Department of Human Services / Minnesota Historical Society
Records Management Project Work Plan

Project Deliverables and Top-Level Tasks	Timeline	MHS Staff / Resources	DHS Staff / Resources
Work Plan	*March 2004*		
▪ Meetings between DHS and MHS project teams: discussion of work plan and prioritization of tasks	March 2004	Horton, Rodgers, Rounds	Crocker
▪ Approval of project work plan	March 2004	Horton	Nelson
▪ Advisory committee prioritization and review of work plan	April 2004- January 2006	Horton	Crocker
Backfile Conversion Strategy for EDMS	*April 2004-July 2005*		
▪ Meetings between DHS and MHS project teams ▪ In Process	April 2004-February 2005	Horton, Rodgers, Rounds	Crocker
▪ Work with EDMS business units ▪ HR: Completed, June 2004 ▪ Benefits Recovery: In Process ▪ Nursing Facility Rates and Policy: Completed, July 2004	June 2004-May 2005	Rodgers, Rounds	Crocker
▪ Draft and apply retention schedules ▪ HR: Completed, June 2004 ▪ Nursing Facility Rates and Policy: Completed, July 2004	April 2004-July 2005	Rodgers, Rounds	Crocker
▪ Identify policy issues ▪ "Issues for Analysis" (September 2004), In Process	July 2004-November 2004	Horton	McMahon
▪ Draft best practice guidelines on such topics as document control, document preparation, scanning, indexing, quality assurance, and document disposal	July 2004-February 2005	Rodgers, Rounds	Crocker

Project Deliverables and Top-Level Tasks	Timeline	MHS Staff / Resources	DHS Staff / Resources
Retention Schedules	*March 2004-July 2005*		
▪ Meetings between DHS and MHS project teams ▪ In Process	March 2004-January 2005	Horton, Rodgers, Rounds	McMahon
▪ Survey and list of current schedules ▪ Completed, May 2004	May-June 2004	Rodgers	McMahon
▪ Prioritize EDMS business units ▪ Completed, May 2004	May-December 2004	Rodgers, Rounds	Crocker
▪ Prioritize other business units ▪ Completed, May 2004	July 2004-July 2005	Horton, Rodgers, Rounds	McMahon
▪ Schedule EDMS business units ▪ HR: Completed, June 2004 ▪ Nursing Facility Rates and Policy: Completed, July 2004 ▪ Benefits Recovery (HCO): In Process	April-May 2004	Rodgers, Rounds	McMahon
▪ Schedule other business units ▪ MinnesotaCare: Completed, July 2004 ▪ Commissioners Office: In Process ▪ State Medicaid Director's Office: In Process ▪ Health Care Operations (including Benefits Recovery): In Process ▪ State Operated Services: In Process ▪ Deaf and Hard of Hearing Services: In Process ▪ Children, Families and Learning: In Process	April-May 2004	Rodgers, Rounds	McMahon
▪ Investigation of data warehouse environment ▪ Initial Meeting: July 2004	June-December 2005	Horton, Rounds	McMahon
▪ Research, compilation and formatting of general schedule ▪ In Process	March-November 2005	Rodgers	McMahon

Project Deliverables and Top-Level Tasks	Timeline	MHS Staff/Resources	DHS Staff/ Resources
Education and Promotion	*March 2004-January 2006*		
▪ Set up project web page	March-April 2004	Project archivist	McMahon
▪ Completed, March 2004			
▪ Maintain project web page	June 2004-January 2006	Plonski	McMahon
▪ RM 101 presentations	April 2004-January 2006	Horton	McMahon
▪ April 2004			
▪ August 2004			
▪ September 2004			
▪ Records Schedule Creation	April 2004-January 2006	Rodgers	McMahon
▪ June 10, 2004			
▪ June 16, 2004			
▪ September 2, 2004			
▪ Mini-workshops on project products	February 2005-January 2006	Horton, Rodgers, Rounds	McMahon
▪ Online forms and instructions	April 2004-September 2005	Rodgers, Rounds	McMahon
▪ How to Conduct a Records Inventory			
▪ Records Inventory Worksheet			
▪ Electronic Records Inventory Form			
▪ How to Establish a Records Retention Schedule			
▪ Records Retention Schedule Form			
▪ Records Inventory and Retention Schedule Checklist			
▪ Records Destruction Report			
▪ Online resource list for RM-related issues	March 2004-January 2006	Rounds	McMahon
▪ Ongoing			
▪ Standards and policies online	September-December 2005	Rounds	McMahon
▪ Retention schedules online (Final)	January-June 2005	Rodgers, Rounds	McMahon
▪ Human Resources			
▪ Nursing Facility Rates & Policy			
▪ MinnesotaCare			
▪ Online project minutes and progress reports	March 2004-January 2006	Plonski	McMahon
▪ Ongoing			
▪ Final report and debriefing	January 2006	Horton, Rodgers, Rounds	Nelson

Project Deliverables and Top-Level Tasks	Timeline	MHS Staff/Resources	DHS Staff/ Resources
Enterprise-Wide RM Standards and Policies	*April 2004-December 2005*		
▪ Collect and analyze input from business units, advisory committee, and educational offerings ▪ RM Operations Committee Meetings, Ongoing ▪ Steering Committee Meetings, Ongoing	April 2004-December 2004	Horton, Rodgers, Rounds	McMahon
▪ Prioritization and selection of issues ▪ "Issues for Analysis" (September 2004), In Process	October 2004-December 2004	Horton	Nelson
▪ Draft and review of standards and policies on such issues as e-mail, web content, and metadata ▪ E-mail, In Process	February-August 2005	Plonski, Rodgers, Rounds	McMahon
▪ Finalize and approve standards and policies	August-December 2005	Horton, Rodgers, Rounds	McMahon, Nelson
NHPRC Grant Application	*January-June 2005*		
▪ Preparation and submission of grant application	January-June 2005	Horton	Nelson