Section	Section Title and Description	Subtasks	Estimated CoR Hours	Estimated FreeDoc Hours	Onsite	FreeDoc Participants	CoR Resources
1	**Records Assessment**						
	Review records survey			8.4		Leslie/Mark	
	Travel			10	X	Leslie	
	Kick-off Meeting to identify interview schedule		1	5.25		Leslie/Mark/Bill/Garrett/Peter	Charliann, Sara, Cheryl
	On-Site Assessment Interviews		26.25	52.8	X	Leslie/Mark	All Departments
	Draft Records Assessment report and submit for CoR review			25.2		Mark	
	Deliverable Review Meeting (Remote)		2	2.1			Clerk's Office - Charliann, Sara, Cheryl
	CoR review and responsd to Assessment		40				Clerk's office
	Review and clarify any City Records Assessment comments on draft		1	1		Mark	
	Submit final Records Assessment Report			1		Mark	
	CoR Assessment Deliverable Acceptance		2				Clerk's office
1	**Section Sub-Total**		72.25	95.75			
2	**Mid-Level Inventory**						
	Travel			10		Leslie	
	Identify records series types, locations, and volumes of paper, Identification of applicable retention schedules and DANs		26	35.2	X	Mark	
	Identify records series types, locations, and volumes of electronic records, Identification of applicable retention schedules and DANs		18	35.2	X	Leslie	

	Submittal of Excel spreadsheet inventory for review and comment, Identification of applicable retention schedules and DANs		0	8.4		Mark	FreeDoc task
	Deliverable Review meeting (Remote)		2	2.1		Charliann, Sara, Cheryl	Clerk's Office
	CoR review of Inventory		120				All Departments
	Discuss and clarify comments		2	2.1		Mark	
	Final inventory with any necessary corrections or changes			2.1		Mark	
	CoR Inventory Deliverable Acceptance		2				Clerk's Office
2	Section Sub-Total			85.1			
3	Crosswalk						
	Travel			0		Leslie/Mark	
	Application of retention schedules to records series			84		Leslie/Mark/Bill	
	Drafting of crosswalk			66.15		Leslie/Mark/Bill	
	Submittal of crosswalk to stakeholders for review			1.05		Leslie/Mark/Bill	
	Deliverable Review meeting (Remote)		2.5	2.62			Clerk's Office - Charliann, Sara, Cheryl
	CoR Crosswalk review		120				All Departments
	Discuss and clarify comments		3	3.15		Mark	
	Implement any changes to final Excel spreadsheet			2.1		Mark	
	Submit Final Crosswalk Document			1.05			
	CoR Crosswalk Deliverable Acceptance		2	2.1			Clerk's Office
3	Section Sub-Total		127.5	160.12			
4	Records Management Program Vision and Roadmap						
	Travel			0		Leslie/Mark	
	Draft File Management plan			15.75		Leslie/Mark/Bill	
	Submit File Management plan for review			1		Leslie/Mark/Bill	
	Draft Records Management policy and procedures			32.55		Mark	

	Submit Records Management policy and procedures for review			1		Mark	
	Draft training plan			24.15		Leslie/Mark/Bill	
	Submit training plan for review			1		Leslie/Mark/Bill	
	Draft records disaster preparedness and recovery plan			40.95		Leslie/Mark	
	Submit records disaster preparedness and recovery plan for review			1		Leslie/Mark	
	CoR review of 4 deliverables	80					Clerk's Office
	Onsite Walk-thru Meeting of 4 Documents Delivered	2		2.1	X		Clerk's Office - Charliann, Sara, Cheryl & Maxine
	Discuss and clarify comments	4		4.2	X	Leslie/Mark/Bill	
	Review feedback and submit final Records Management Plan and Roadmap	0		8.4		Mark	FreeDoc task
	CoR RMPlan Deliverable Acceptance	2					Clerk's Office
4	Section Sub-Total	88		132.1			
5	Development of Audit Framework						
	Travel			0		Leslie/Mark	
	Draft audit framework			34.65		Leslie/Mark/Bill	
	Submit audit framework for review			1.05		Leslie/Mark/Bill	
	Deliverable Walk-thru Meeting (Remote)			2.1			Clerk's Office - Charliann, Sara, Cheryl
	CoR review of Audit Framework	40					Clerk's Office
	Discuss and clarify any comments	2		2.1		Leslie/Mark/Bill	
	Provide final audit framework			4.2		Mark	
	CoR Audit Framework Deliverablle Acceptance	1					Clerk's Office
5	Section Sub-Total	45		44.1			
	Project Total			517.17			