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| RIM Program Goals: | |
| | |
| Benefits: | |
| | |
| Costs: | |
| | |
| Completion: | |
| | |
| Senior Leadership buy-in obtained: | |
| | |
| Executive Sponsor identified: | |
| | |
| Communication Program | |
| | Key stakeholders identified |
| | Message vehicles identified <ul style="list-style-type: none"> • Web sites • E-mail • Bulletin Locations |
| | Message collaterals created & endorsed by Executive Sponsor <ul style="list-style-type: none"> • Presentations and workshop materials • E-mail templates • Posters, brochures |
| Training Program | |
| | Records & information management staff training module created |
| | Management staff training module created |
| | Legal staff training module and procedures created |
| | General staff training module created |
| Records & Information Management Policy | |
| | Policies gathered |
| | Policies reviewed |
| | Corporate Records Policy drafted |
| | Corporate Records Policy approved |
| | Communication Plan created |
| | New Corporate Records Policy launched |



| Records Retention Schedule (RRS) | |
|---|---|
| | Start-up communication created |
| | Key staff experts identified |
| | Senior management approval obtained |
| | Record information gathered: <ul style="list-style-type: none"> • Business functions and processes • Information Technology considerations • Legal / Compliance considerations • Risk considerations |
| | Build functional RRS draft <ul style="list-style-type: none"> • Framework (Function at the top level with business process as second level) • Add results of information-gathering sessions • Research retention best practices (staff interviews, industry, government regulations) |
| | Review RRS draft with each business function and gather records information |
| | Revise RRS including records and retention from business point of view |
| | Research retention and add recommendations |
| | Review RRS draft with business function owners for approval |
| | Review RRS draft with legal for approval |
| | Review RRS draft with senior management for approval |
| | Create training and communication materials |
| | Launch new corporate Records Retention Schedule |
| Records & Information Management Program | |
| | Litigation response team identified and trained |
| | Records Manager identified |
| | Procedures created: <ul style="list-style-type: none"> • Communication • Training • Litigation response • Destruction • Policy change • Retention schedule change • Audit • Vital records |
| | Vendor management in place: <ul style="list-style-type: none"> • Contracts • Records operations procedures (interactions with staff) • Audit procedures |



RIM Program Checklist

Prepared by Cadence Group

| Definitions | |
|--|---|
| Senior Leader / Executive Sponsor | Staff with responsibility for corporate-wide policy, budget and business direction |
| Key Stakeholder | Staff with decision-making authority over the business process that creates a particular set of records and staff with expert knowledge of record creation and use in that function |
| Records & Information Management Staff | Staff with direct responsibility of the management of corporate record life-cycle management. Directly responsible for implementing corporate record policy requirements |
| Records Coordinator | Staff identified in each business function that is knowledgeable in creation and management of record content within that business function |
| Management Staff | Staff with authority at the business function level. Will enable policy implementation within area of authority. |
| General Staff | Every employee |

For more information about implementing your RIM program and developing a compliant Records Retention Schedule, contact Chad Damerell, at (404) 874-0544, ext. 113, or by e-mail at cdamerell@cadence-group.com.

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