Advanced Electronic Records Institute

Charting Your Course

All Instructors

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GOALS
(ensuring continuing access)

DELIVERABLES
(5-year action plan)
Organizational Growth

1. **Acknowledge**: policies non-existent, implicit policy, or very high level
2. **Act**: implicit policy or expressed in general terms; some evidence of commitment
3. **Consolidate**: basic program, essential policies, increasing awareness
4. **Institutionalize**: consistent and systematic management; comprehensive policy framework
5. **Externalize**: collaboration inherent feature of planning; local plus virtual organization

**Showstopper**: every TDR needs a DP policy framework
Technological Growth

1. **Acknowledge**: non-existent or heterogeneous and decentralized; disparate elements
2. **Act**: project-specific and reactive decisions; ad hoc location
3. **Consolidate**: assess technology investment and requisite infrastructure, proactive mode
4. **Institutionalize**: anticipates needs; coordinated infrastructure investments
5. **Externalize**: distributed, highly integrated; extra-organizational services

**Showstopper**: inventory and control content
Resources Growth

1. **Acknowledge**: funding generally low, finite; ad hoc financial commitment
2. **Act**: often project-based funding - limited resources and duration
3. **Consolidate**: some funding and support beyond projects, but limited
4. **Institutionalize**: sustainable funding for core program areas and enhancement
5. **Externalize**: varied investment, but sustainable; possibly distributed management

**Showstopper**: identify designated funding
DP Program Balance

Expectations

Standards

Practice

Requirements

Developments