11/20/2013	Video
RIM Requirements & How to Meet Them	Rae	RIM Homepage	EIMS	10/25/2017	Flyer
Where to Store Your Information	Rebecca	RIM Homepage	SharePoint	Unknown	Webpage
Records Self-Assessment	Rae	RIM Homepage	EIMS	10/30/2018	Word Doc
Inactive Records Storage Training (RCDIRS100)	Tracy	TEDs	TEDS	5/16/2016	PowerPoint
Inative Records Storage TWD	Tracy	TEDs	TEDS	10/5/2017	Word Doc
Records Keeping Basics	Tracy	TEDs	TEDS	Unknown	ITEM NOT FOUND
Records Management 101	Micky Hogue	Technical Library	Library Catalog	Feb-01	Scanned doc
Training, Education, and AwarenessL					
Once Records Management Program's Efforts	Linda Cusimano and Anna Nusbaum	Technical Library	Library Catalog	Mar-01	Scanned doc
Promoting Records Management Efforts	Unknown	Technical Library	Library Catalog	Sep-01	PDF
Records Management Manual	Unknown	Technical Library	Library Catalog	Mar-85	Scanned doc
Sandia's Records Management Program. III, 12.0, Records: DOE-AL QAS 1.0	Unknown	Technical Library	Library Catalog	8/21/2000	Scanned doc
Sandia History Program and Corporate Archives	Rebecca/Julie	Technical Library	Library Catalog	Nov-95	Scanned doc
Records Management at the DOE National Laboratories: Sandia National Labs	Unknown	Technical Library	Library Catalog	Jul-91	Scanned doc

APPENDIX B. RIM STAFF SURVEY QUESTIONS

1. Do you have more training/guidance than what's listed on the excel spreadsheet?
2. Who is the intended audience of the trainings/guidance?
3. How often do you revise the training/guidance? Is it on a review cycle?
4. Do you use a survey or other methods to collect participant reactions to training/materials?
 - a. If no surveys, how do you implement continuous improvement?
5. What platform do you use to communicate training opportunities or guidance to customers?
6. How often do customers contact you directly, rather than reading guidance or training material?
7. What are some common questions you receive from customers that *are not* covered in training and guidance?
8. If you do not have training for your subject area, how do you ensure customers understand requirements for your subject area?
9. Are there customers you work with regularly who can recommend for a survey?

APPENDIX C. RIM STAFF INTERVIEW RESPONSE

C.1. History

Question	Response	Notes
Do you have more training/guidance than what's listed on the excel spreadsheet?	No. History talks, but not considered training.	Look on the collaborative share. Archive > Outreach (or Education and Training). EIMS training, but not currently RM training.
Who is the intended audience of the trainings/guidance?	Regular MOWs	Per policy, all MOWs have the obligation to manage records
How often do you revise the training/guidance? Is it on a review cycle?	No review cycle. Revise as needed.	How to revise things like COM100?
Do you use a survey or other methods to collect participant reactions to training/materials?	CSAT	COM100 has a survey at the end. How do we get feedback?
If no surveys, how do you implement continuous improvement?	Ad hoc	
What platform do you use to communicate training opportunities or guidance to customers?	The SDN and RIM Homepage	
How often do customers contact you directly, rather than reading guidance or training material?	Twice a week, on average	
What are some common questions you receive from customers that <i>are not</i> covered in training and guidance?	Do I have to keep it and how long? (Covered in guidance). Do I have to put my doc through R&A? (somewhat covered in training). Questions on Lab Notebooks. Copyright. Copies.	

If you answered “No” to the first question, how do you ensure customers understand requirements for your subject area?		
Are there customers you work with regularly who can recommend for a survey?	Mary Ann Cordova	Rebecca will send list

C.2. Archives

Question	Response	Notes
Do you have more training/guidance than what’s listed on the excel spreadsheet?	Corporate archives appraisal criteria (Chapter 9 of RMM)	Template for when someone asks about scanning services. Includes information on procurement and other steps. No guidance other than the chapter in the RMM--guidance is very unique, so it's hard to generalize. Working with IR to destroy boxes while also ensuring material is kept when needed. There is now a good flow from IR to Archives/History.
Who is the intended audience of the trainings/guidance?	Lab-wide staff	Communication style will vary depending on who is contacting (SMA vs Technologist). Individualized, since there are a small number of requests
How often do you revise the training/guidance? Is it on a review cycle?	RMM chapter is reviewed quarterly	

Do you use a survey or other methods to collect participant reactions to training/materials?	CSAT-and only if the presentation is formal	
If no surveys, how do you implement continuous improvement?		
What platform do you use to communicate training opportunities or guidance to customers?	Email and sometimes via phone call.	
How often do customers contact you directly, rather than reading guidance or training material?	Once or twice a month	
What are some common questions you receive from customers that <i>are not</i> covered in training and guidance?	No necessarily common questions, but people want to archive their items. Having to explain the difference between archiving and IR then linking to retention schedule. Then trying to explain the archive appraisal criteria.	
If you answered “No” to the first question, how do you ensure customers understand requirements for your subject area?	N/A	

Are there customers you work with regularly who can recommend for a survey?	Customers are usually one time users	
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C.3. Inactive Records

Question	Response	Notes
Do you have more training/guidance than what's listed on the excel spreadsheet?	Inactive Records Management training is updated, pending final confirmation. The chapter in the RMM.	
Who is the intended audience of the trainings/guidance?	OAA to the manager. OAA or project/program lead, student interns are the most likely to do the process for inactive records, but the managers need to make decisions.	
How often do you revise the training/guidance? Is it on a review cycle?	Follows the RMM process for the chapter. The Training is updated as needed.	
Do you use a survey or other methods to collect participant reactions to training/materials?	No	
If no surveys, how do you implement continuous improvement?	No feedback as of yet--improvements based on requirements and other needs.	

What platform do you use to communicate training opportunities or guidance to customers?	RMM, Records Management Homepage, recordshelp@sandia.gov	
How often do customers contact you directly, rather than reading guidance or training material?	Not often	If I do, I send them the chapter of the manual
What are some common questions you receive from customers that <i>are not</i> covered in training and guidance?	None	
If you answered “No” to the first question, how do you ensure customers understand requirements for your subject area?		
Are there customers you work with regularly who can recommend for a survey?		

C.4. CFRC

Question	Response	Notes
Do you have more training/guidance than what’s listed on the excel spreadsheet?	Nothing at this moment. CFRC is a service for customers, so there isn't much guidance for how to manage documents. They don't provide guidance for scanning or other ideas.	Diana wants Meagan to start working with customers to build file plans. Eventually

Who is the intended audience of the trainings/guidance?	Any training and guidance is inward facing for scan techs.	
How often do you revise the training/guidance? Is it on a review cycle?		
Do you use a survey or other methods to collect participant reactions to training/materials?		
If no surveys, how do you implement continuous improvement?		
What platform do you use to communicate training opportunities or guidance to customers?	Mostly word of mouth. Work is project based, so spend time with one group then move on.	
How often do customers contact you directly, rather than reading guidance or training material?	Customers call to find out something they submitted. How to search, how to fill out the webform. How to submit to inactive records, etc.	
What are some common questions you receive from customers that <i>are not</i> covered in training and guidance?	ADAM customers trying to find out how to send items for scanning.	

If you answered “No” to the first question, how do you ensure customers understand requirements for your subject area?	Not applicable.	
Are there customers you work with regularly who can recommend for a survey?	Sylvia Chavez; Fran Baca; Laura Trainor; Daena Richter	

C.5. Retention and Disposition

Question	Response	Notes
Do you have more training/guidance than what’s listed on the excel spreadsheet?	Brochures, COM100, Employee Connect video	Ad hoc training as well
Who is the intended audience of the trainings/guidance?	MOWs	
How often do you revise the training/guidance? Is it on a review cycle?	Hardly ever, doesn't change	
Do you use a survey or other methods to collect participant reactions to training/materials?	Only for the Records Management Month	If someone takes COM100 and leaves a comment

If no surveys, how do you implement continuous improvement?	Content doesn't change often enough	
What platform do you use to communicate training opportunities or guidance to customers?	Customers usually contact directly. The RIM Homepage. Any big training opportunities are communicated in the SDN	
How often do customers contact you directly, rather than reading guidance or training material?	All the time	
What are some common questions you receive from customers that <i>are not</i> covered in training and guidance?	1. Lab notebooks and 2. records turnover for separations	Karen has a one-pager she sends when customers ask for that. Maybe more content for management to address when employees are separating. Records turnover form has limited guidance for how to turnover records.
If you answered "No" to the first question, how do you ensure customers understand requirements for your subject area?		
Are there customers you work with regularly who can recommend for a survey?		

C.6. Corporate Forms

Question	Response	Notes
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Do you have more training/guidance than what's listed on the excel spreadsheet?	RMM Chapter	
Who is the intended audience of the trainings/guidance?	All MOWs	
How often do you revise the training/guidance? Is it on a review cycle?	Yearly, on the RMM schedule	
Do you use a survey or other methods to collect participant reactions to training/materials?	No	
If no surveys, how do you implement continuous improvement?	Interaction with customers directly, email or phone calls	
What platform do you use to communicate training opportunities or guidance to customers?	None	

How often do customers contact you directly, rather than reading guidance or training material?	Not often. Customers seem to know what they need to do. She asks more questions to make sure the form looks the way the customer needs it to	
What are some common questions you receive from customers that <i>are not</i> covered in training and guidance?	No	
If you answered “No” to the first question, how do you ensure customers understand requirements for your subject area?		
Are there customers you work with regularly who can recommend for a survey?		

C.7. General Records Management

Question	Response	Notes
Do you have more training/guidance than what’s listed on the excel spreadsheet?	Basic Records Requirements and how to meet them, a training that opens the door to a lot of different things. Files plans, file structures, naming conventions and managing controlled documents.	
Who is the intended audience of the trainings/guidance?	MOWs	

How often do you revise the training/guidance? Is it on a review cycle?	Not on a review cycle. Revise as each training opportunity comes up.	
Do you use a survey or other methods to collect participant reactions to training/materials?	CSATS; collecting them manually	
If no surveys, how do you implement continuous improvement?		
What platform do you use to communicate training opportunities or guidance to customers?	SDN, personal invites/correspondence, webpage announcements, porcelain press, teaser	
How often do customers contact you directly, rather than reading guidance or training material?	Often	
What are some common questions you receive from customers that <i>are not</i> covered in training and guidance?	Folder guidance (taxonomy). What repositories--what are the requirements for repositories. What do I do with legacy documents?	
If you answered "No" to the first question, how do you ensure customers understand requirements for your subject area?		
Are there customers you work with regularly who can recommend for a survey?		

C.8. Review and Approval

Question	Response	Notes
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Do you have more training/guidance than what's listed on the excel spreadsheet?	R&A Help Page, Ch. 4 in RMM, montly R&A info sessions, and occasionally an info session with tech library.	
Who is the intended audience of the trainings/guidance?	All MOWs, but specifically for submitters	
How often do you revise the training/guidance? Is it on a review cycle?	No current cycle, but usually when I need to add something or when I find a glaring error	
Do you use a survey or other methods to collect participant reactions to training/materials?	Yes, I currently use Survey Monkey to capture reactions to info training sessions. Have used this information to make changes, such as adding time to tour the R&A webpage and to submit mock tickets.	
If no surveys, how do you implement continuous improvement?		
What platform do you use to communicate training opportunities or guidance to customers?	I use the SDN and I created a calendar on the R&A help page	
How often do customers contact you directly, rather than reading guidance or training material?	Every single day.	
What are some common questions you receive from customers that <i>are not</i> covered in training and guidance?	Questions from DCs on how to review documents. Questions about how to submit classified requests (there is information, but it's not	

	clear). What documents do/do not go through R&A.	
If you answered “No” to the first question, how do you ensure customers understand requirements for your subject area?	N/A	
Are there customers you work with regularly who can recommend for a survey?	Tech library	

C.9. Essential Records

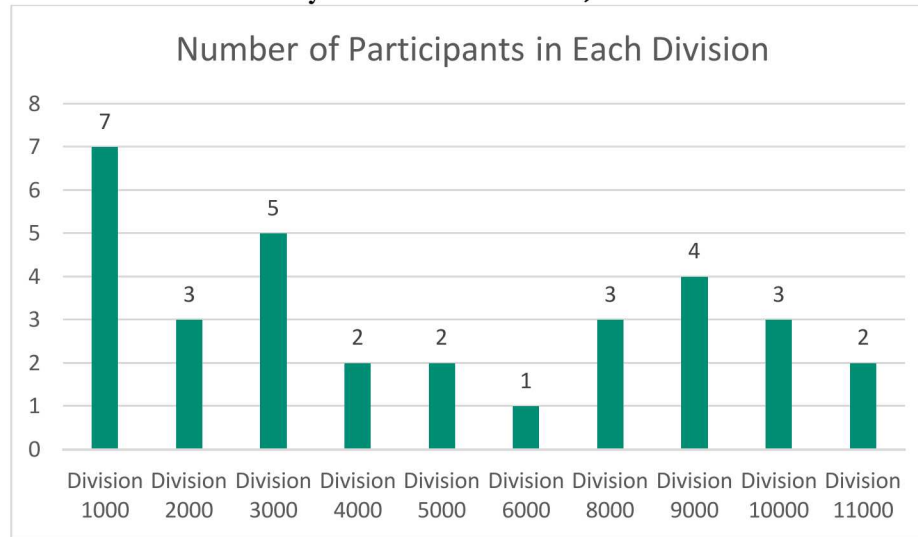
Question	Response	Notes
Do you have more training/guidance than what’s listed on the excel spreadsheet?	To my knowledge the only essential records guidance that currently exists is contained within the SNLCOOP100 SNL Continuity of Operations (COOP) Awareness TEDS web-based training/briefing.	
Who is the intended audience of the trainings/guidance?	There are multiple intended audience groups for essential records training/guidance; the audience groups consist of the following: COOP Memembers, SNL Manager/Leadership, Records Management Professionals, MOWs	
How often do you revise the training/guidance? Is it on a review cycle?		
Do you use a survey or other methods to collect participant reactions to training/materials?	The TEDS course has an end of course survey that is given to participants	
If no surveys, how do you implement continuous improvement?		

What platform do you use to communicate training opportunities or guidance to customers?	At this time the only information guidance that is given to MOWs is contained in the RMM Chapter 8 which needs to be updated.	
How often do customers contact you directly, rather than reading guidance or training material?	Since I began working on this topic, I have been asked to provide information/guidance on three separate occasions only.	
What are some common questions you receive from customers that <i>are not</i> covered in training and guidance?	Questions have consisted of providing regularity guidance on how to identify and manage essential records.	

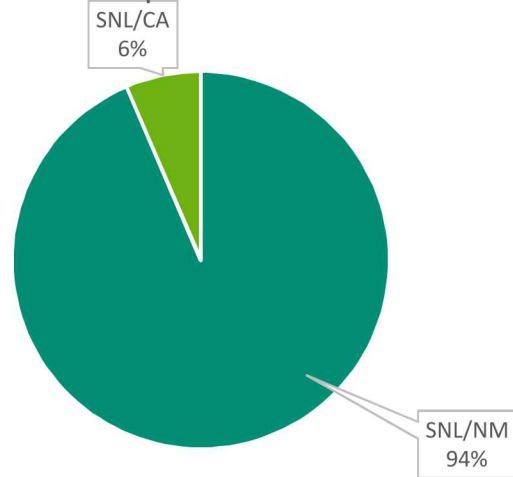
APPENDIX D. MOW SURVEY DATA AND RESULTS

Number of Survey Participants: 32

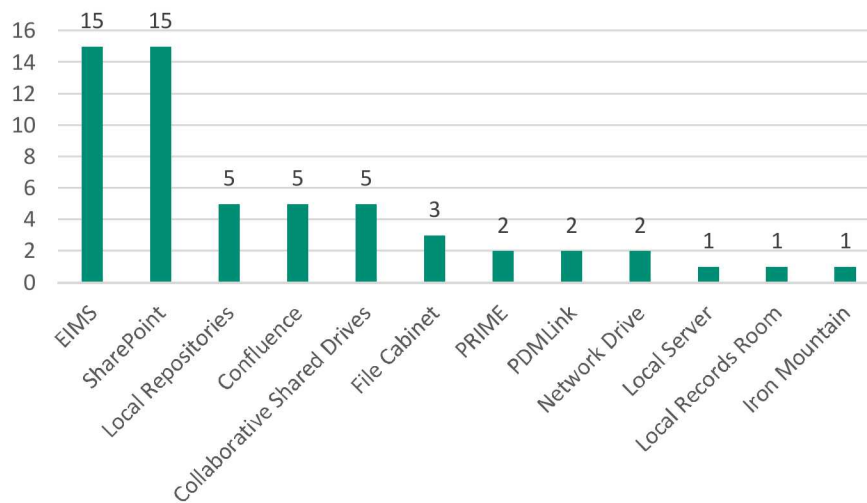
Time Frame for Survey: March 3-March 11, 2020



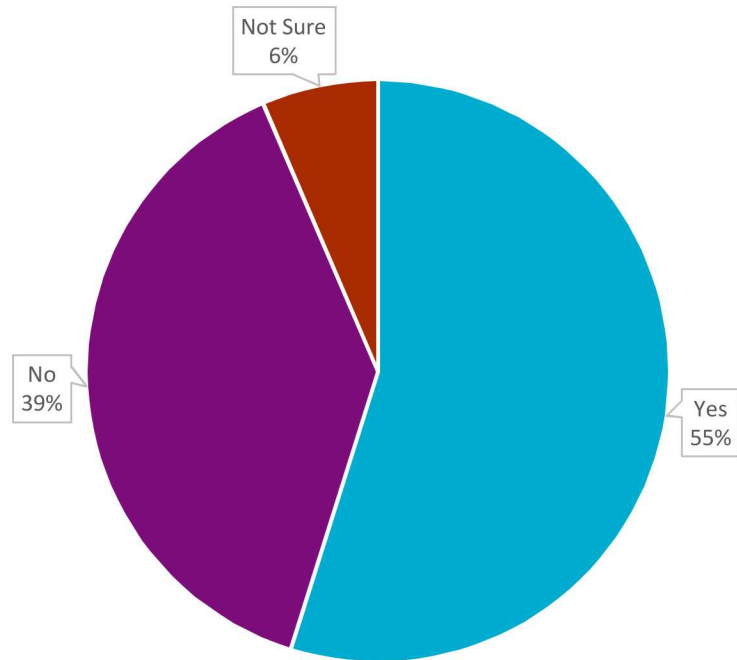
Participant Location



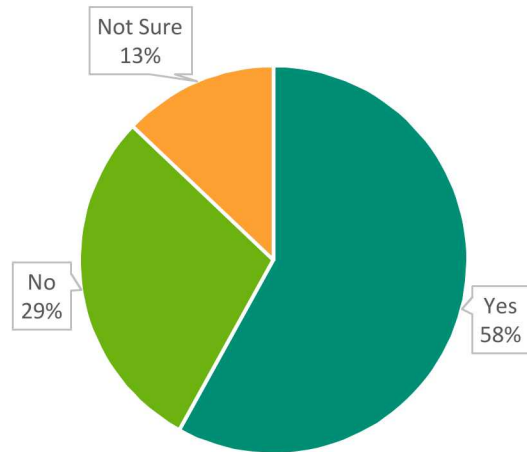
Where do you store your information?



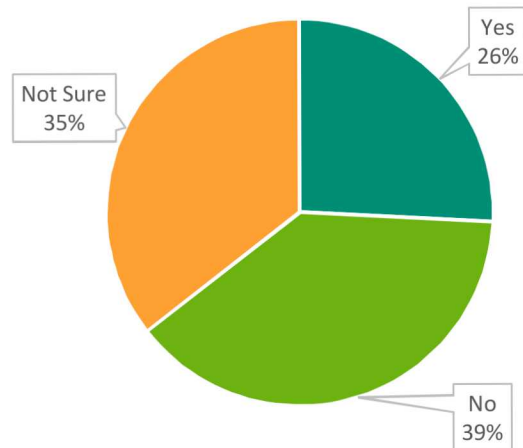
Does your organization have local trianing or guidance for records management?



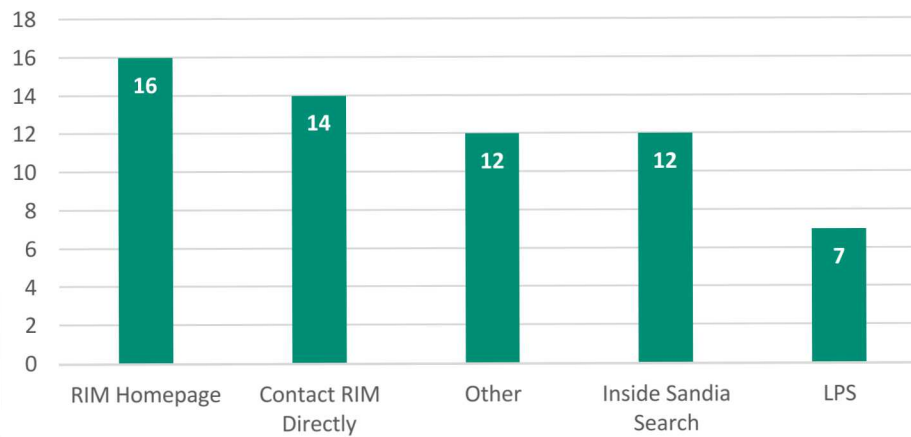
**Does your organization have on boarding training
for new hires?**



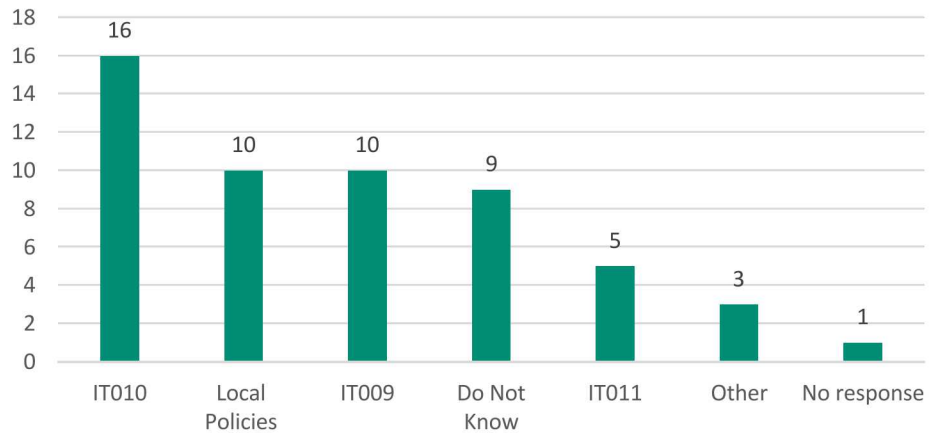
Does your on boarding include topics on managing records?



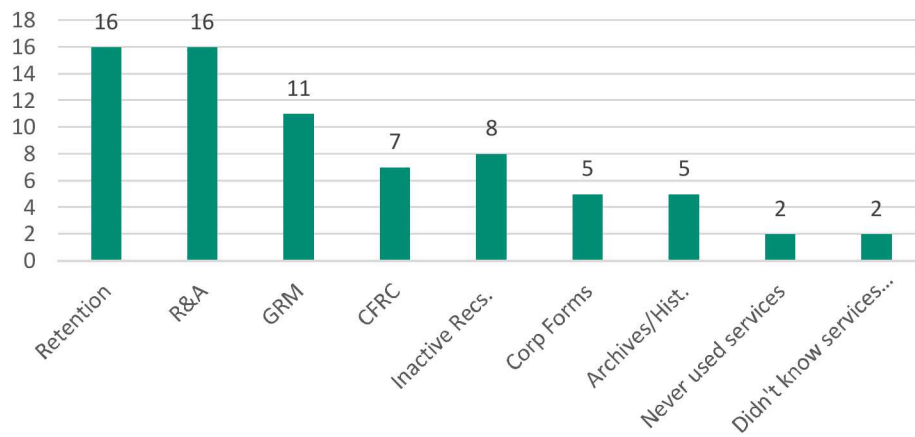
When you have a question regarding records management, where do you go for answers?



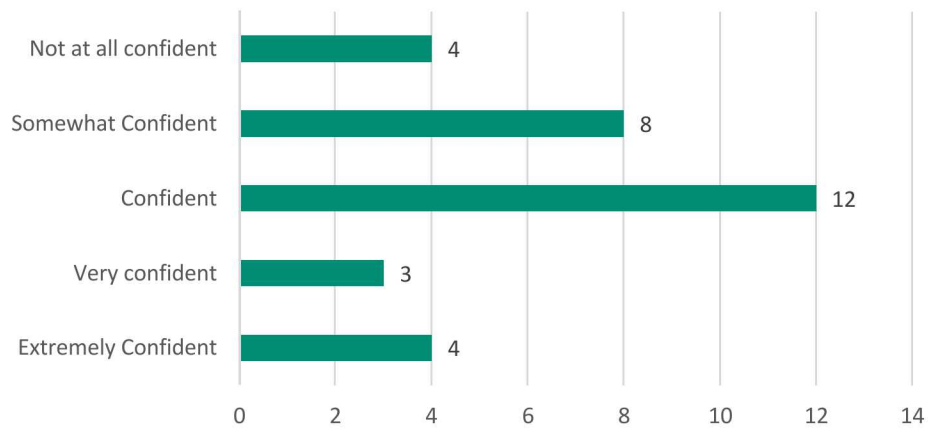
Which records management policies do you refer to?



Which Recorded Information Management (RIM) Services do you use?



How confident are you that you understand records requirements?



How confident are you that your organization follows corporate requirements for managing records?

