Agency Records Coordinator Questions List for File Plan Meetings

At Kickoff Meetings:

1. Tell me about your office, bureau, region, and/or division and what you do in the normal course of business?

2. Who are your customers that you serve or support, i.e. other agencies, citizens, etc.

3. What type of Director files do you have and what are some examples? For example, employee files, interview files, strategic planning, project files, weekly reports, etc.

4. What types of electronic systems capture data in your area's that I should be aware of to follow up with your staff about?

5. Who do you recommend that I meet and work with for each business area?

6. What business area do you prefer that I start working with first?

At Follow up Meetings:

1. What are your areas of responsibilities and the primary business functions?

2. What records are created and maintained in your business area in support of the functions and responsibilities?

3. Where are active files stored? By active, I am referring to records touched by your staff routinely as a part of daily business.

4. What type of electronic records does your area have and where are they stored, For example, shared drive, personal drive, OneDrive, SharePoint, Outlook, MS Teams?

5. Do you have boxed paper records stored in your business area or in your building? Are records stored in a secure and safe area (fire & water)? Do you have adequate agency storage space?

6. Is there a time frame when paper records were no longer maintained, and most were converted to electronic?