Records Management Assessment Objectives

- You know what records created by your historical records program are worthy of long term preservation.
- Permanent records are retained in a format that facilitates long-term preservation.
- You regularly destroy non-permanent records such as purchase orders, receipts, and routine correspondence.
- Research requests, research room registration forms and records request slips are stored securely and protected from unauthorized access.

Assessment Question	Yes	No	Needs Improvement	Areas for Improvement
Have you identified the administrative and operational records created by your repository worthy of long-term preservation?				- Survey your office records and develop a list of permanent records - Identify appropriate preservation formats for those records.
Are records relating to users of your collections protected from unauthorized access?				Find a secure storage space (e.g. locked filing cabinet) for storing researcher information. Restrict access to the information to archives staff.
Do you regularly destroy the non-permanent administrative and operational records of your repository?				- Develop a schedule for reviewing records to determine f they can be destroyed. - Document the destruction of non-permanent records.
Do you have policies and procedures governing the retention and destruction of administrative and operational records of your repository?				Draft a set of policies including a retention schedule, disaster plan, access policy, and storage and preservation recommendations for your records.