



Building a comprehensive Records Management (RM) Training Program

Managing by Network Case Study

Presented by BLM Idaho Records Manager, Jen Pable

Backstory



The Agenda

4

IDAHO RECORDS MANAGEMENT (RM)

Presented by Jenny Pable



[Idaho Records Management Page](#)
For Official Use Only (FOUO) Non-Records

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Agenda



Guiding Our Vision and Objectives
Federal Regulations and Policies
BLM Policy: MS-1270
Records Management
Records Custodian
Employee and Contractor
Roles and Responsibilities
Poll Survey

Recognizing
File Plan
Records Lifecycle
Disposition of Records
Location
Folder Structure
Naming Convention
Poll Survey

Q&A
Evaluation Form

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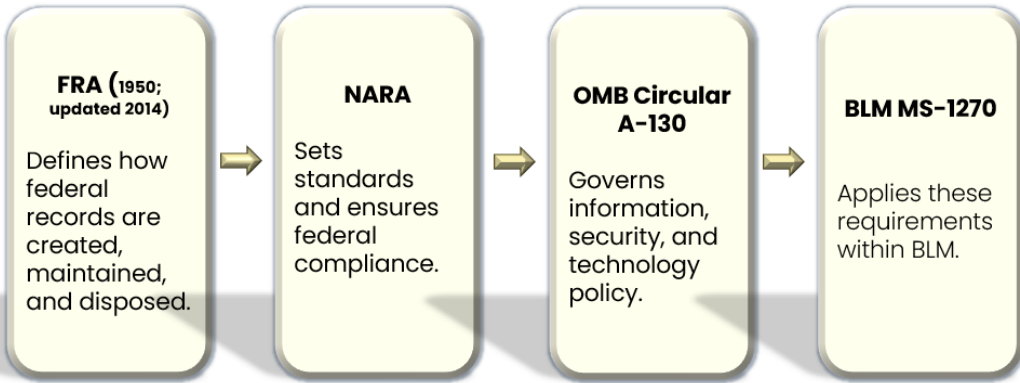


Guiding Our Mission and Objectives

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FEDERAL REGULATION & POLICIES

Why it matters



¹[NARA Basic Laws](#) ²[OMB Updated Circular A-130](#)

4

RECORDS LIFE CYCLE



MS-1270.Chap2

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BLM Challis Field Office Destroyed by Fire

Organization: BLM
 BLM Office: [Challis Field Office](#)
 Media Contact: Sarah Wheeler | 208-709-2352
 Jesse Bender | 208-534-1738

Oct 4, 2016

IDAHO FALLS, ID – In the early morning hours of Tues., Oct. 4, the Challis Volunteer Fire Department responded to the Bureau of Land Management (BLM) Challis Field Office at 1151 Blue Mountain Road in Challis. While the Fire Department worked diligently to suppress the flames, the building suffered extensive damage.

The Challis Field Office is part of the Idaho Falls District BLM. The other three Field Offices – Salmon, Upper Snake, and Pocatello – are open during normal business hours.

The State Fire Marshal has been contacted by the Challis Fire Chief and will head up an investigation into what started the fire. More information on the cause and extent of the damage will be made available as it is known.

The Challis Field Office manages 792,243 acres of public lands, mostly in Custer County. Twenty-five employees work at the office, carrying out the multiple-use and sustained yield mission of the BLM.

Continued

Building a comprehensive Records Management (RM) Training Program.

Approach



Guiding Our Mission and Object

¹H-1270-4 ²M-23-07

THANK YOU!



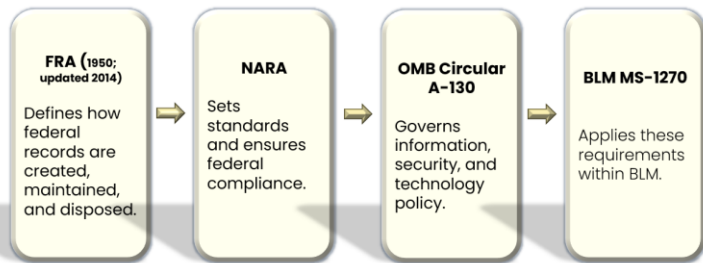
[Post Feedback Survey](#)





FEDERAL REGULATION & POLICIES

Why it matters



¹NARA Basic Laws ²OMB Updated Circular A-130

BLM POLICY: MS-1270



¹MS-1270 Chap 2-24 ²Controlled Unclassified Information (CUI) Module (M1) Training



Clarifying Federal Requirements and BLM Policy

Modernizing Recordkeeping Through EIS Understanding



- OneDrive = personal work storage
- SharePoint/Teams = program or team storage
- Shared drives = long-term organizational repositories

RECOGNIZING...

[Is It a Record?](#)

[NARA Frequently Asked Questions](#)

Records:
Report or briefing created for projects, meeting notes that document discussions or actions, forms or applications submitted by the public, spreadsheets used to track program activities, grant request, performance appraisals, contract files, purchase receipts.

Non-Records:
Copies of Letters, directives, forms, or other documents that don't show any decisions or actions taken, routing slips, and transmittal sheets adding no information to the material.
For more examples found on [NARA's website](#).

Personal Papers or Files:
Labeled as personal papers/files, employee copies of performance appraisals and personnel actions, non-work-related email to a friend, not used for agency business.

141270-4 Chap.1.8

Electronic Information Systems (EIS)

How it works

| Shared Drives | Cloud Platforms |
|-------------------------------------|--|
| Network-based storage | Microsoft 365 cloud storage |
| IT-controlled permissions | Team-managed permissions |
| Good for final, stable files | Ideal for draft and collaboration |
| Rigid folder structures | Flexible, customizable spaces |
| Minimal collaboration tools | Real-time co-editing & versioning |

145-1270 Chap.218

3dsho Intranet Governance

LOCATION

| One Drive | Shared Drive |
|---|---|
| Personal files, drafts, individual work, and quick sharing with specific people | Team projects, departments, organizational knowledge, and long-term storage |
| Owned by the individual user | Owned by the organization or team, not an individual. |
| User-controlled sharing links; access can be lost if the user leave the company | Centralized permissions, easy onboarding/offboarding, consistent access for all members |
| Personal sync (real-time), access anywhere, good for individual productivity. | Strong version control, governance, data compliance, real-time collaboration |
| Your personal desk drawer | A central office filing cabinet for the entire team |

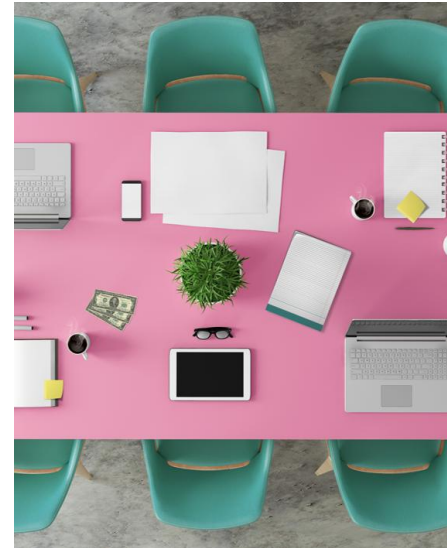
145-1270-4 Chap.1.8

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Teaching Record Lifecycle Management

- This reinforced the principles of stewardship, litigation readiness, and operational efficiency.

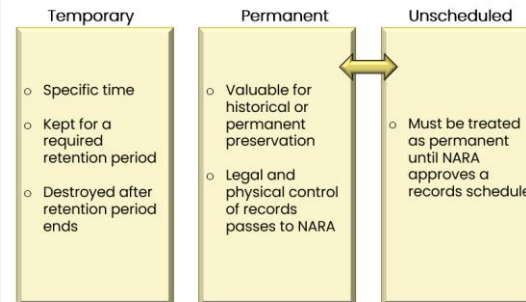


RECORDS MANAGEMENT

- ❑ Created
- ❑ Used
- ❑ Stored
- ❑ Disposed

¹DOI Talent: RIM-101 Records Management Fundamentals

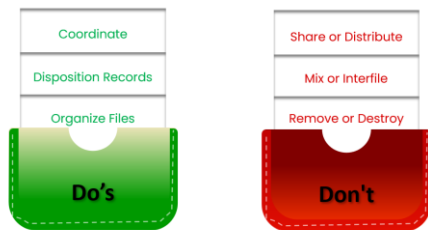
DISPOSITION OF RECORDS



¹H-1270-4 Chapter 1B(2) and D Paragraph 2



Roles and Responsibilities



DOI Talent: RM-101 Records Management Fundamentals

EMPLOYEE AND CONTRACTOR



*Alaska State Records Management-NEO PP Slide

Defining Roles and Responsibilities

RECORDS CUSTODIAN

- Designate records custodian
- Roles
- Responsibilities



MS-1270-Chapter 14(3) and (5)



Standardizing Organization Systems



File Naming Convention Format



DocType_DocVersion_Date_IncidentNumber

Standard for All Section/Unit Files with a Few Exceptions

Displayed As

WFDSS_0930_20210515_000145.

¹NWCG_Standards_Electronic_Documentation_2024-07

²File Naming Convention Best Practices

FILE PLAN

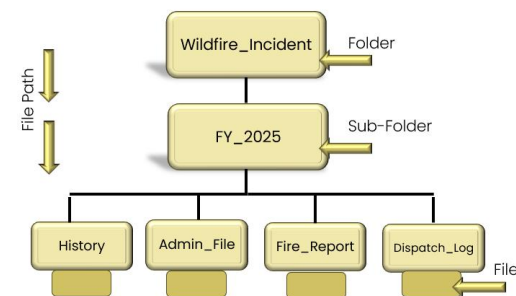
Example:

| File Number | Title/Description | Location | Date Range | Disposition Status: (Active/Inactive/Hold) | Records Schedule Item | Records Custodian |
|-------------|--------------------------------------|------------------------|------------|--|-----------------------|-------------------|
| 001 | Primary Travel Records | 5600, File Cabinet 'A' | 2017-2020 | Active | 9/4 - 3 yr. | Office Manager |
| 002 | Primary Credit/Purchase Card Records | 5600, File Cabinet 'A' | 2013-2020 | Active/Inactive | 3/39(a)(1) - 7yr. | Office M Manager |



¹Director's Office File Plan

²BUM.HQ Records Management FilePlan



FOLDER STRUCTURE

¹NARA_Bulletin_2015-04_AppendixB

²Folder Structure Best Practices

³Data Clean Up Tips

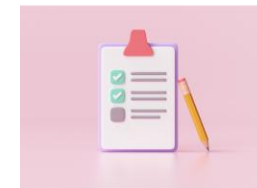
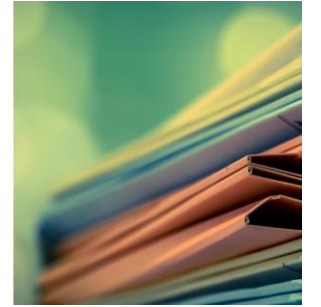


Implementation

The training was delivered through a structured 75-minute presentation with:

- Interactive navigation tools
- Embedded BLM and NARA links
- Poll surveys to reinforce learning
- Q&A to clarify program-specific scenarios

—
Q&A



—
KNOWLEDGE CHECK

Results and Impact

- **Increased Compliance and Awareness**
- **Reduced Risk Exposure**
- **Greater Operational Efficiency**
- **Strengthened Culture of Stewardship**



Guiding Our Mission and Objectives

Clear, consistent communication

Cross-program collaboration

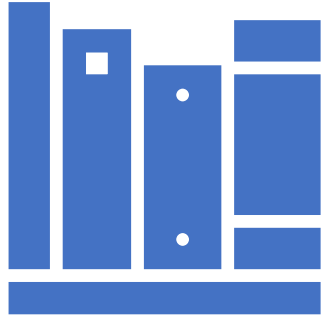
Hands-on engagement matters

Consistency is a culture, not a document

Meet people where they are

Lessons Learned

Strengthening Idaho's Records Management Culture



Conclusion