Vol 36 / Issue 2 / May 2020

THE RIMPA QUARTERLY MAGAZINE

iQ

RIMPA IN THE VIRTUAL WORLD

RIMPA EVENTS GO LIVE AND ONLINE

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FEATURE SECTION: CAREER

+
- DIGITAL SELF LEARNING
- FLEXIBLE WORKING

ADVANCING AND CONNECTING THE RECORDS AND INFORMATION MANAGEMENT PROFESSION

iQ THE RIMPA QUARTERLY

VOLUME 36 / ISSUE 2 / MAY 2020

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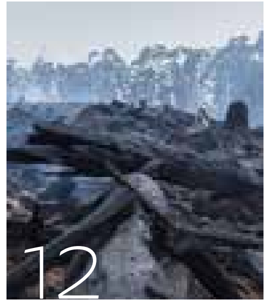
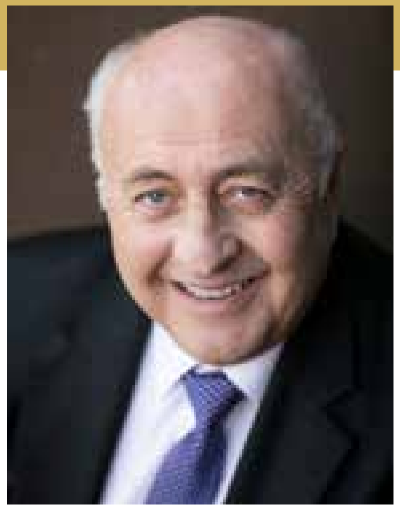
The Members Only section of the website can be accessed with RIMPA membership, or, outside Australia and New Zealand, with the purchase of an iQ annual subscription.

RIMPA WEBSITE
www.rimpa.com.au

Contents



VIEW FROM THE CHAIR



THOMAS KAUFHOLD
MRIM, CHAIR OF THE BOARD, RIMPA

"With careful management, and with your continued support, RIMPA will come out this crisis looking reasonably intact and ready to move on."

As I write this View from the Chair, the world has rapidly changed with the huge impact that the Coronavirus has had on our lives on so many different levels.

The full impact and the aftermath of the virus is yet to be felt. By the time you read this I am sure a whole new set of changes would have taken place and I am already out of date, such is the pace of change.

Imagine if the virus took place 20 years' ago, how we would have fared. Working from home would have been very difficult, if not impossible, and social interaction very limited. We are fortunate to now have massive platforms that can deliver interaction at a social and business level. Government financial support can also be delivered to millions of people literally within days of a decision being made. I very much hope that we come through the eye of this particular storm as a kinder and more generous people.

Business has been hit hard by the virus and RIMPA is no exception. In a very short period of time, the Board and staff have been working to change the way we do our business. With less revenue coming in over the next six months, or more, we are doing everything possible to reduce expenditure although are still providing a meaningful and useful service to our members.

Face to face events are no longer possible in the medium and longer term. Some of our significant face to face events, such as RIMPA Live 2020 in October, may be deferred to later this year or early next year. A final decision on this will be made in June when we have more information to work from.

Our international summit, that was planned to coincide with Information Awareness Month in Canberra this month, has been postponed to May 2021.

RIMPA is working on delivering education and professional development via virtual events. We have already successfully delivered a number of training courses remotely. A benefit I can see coming out of this is that we now have the opportunity to increase our capacity and experience in providing professional development services remotely not only to our local audiences but potentially worldwide.

This brings me to this issue of *iQ*, which has a career focus. I am sure the articles will assist you in managing your career aspirations and wanting to make a difference in the exciting profession that we work in.

Finally, I would like to express my deep appreciation for the continued support of our sponsors and for the members who have already renewed their membership and attended our virtual events, which is contributing to our cash flow. With careful management, and with your continued support, RIMPA will come out this crisis looking reasonably intact and ready to move on.

This is Karen Farrell's last edition as editor of *iQ*. Karen has been instrumental in raising the quality of the *iQ* in both content and design and I thank Karen for her contribution. Sadly, for budgetary reasons we have to bring the editorship and production of *iQ* in-house and we are thankful that due to Karen's efforts we are in a good place to do so. The good news is that Karen's talents are not completely gone from RIMPA, and we will be calling on her skills in the future.

Best wishes, and as they say, we are all in this together.

Member Update

The last part of the year is normally very quiet in membership. However, RIMPA continues to positively change and we saw a growth in membership for the last part of 2019 and the start of 2020. We are finding that many new members are joining to receive the member prices for our scheduled events and training, in addition to reaping the benefits of our pro-rata pricing which kicked in on 1 January 2020.

Our valued long-term members have also being quite active in updating their details and changing listed corporate nominees over to suit role changes within companies. Gold stars for all! We welcomed a total of 93 Corporate Nominees in the last part of 2019 and the early months of 2020.

Welcome to our new members and congratulations to these Professional Members on their upgrades:

CHARTERED MEMBERS

Alison Maconachie MRIM
Jacqueline Borrett MRIM
Carolyn Atkinson MRIM

ASSOCIATE MEMBERS

Cassandra Gorton ARIM
Kate McCowage ARIM
Tracey Sim ARIM
Paula Burke ARIM
Sian Sewell ARIM

NEW CORPORATE COMPANIES

ACT
Department of the House of Representatives
Department of Finance

NSW
Shellharbour City Council
Jigsaw Group Australia

QLD
Kowanyama Aboriginal Shire Council

NT
Roper Gulf Regional Council

SA
Glenside Health Services - Central Adelaide Local Health Network
Anglican Diocese of Adelaide

VIC
Australian Skills Quality Authority
Royal Historical Society of Victoria
Yarra City Council
Pyrenees Shire Council
North East Water
Yarriambiack Shire Council

NZ
Southern District Health Board
Power - Business Services and eCloud Business Services (PBS Australia)

NEW INDIVIDUALS

ACT
Shannon Monk
Michelle Wade
Janine O'Neill - National Blood Authority

NSW
David Grant - Decipha (a Business of Australia Post)
Elise Halliday – Camden Council

VIC
Michael Watson - Australian Jazz Museum
Suzy Goss - Arnold Bloch Leibler
Peter Toby - WorkSafe Victoria

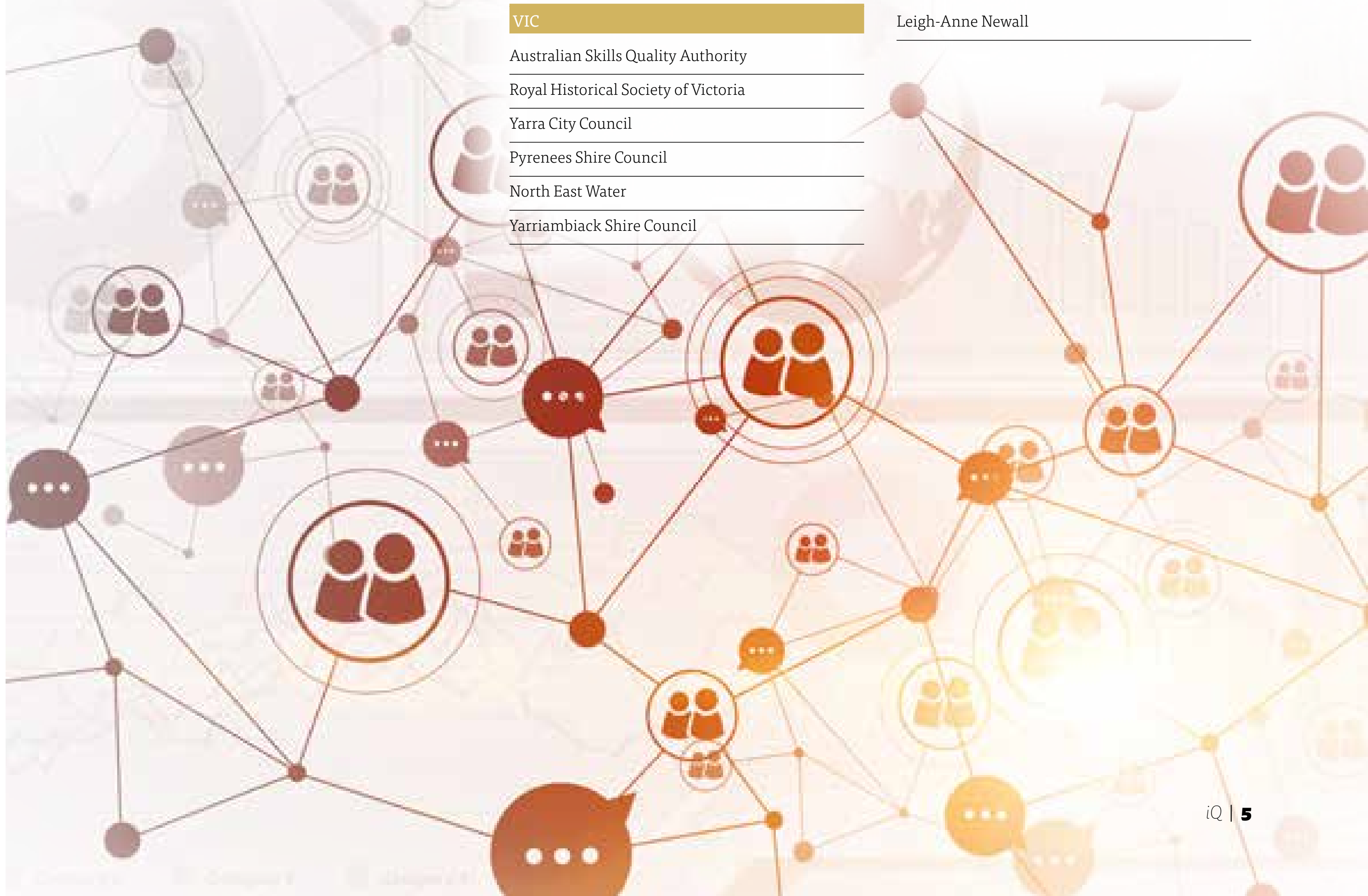
WA
Marelda Kelly - Archival Affairs

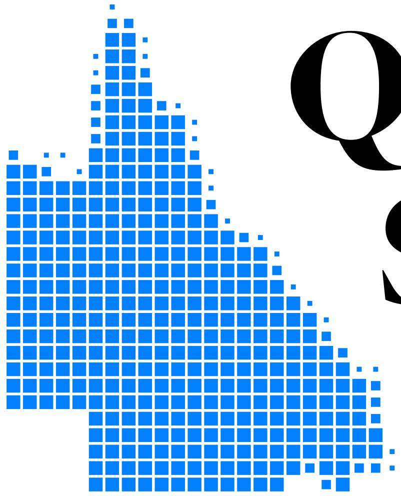
NZ
Lilie Jones – BNZ

NEW STUDENT MEMBERS

QLD
Donna Bird (1st Year Student)
Amanda Spinks

VIC
Leigh-Anne Newall





Queensland State Archives

Queensland State Archives (QSA) is pleased to announce the release of new disposal authorisations and guidance for records relevant to the proactive protection of vulnerable persons. These disposal authorisations apply to all Queensland public authorities and are published in the General Retention and Disposal Schedule (GRDS).

SUPPLIED BY QUEENSLAND STATE ARCHIVES

The release of this guideline and disposal authorisation revokes the disposal freeze for all records which are relevant to, or may become relevant to, an allegation of child sexual abuse that was released on the 1 June 2018.

FROM RCIRCSA TO VULNERABLE PERSONS

The new disposal authorisations were developed initially in response to recommendations 8.1-8.4 of the Royal Commission into Institutional Responses to Child Sexual Abuse (RCIRCSA). Considering recent legislative changes in Queensland, and in anticipation of recommendations from two current Royal Commissions (Aged Care and Disability), we expanded our advice to include all vulnerable persons and all forms of abuse.

WHY IS THIS WORK NEEDED?

The RCIRCSA showed how inadequate records and recordkeeping practices contributed to delays and failures in identifying and responding to risks and incidents of child sexual abuse. Good recordkeeping also protects the rights and entitlements of victims and survivors of abuse. Former RCIRCSA Commissioner Bob Atkinson has contributed a foreword to our guideline, emphasising the responsibility of institutions to identify the risk of all forms of abuse and highlighting how the past recordkeeping practices of many organisations failed the children in their care. Our Guideline on creating and keeping records for the proactive protection of vulnerable persons will assist Queensland public authorities meet these recordkeeping obligations and responsibilities.

YOUR CONTRIBUTION AND SUPPORT

The release of this advice follows extensive consultation undertaken by QSA over the past several months, resulting in an unprecedented level of feedback to the various exposure drafts.

Queensland public authorities indicated overwhelming support for this work. During the second round of consultation, 89% of public authorities who provided feedback indicated that the guideline provided sufficient information and practical tools for them to implement. The support for the retention periods was even greater with 94% of public authorities agreeing these were sufficient to protect relevant records.

We wish to thank everyone for their feedback, and we wish to express our appreciation for your support of this vital work. Your involvement had real input into shaping the guidance we have now released.

WHERE CAN I FIND MORE INFORMATION?

You can find the new disposal authorisations in the latest version of the GRDS. The guideline and other supporting resources can be found on the records relating to vulnerable persons page of our website. There are some great resources on this page which may come in handy when communicating to others about these new disposal authorisations. These include a comprehensive FAQ document and an introductory video that provides a great overview of this work.

QSA will continue to develop further resources throughout the year and to stay up to date with QSA recordkeeping news, follow the Records Connect blog, subscribe to our regular QCN (QSA Client News) newsletter or contact us via rkqueries@archives.qld.gov.au.

Source: Queensland State Archives

RIMPA in the Virtual World

SUPPLIED BY RIMPA MANAGEMENT

Strategically, RIMPA was planning to increase its online content and provide virtual access to events and training in response to a need to service our regional and remote members.

The Board has now brought this objective forward as the current environment has dictated a requirement to offer a new way to service all members. The plan is to offer as many virtual options as possible, to allow the RIMPA community to remain connected and informed. The ability to collaborate on issues that impact members or to have the ability to request advice is pertinent to the way we undertake our jobs right now.

The fast-tracking of virtual options for members is essential to us all right now, although this is not a short-term objective and will remain a primary member service going forward.

Virtual offerings are being offered now and into the future and are an area that RIMPA will continue to focus on to service all members. Virtual training has successfully been conducted over the past month and will account for 50% of future workshops when social distancing rules are removed.

Members can look forward to the following virtual initiatives:

WEBINARS

From late April to August members will have access to free 1-hour webinars with various topics and presenters. Webinars will be offered via Go to Meeting Webinar Technology. It is an easy to use tool and only requires members to have access to the internet and to click on a provided link. Non-members will incur a nominal fee to participate.

VIRTUAL SEMINARS

Events consisting of multiple presenters discussing a common theme will be conducted over 3-4 hours in one day (or 1-2 hours over two days), using the Go to Meeting technology. These events will incur a nominal fee to both members and non-members to attend.

VIRTUAL ROUNDTABLE DISCUSSIONS

Virtual Roundtable discussions are smaller group discussions (12-15 people) on current issues and ideas for the future sustainability of the industry.

The month of May will see a roundtable discussion conducted each week on various issues currently impacting the information industry. The discussions will be led by topic specialists and provide an opportunity to contribute to actions and ongoing strategies relating to the topic at hand.

RIMPA TV

RIMPA TV is a great name for the RIMPA YouTube Channel which provides you with on demand video resources of past presentations.

COMMUNITY FORUM

It is back! The old listserv that we were forced to decommission is returning in late April and will use up-to-date technology. You'll be able to converse with fellow members and non-members on topics/issues in real-time. The new software will allow you to participate in group conversations and topics using email.

All virtual events will be advertised and participants are required to register online using provided links.

RIMPA is focused on the ongoing delivery of virtual events and encourages all members to share ideas on what would best suit their needs.

RIMPA Community

An exciting new member benefit!

Connect, collaborate and communicate as a community online!

We know the value that RIMPA members put on networking and educational opportunities throughout the year. To build on that value, we are excited to enter into this new phase of member communications by providing RIMPA members with an environment to connect, engage and share critical industry information and best practices in real-time.

This new community will also help RIMPA communicate more dynamically with our members, by responding more quickly to your needs and receiving your input on critical industry issues.

This will strengthen our ability to implement our mission to advance, connect and encourage excellence in records and information management while advocating the values of the profession.

Through the committee and other forums, members can gather to continue discussions and problem solving and share documents that will help our industry.

RIMPA COMMUNITY PROVIDES:

- The ability to set up small, secured communities where you can converse with a selected group of people.
- Options to opt in or out of selected topics and conversation chains.
- Select daily, live or weekly notifications of conversations.
- Have access to online resource libraries of previous communications to be used when studying, writing business cases, or preparing presentations.

DISCUSSIONS
Peer-to-peer collaboration relating to trends and issues that interest you.

LIBRARIES
A place to share and locate resources relating to the information and records industry.

BLOGS
A hub to create ongoing discussions about specific points of interest.

RIMPA

The Community Forum is available to members and non-members.

Visit: rimpa.com.au

RIMPA Branch Excellence Awards 2019-2020

The RIMPA Branch Excellence Awards are presented at the Information Awareness Month events held by each Branch of RIMPA throughout the months of July and August.

The awards recognise outstanding achievements and contributions to the records and information management industry through the practical application of initiatives that promote the RIMPA Charter of leveraging the value of records as corporate assets and as evidence of business activities.

The Awards also honour RIMPA members who have made significant contributions to the advancement of our profession and who are leaders in the records and information management industry. They culminate in the recognition and celebration of organisations and individuals that implement initiatives and industry leading services that raise the visibility of records and information management across industries.

Timing: Nominations are open 1 February 2020 and close 31 May 2020 (extended due to COVID-19).

Categories: The Awards are presented to members in the following categories:

- New Professional
- Outstanding Student
- Outstanding Group
- Outstanding Individual

NEW PROFESSIONAL

Presented to a new professional to the records and information management industry who has been working in the industry for less than five years. The recipient of the New Professional award has achieved excellence in their career to date or made a significant contribution to the profession. They show a penchant for the records and information management industry and aspire to build on the core foundations to lead us into the future.

OUTSTANDING STUDENT

Awarded to a student who has achieved excellence in educational studies in records and information management. The recipient of the Outstanding Student award will have a positive attitude towards study and a passion for records and information management.

OUTSTANDING GROUP

Open to groups (other than RIMPA Committees) who have achieved excellence and made an outstanding contribution to records and information management. The recipient of the Outstanding Group award will have demonstrated distinction and a lasting, high impact in one or more of the areas: innovation, marketing, partnership and teamwork, collaboration, implementation and business benefit.

OUTSTANDING INDIVIDUAL

The pinnacle award bestowed upon an individual within the records and information industry by RIMPA Branches. This highly coveted award is the highlight of the Branch award season and is presented to an individual who has made a significant contribution to records and information management.

HONOURING CONTRIBUTIONS TO RIMPA

In recognition of significant individuals, some Branch awards have been named to honour the contributions these people have made in our industry and community.

ACT BRANCH
- Rob Barnett Award – Outstanding Individual

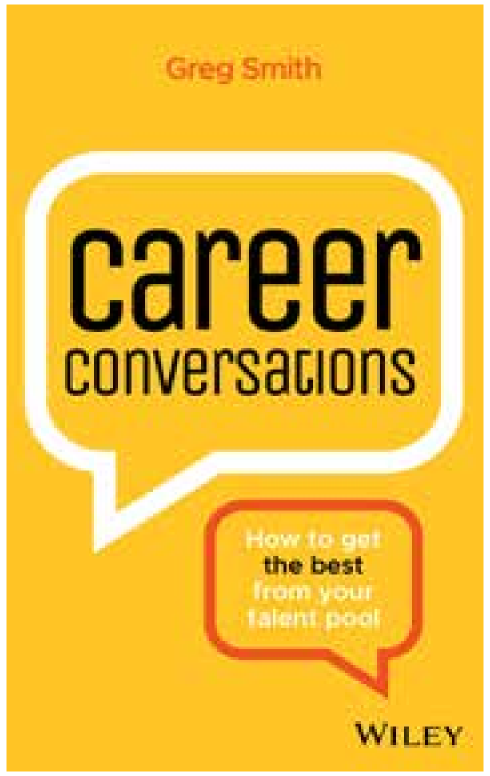
NZ BRANCH
- Dr Gillian Oliver Award – Outstanding Student
- Dianne Macaskill Award – Outstanding Individual

QLD BRANCH
- Harry Haxton Outstanding Student Award
- Harry Haxton Outstanding Group Award
- Chris Simpson New Professional Award
- Chris Simpson Outstanding Individual Award

SANT BRANCH
- Lisa McDonough Outstanding Individual Award

VIC BRANCH
- David Moldrich Outstanding Group Award
- Judith Ellis New Professional Award

WA BRANCH
- Marita Keenan Award – Outstanding Student
- Neil Granland Award – Outstanding Individual



CAREER CONVERSATIONS:

HOW TO GET THE BEST FROM YOUR TALENT POOL

BY GREG SMITH

In *Career Conversations: How to Get the Best from Your Talent Pool*, Melbourne-based career development expert Greg Smith has pulled together a succinct suite of models, exercises and templates that can be used by anyone in a management or leadership role to help their employees (and themselves) achieve career satisfaction.

BELINDA BORG

Many RIMPA members, especially those in a management or supervisory role, may find this book of value, particularly if they are struggling with the challenge of retaining and motivating employees, or perhaps feel a bit 'stuck' in their current position and would like to better understand their own career drivers and transferable skills.

All the chapters in '*Career Conversations*' have a similar layout and structure: opening with an inspired quote to set the initial tone, then closing with a succinct and well-written 'Summing Up' column summarising the key concepts and messages. Handy 'Tips for leaders' segments are peppered throughout the book, often providing useful insight for the reader on the practical application of models discussed in the chapters.

Each chapter ends with a short story outlining a real-life case study and identifying key learnings from the event, themed to the content of the preceding chapter. These stories are an inspired break in style from the main chapters, affording the reader a personal insight into Smith's past experiences. Connecting these stories to previously discussed topics works well to drive home the key message of each chapter.

The first two chapters of '*Career Conversations*' provide a very broad overview of the future of work and discuss how the idea of a 'career' has changed over time. Several different models are referenced to demonstrate how nature of career progression has changed over time, and Smith argues that this change, combined with an ever-changing technological environment means that now, more than ever, leaders need to be effective career coaches to best help their employees plan for and navigate the changing world of work.

Chapters 3 and 4 are chock-filled with templates and exercises for the reader to use to gain insights into their own career drivers and motivators, as Smith states on more than one occasion in the book that the more self-awareness one has, the better equipped they are to help others. There is also a discussion of the value of emotional intelligence, and how it directly relates to a leader's ability to hold effective career conversations. By completing all the exercises in these two chapters, the reader will develop a solid understanding of their own key career drivers, skills and attributes.

In chapters 5 to 9, Smith dives deeper into a group of essential skills and behaviors that leaders must develop to become effective career conversationalists. Topics covered include the value of a personal brand, setting career goals and creating action plans, understanding motivation and stress control, deep listening skills, and other useful communication techniques such as assuming positive intent, developing mindfulness, and adopting a solutions-focused mindset.

Finally, in chapters 10 to 13 Smith outlines practical considerations for leaders when holding a career conversation in the workplace, covering topics such as how to plan for and start a career conversation, models for structuring and guiding the conversation, and ethical principles and protocols to keep in mind (e.g. don't initiate a career conversation in an open office area!). Smith provides some useful sample leading questions to kick off a career conversation, and the final chapter of the book includes a sample career plan template that combines all the exercises from the previous chapters into a comprehensive career development resource for the reader.

This book is impressive for the sheer number of practical exercises and templates that are included. Instead of just reading about different models and methods for understanding career drivers and motivation, in this book the reader can apply these tools with immediate effect. For example, by reading and completing the exercises in just two chapters (Chapter 4: Building career self-insight and Chapter 6: The goal of goal setting) the reader can quickly develop a solid summary of their own career attributes, values, drivers and skills, along with a clear action plan for further developing their career.

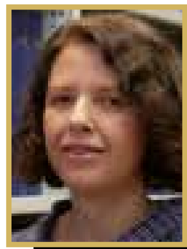
Smith highlighted many times throughout the book that the more insight a leader has into their own career drivers and motivators, the better placed they are to help others on their career path. I believe this statement rings especially true for information and records management professionals, who by nature of their work have a high number of transferable skills and capabilities, of which they may not be aware.

> **"Topics covered include the value of a personal brand, setting career goals, understanding motivation and stress control."**

I particularly appreciated the chapter on personal brand, networking and mentoring, and Smith's comment that although we cannot always control others, everyone is ultimately responsible for cultivating their own personal brand and deciding how to communicate it. Many information and records management professionals (myself included) have on occasion bemoaned the traditional organisational under valuing their expertise, however this chapter served as a timely reminder that ultimately, we are all personally responsible for shaping our own professional identity.

In conclusion, while Smith certainly doesn't break any new ground in terms of models and techniques, this book provides a straightforward and useful guide for anyone in a leadership role who wishes to nurture and develop their employees through their careers. Smith acknowledges all sources and original authors of the models and templates used in the book: an extensive reference list and further reading guide is included for readers wishing to delve deeper into any of the ideas covered.

Although targeted at leaders and managers, as such a large portion of this book is dedicated to helping the reader gain self-insight and an improved understanding of their own career drivers and motivators, I would suggest that really anyone interested in checking in on their current career satisfaction and trajectory will find this book a useful and easy-to-follow resource.



ABOUT THE REVIEWER

BELINDA BORG is the Manager, Records and Archives at Museums Victoria. Belinda's current challenges include establishing the Museums Victoria Archives and raising its internal profile as a discrete organisational resource, while ensuring the records are managed in accordance with government regulations; and governing digital information in the Microsoft 365 environment. **Contact: bborg@museum.vic.gov.au**

Bushfire Recovery

During the Christmas break the news of bushfires ravaging the country was ubiquitous. On our first day back at work after the break, the RIMPA team held a meeting and agreed that the association should work to help those being impacted by the many bushfires spreading throughout Australia

BY RIMPA MANAGEMENT

At first it was unclear what RIMPA could offer. However, after a few short discussions we resolved that we had the knowledge and skills to assist bushfire victims in salvaging records that had survived the fires. We immediately went about providing advice on how to recover copies of lost records such as household bills, passports and birth certificates. The list is endless.

In order to effectively provide these services, we needed more resources to assist. A call went out to all members, requesting for volunteer assistance for those willing to assist with document recovery, hotline services, onsite assessments, offsite storage and general advice.

The office was inundated with members wanting to volunteer from locations both in affected and non-affected areas. Well done RIMPA community – you should be proud of coming together to offer your services to those in need.

A group of volunteers was established and RIMPA began to reach out to the councils in affected areas.

RIMPA also contributed to the fire-stricken communities by recommending RIMPA's updated Personal Continuity Plan, which is an essential tool in protecting personal records in the case of a natural disaster.

It was agreed that those impacted didn't have time or the inclination to read a lengthy document so we created a condensed version of the Personal Continuity Plan as a quick guide for anyone to keep on hand. The Personal Preservation and Recovery Plan (PPRP) is in the form of a single leaflet that includes a brief personal records checklist and storage suggestions for safekeeping.

This ensures that items such as identity, family, financial, legal and property records are not destroyed and are kept safe and accessible in the case of an emergency.

The PPRP and Personal Continuity Plan were published on all social media platforms and a dedicated Disaster Recovery webpage was published on RIMPA's website for people to access and benefit from.

"RIMPA has joined with the Public Records Office Victoria and National Archives Australia to establish a set of Disaster Recovery workshops."

RIMPA contacted Blue Shield and the emergency response groups in all impacted states to offer our assistance, and provided links to our website.

Understandably, it was hard for groups and individuals to identify with RIMPA during a time of crisis. Now that the country is in recovery mode, it's time for RIMPA to step up, and assist the many individuals and businesses that are still being impacted by the disaster.

RIMPA has joined with the Public Records Office Victoria (PROV) and National Archives Australia (NAA) to establish a set of Disaster Recovery workshops to be held throughout impacted areas in Victoria and hopefully other states at the end of 2020. The workshops are designed to assist those affected with the recovery of lost or damaged documentation and to provide guidance on how to plan for the preservation of their important records for the future.

Check RIMPA's website for more information about the workshops. Visit rimpa.com.au

WWW.RIMPA.COM.AU

Personal Preservation and Recovery Plan

Personal Records Checklist

IDENTITY RECORDS
Birth Certificates, Marriage Certificates, Drivers Licences Passports.

FAMILY RECORDS
Insurance Policies, Health Records, Licences to Practice, Family Court Documents.

PROPERTY RECORDS
Contract or Lease for current Domicile, Titles for any properties owned, Vehicle certificates and registration.

FINANCIAL RECORDS
Bank statements, credit cards, safe-deposit box item list, receipts and proof of payment.

LEGAL RECORDS
Living will and testament, Durable power of attorney.

Storage Suggestions for Safe Keeping

1.) SCANNING

Essential records could be scanned and saved on a hard drive. In most cases an electronic copy is sufficient for proof. Make multiple copies and store them in separate locations, such as cloud storage.

2.) SECURE BANK SERVICES

Essential Records could be stored, for an annual fee, in a bank using a Safe Custody Service (Packet Storage) or in a waterproof and fireproof Safe Deposit Box.

3.) HARD COPY RECORDS STORAGE

A simple and relatively inexpensive solution is to store your records at home in a safer way, such as:

- Keep important records together
- Store records in a custom polypropylene archive box.
- Store the archive box in a location which is within the main home, at least one metre off the ground and can be easily accessed during an emergency.

RECORDS AND INFORMATION MANAGEMENT PROFESSIONALS AUSTRALASIA PRESENTS

RIMPA LIVE 2020

RIMPA Live is THE networking event for industry professionals. The three-day conference will feature esteemed keynote speakers, thought leaders and architects of change to inform you about all the latest industry developments.

Hundreds of delegates will descend on **Canberra from 12-15 October 2020, at the National Convention Centre,** to broaden their industry knowledge, receive professional support and be inspired by new and innovative ideas.

THE CONFERENCE WEBSITE AND REGISTRATION ARE NOW LIVE.

VISIT RIMPA.COM.AU

RIMPA

NOTE: At the time of going to print, the RIMPA Live 2020 convention will be proceeding as a live event at the National Convention Centre in Canberra. Pending further review and consideration surrounding COVID-19 and following the advice by the Australian Government, RIMPA will decide (three months in advance) if the event will take place face-to-face, virtually or be postponed to a later date. Further details and terms and conditions with respect to refunds and the status of the event will be updated regularly on RIMPA's website.

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RIMPA Live 2020 'Beyond Digital Continuity' brings together industry experts from around the globe who will showcase the various ways the profession is approaching and moving beyond...

DIGITAL FUTURISM AND LEADERSHIP
Exploring the approaches organisations are taking to enhance current practice.

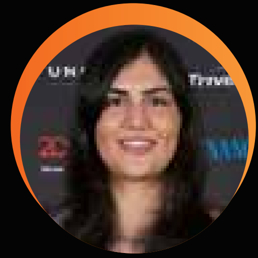
INFORMATION AND DATA MANAGEMENT
Keeping pace with the ever-increasing amount of the future needs for the industry.

ENHANCING SKILL SETS
Providing practitioners with their very own toolbox to move beyond, digital continuity.

SNEAK PEAK - KEYNOTE SPEAKER

STEVE SAMMARTINO
Motivated futurist who loves converting technology into actionable strategy.

KERRI POTTHARST OAM
One of Australia's most popular female sporting personalities.



CAITLIN FIGUEREDO
Award-winning social entrepreneur and global activist.

DAVID FRICKER
Director-General, NAA, International Council on Archives

Over three days, delegates will dive deep into learning while connecting, collaborating and catching up with colleagues.

With keynotes, panel discussions, professional development workshops, over 30 industry experts and Vendor Insights Q & A sessions, held in four new learning spaces, delegates will be flat out deciding what to attend.

CONFERENCE PROGRAM

Monday 12 October

Workshop: Skills for Digital Information Leadership RIMPA Member based workshop. Facilitated by Janine Morris and Peta Sweeney.

10.00am: Pre-Convention Tours/Activities

3:00pm: Delegate Registration Open.

3:00pm: RIMPA Live Trade Exhibition – Doors open.

4:00pm: Special Interest Group NOOBS session.

6:00pm: Welcome Reception sponsored by Micro Focus.

Tuesday 13 October

7.30am: Breakfast vendor presentation: Selling Value: 5 Lessons you can take from singing in an opera. Presented by Alyssa Blackburn, AvePoint.

8.45am: Official Convention Opening.

9:30am - 4:00pm: RIMPA Live Convention sessions, keynotes, workshops and round tables.

9:30am - 4:00pm: RIMPA Live Trade Show Open.

6.30pm - 11.30pm: RIMPA Live Black-Tie Gala Dinner and Awards Spectacular, National Museum of Australia sponsored by EzeScan.

Wednesday 14 October

8:30am: After Gala Grab N Go Breakfast.

9.30am - 4.00pm: RIMPA Live Convention sessions, keynotes, workshops and round tables.

9:30am - 5:00pm: RIMPA Live Trade Show Open.

5:00pm - 7:00pm: Vendor Games and Networking Drinks Sponsored by ELO Digital.

Thursday 15 October

7.30am: Vendor Breakfast Session.

9:00am - 12.30pm: RIMPA Live Convention sessions, keynotes, workshops and round tables.

9:00am - 12:30pm: RIMPA Live Trade Show.

12.45pm - 2.45pm: RIMPA Live Convention official close includes closing keynote, trade vendor prize draws, 2021 announcement, two course seated lunch sponsored by Castlepoint.

Be Inspired, Make Connections and Build Knowledge.

This year's RIMPA Live convention is not to be missed. Registrations are open now with early bird rates extended until 31 July 2020

Visit: rimpa.com.au

Recruit the best:

focus on leadership attributes

Management and leadership is a profession

Why do I say this? Because everything I've experienced in my career led to my understanding of the 'rights and wrongs' of leadership. I cut my teeth in human resources with Hewlett-Packard in the UK. At the time 'The HP Way' was globally respected as the gold standard for creating a great company culture. Working at HP set up the foundations of my strong belief in the critical importance of good leadership. And I stress good leadership – which requires its best practitioners to display specific attributes and attitudes.

DAVID PICH MA (CANTAB) CMGR FIML

That there are professional managers and leaders is hard to believe – especially if you observe the way we hire. Often organisations haven't defined what it is they need from a manager or leader. Now, I'm not talking about technical expertise or skills. When we hire, the first thing we try to figure out are the tasks of this individual manager or leader: do we need them to sell; to analyse data? Look at any job ad for a manager or leader and all you'll see is a list of technical skills. Yet we don't stop and think enough about the leadership attributes that we need this person to display.

"The well-known adage is true: people leave bad managers, not jobs or companies."

I'm not saying that technical and specialised skills don't matter. For example, an IT manager or a marketing manager must have a reasonably good – even expert – grasp of their professional field. But technical expertise is not good leadership. Typically, the skills needed to manage people are diametrically different from what you need as a technical expert.

DON'T HIRE ACCIDENTS

This reminds me of what we at the Institute like to call 'accidental managers' – people who've become managers based on technical knowledge. A classic example that comes to my mind is a sales manager I worked for in the UK. He was an exceptional technical specialist (with sales as his specialised subject) and yet an absolutely dreadful manager. The thing was, it wasn't really his issue at all. He did his absolute best with the skills and attributes he had. And these skills had served him very well as an individual contributing salesperson. But as a leader, they didn't serve him well – or the team he led – at all. That's partly why I left the team.

And I'm not alone. Throughout the past decade, IML ANZ's National Salary Survey consistently lists 'conflicts between staff and management' as one of the top five reasons people resigned. The well-known adage is true: people leave bad managers, not jobs or companies. In fact, in each of the last ten years, more than 25% of people left jobs because of their manager. That's a huge impact.

While having a sound grasp of the discipline you are managing can be useful, relying solely on technical expertise – whether it's accounting, sales, marketing, HR or anything else – is to leave leadership to chance. And when things are left to chance accidents happen.

So, before you bring any manager onboard based on technical skills (you deem as a must-have), why not focus on their leadership attributes first?

Here are some questions to ask about each candidate that reveal their attitude towards becoming a better manager or leader:

IS MENTORING A PART OF THEIR CAREER?

People who see themselves on the pathway of becoming a professional manager and leader will take all the steps they need to succeed. And getting an experienced mentor is one of those steps.

My mentor warned me that becoming CEO is a lonely job. She was spot on. As a leader, you often feel isolated as you sit alone towards the pointy end of the organisational pyramid. That's why finding a mentor is essential. Having a sounding board, someone to answer questions, listen and give advice from a position of experience is something all leaders need.

Before you hire anyone for management or leadership role, find out if they have a mentor. Or (even better) do they mentor someone? The best leaders allow their staff to make good decisions. They need to be ready to provide proper guidance. The very best leaders know that this is the central purpose of their role.

"Good, progressive and inquisitive organisations recognise that the process of moving from technical expertise into management is old and outdated."

HOW DO THEY ENSURE THEY ARE SELF-AWARE?

Our perception of ourselves isn't always accurate. Good leaders find ways to continually make themselves aware of their strengths and areas for improvement.

I remember when I had to face sobering feedback myself. I've always believed that one of my strengths as a leader is that I'm very strategic (I wrote a book chapter on it, and I present on the topic many times!). When my staff had to give me feedback, my biggest downfall was that they didn't think I explained the strategy well enough. That made me realise that I had a blind spot and that I needed to get better at explaining strategy.

Of course, self-awareness is a lot more nuanced than just one round of 360-degree feedback. But it's a person's attitude towards self-awareness that counts. So, find out how a potential new manager handles feedback and how they seek it out. Because self-awareness sits at the very heart of good management and leadership.

DO THEY PLACE IMPORTANCE ON REFLECTION?

Great leaders are not afraid of thinking (or talking) about what went wrong. In every management and leadership situation lies an opportunity to do better than you did last time. A good manager and leader will set aside time to reflect on what you could have done differently.

No one knows your experiences better than you do. Only when you get into the habit of reflecting can real improvement happen. In fact, this forms a large part of the process of becoming a Chartered Manager, the highest status that can be achieved by a manager or leader globally.

UNDERSTAND THE LEADER'S ROLE

Good, progressive and inquisitive organisations recognise that the process of moving from technical expertise into management is old and outdated. There's nothing wrong with becoming a technical expert first and a manager later in your career – only if you have placed an emphasis and commitment in developing your leadership attributes.

If we want to avoid leadership failures (such as the ones we keep reading about in the news), we need to stop valuing the wrong things when hiring leaders. It's time to recognise that we absolutely must place importance on leadership skills and attributes – not technical skills and abilities. Because if we only hire better managers and leaders, we'll have better workplaces, make better business decisions and – ultimately – create a better society.

ABOUT THE AUTHOR

DAVID PICH is the Chief Executive of the Institute of Managers and Leaders Australia & New Zealand - one of Australia's most pre-eminent leadership Institutes. The author of two bestselling leadership books, David advocates for sound management and leadership practise. He lives in Brisbane with his wife and two young daughters. **Contact: david.pich@managersandleaders.com.au**

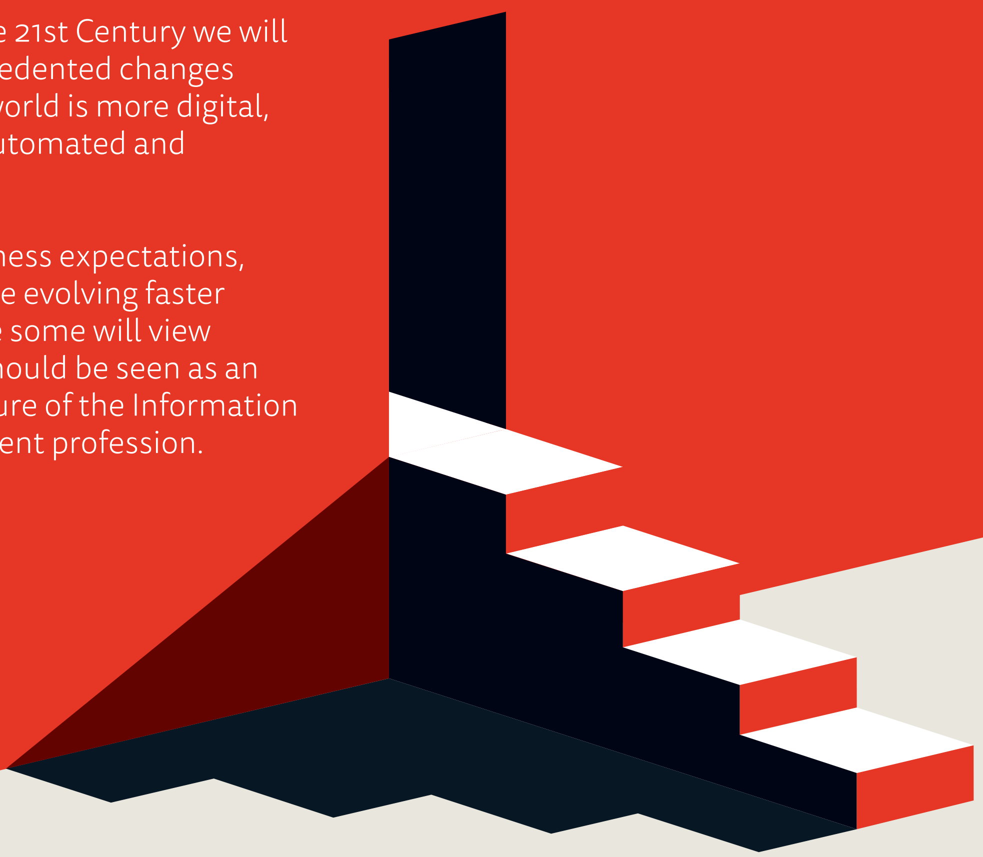
Management and Recruitment –

Choosing a Career in Information and Records Management

In the 3rd decade of the 21st Century we will continue to see unprecedented changes to the workforce. The world is more digital, more global, diverse, automated and technology-savvy.

At the same time, business expectations, needs, and demands are evolving faster than ever before. While some will view this as a challenge, it should be seen as an opportunity for the future of the Information and Records Management profession.

BY LINDA SHAVE



SPECIAL FEATURE: CAREER

In order to choose a career in Information and Records Management, one needs to understand how the records and information management profession has got to where it is, the events and influences that have shaped it, and envisage where the industry might be heading.

50 YEARS OF INFORMATION AND RECORDS MANAGEMENT IN AUSTRALIA

In 1969, the Records Management Association of Australia (RMAA) was formed, this marked the dawn of professional records managers and records management in Australia. It changed its name to the Records and Information Management Professionals Australasia (RIMPA) in 2010. RIMPA has faced many hurdles since it's inauguration and yet continues to navigate obstacles such as the accelerated speed of new and evolving technologies, Big Data and digital transformation challenges. RIMPA showcases strong leadership, encourages excellence in records and information management and advocates the values of the profession.

WHAT IS RECORDS AND INFORMATION MANAGEMENT?

Records and Information Management (RIM) is the method in which a government and their agencies creates, collects, identifies, captures, manages, preserves and disposes of its information assets in all formats including physical, digital, structured, unstructured and semi-structured. The primary objective of RIM is to ensure that the right information is secure and available anytime, anywhere to the right person, in the right format at the right time and that the continued security, privacy and value of these information assets is/are identified, monitored, perpetuated and available in order that this information can be identified, visualised and utilised to its fullest potential.

CHOOSING A CAREER IN RECORDS AND INFORMATION MANAGEMENT

The human need for textual based information is as old as the art and science of writing things down. The invention of the printing press made the production of multiple copies of documents possible. The copying of business letters, reports and correspondences were hand written. Such textual based information and hand-written documents needed to be catalogued, filed and stored for future reference so that the information they contained would not be lost. In our digital era, nothing has really changed. The records and information management profession will still play a vital role in the capture, management, preservation, disposal and maintenance of information assets in order that the content, worth and value is not lost into the future.

"The human need for textual based information is as old as the art and science of writing things down."

Yes, the way we capture, manage, preserve and dispose of records and information assets may be changing and the landscape may continue to change. Especially, given the exponential growth of data and the large amounts of complicated and unorganised data sets which have become too large, complex and have become known as Big Data.

Big Data

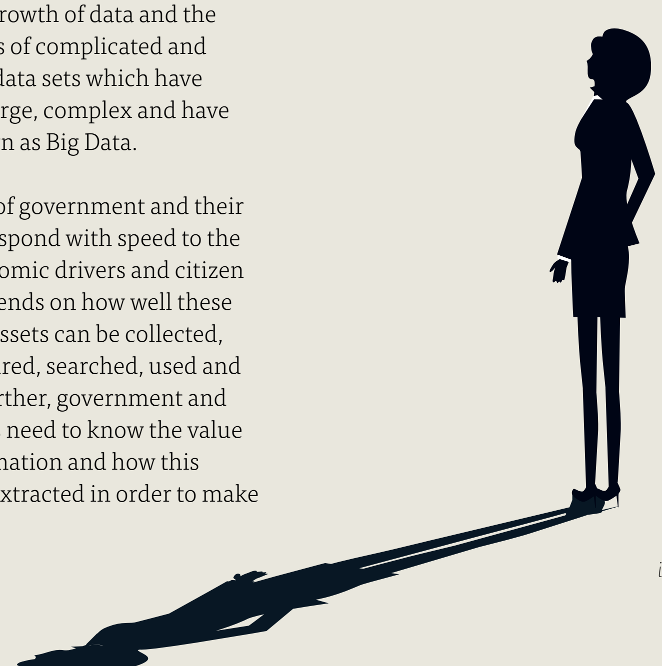
The ability of government and their agencies to respond with speed to the needs of economic drivers and citizen demands depends on how well these information assets can be collected, created, captured, searched, used and managed. Further, government and their agencies need to know the value of their information and how this value can be extracted in order to make informed decisions. The value and insights of information and data assets depend upon four categories, which are:

- Volume – The quantity of data being captured and stored.
- Variety – The complexity of data formats.
- Velocity – The speed at which data is entered into a system and must be processed.
- Veracity – The trustworthiness of data.

Risk Management, Governance, Privacy, Security, Cloud and Cybersecurity

Records and Information Management (RIM) risk management, governance and compliance are enablers to ensuring that the security framework of people, policies and technology are consistent and measurable across the entire enterprise. Whilst traditionally cybersecurity sits in the IT department and is defined as the protection of systems, networks and data in cyberspace. There is a need for RIM professionals to get involved in contributing to cyber security policy and threat assessments around records and information assets hosted on premise or in the Cloud.

Understanding, the concept of Cloud, cybersecurity and associated privacy implications might enable record and information professionals to become part of future digital project teams. This might become more apparent as traditional on premise EDRM/ECM models for recordkeeping and record management move to the Cloud and



"The digital transformation will continue to evolve pushing traditional boundaries of training and development by opening up new eLearning."

new tools such as artificial intelligence, robotic process automation, data decision making and active preservation are incorporated into daily activities for record and information management.

Further, the handling of privacy, security and the management of personally identifiable and workplace information has now expanded far beyond the domain of the IT department. Therefore, addressing evolving privacy and security challenges should involve record and information management professionals.

Skills for the Digital Economy

Record and Information Management professionals embarking on a career in Records and Information Management will need to acquire digital workforce skills. Digital transformation skills may require a fusion of technology, business, adaptability, critical thinking, problem solving, communication, entrepreneurialism, innovation, interpersonal and leadership skills.

Further, artificial intelligence, intelligent algorithms, machine learning, cognitive computing and data science are terms which will continue to be used in the information management arena. The product and services which will be generated from these drivers provide opportunities for information and records management professionals into the future.

Choosing a career in the new epoch of records and information management, I believe, is an exciting time. The meshing of disciplines such as traditional records and information management training programs with topics such as Cloud, Cyber Security and Data Science will provide a new and exciting opportunity for the profession.

FOR THOSE WHO HAVE ALREADY EMBARKED ON A CAREER IN INFORMATION AND RECORDS MANAGEMENT

Engaging with your Organisation and Career Progression

The digital transformation will continue to evolve pushing traditional boundaries of training and development by opening up new eLearning opportunities, using new tools and providing innovative approaches for lifelong learning for career progression. However, no longer can we depend on the employer alone to provide all of our training and development needs. This is particularly so in today's dynamic, global business world. There is a need to be proactive and take responsibility for our own individual development and to embrace lifelong learning.

The organisation in return, should engage with employees and embrace the concept that lifelong learning requires continuous education and training of employees, both formally and informally, on and off the job. It requires learning that is flexible, diverse and available anywhere and at any time. Lifelong learning must be student centric in order to provide the best possible development and opportunities for employees to meet the needs of today's and tomorrow's jobs. Today's learners need to acquire skills and knowledge through all forms of media, methods, channels and instruments as well as through the use of social media tools and technologies.

The reality of lifelong learning is no longer a catchphrase or motherhood statement but a reality for all of us who wish to remain employable in this rapidly changing landscape of the digital era. Learning on the job can only take us so far. Lifelong learning can be crucial when it comes to developing skills to take our career to the next level or to be able to change careers. Memberships of professional organisations such as RIMPA are essential for remaining abreast of changes to the industry, networking, attending workshops and seeking advice on professional qualifications and certification.

"Collaboration is the first step and key to our records and information management professional future."

Tips for a Career in Records and Information Management

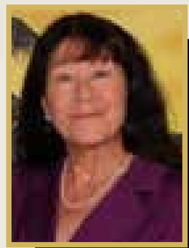
- Tip 1 – If already employed - Engage with your organisation and seek guidance on career progression for the digital transformation and/or digital workforce skills.
- Tip 2 – If not employed/thinking of a career in RIM – Speak to a career advisor or professional organisation (for example RIMPA).
- Tip 3 – Research online with job recruiters and review job descriptions (this will help you understand which employers are looking for employees in the RIM industry as well as providing you with a description of the role, skills and qualification needed)
- Tip 4 - Identify the academic qualification for your preferred entry level (For example to become a records and information manager, you may need to complete a bachelor's degree in records and information management, data science, business administration, library or a related field).
- Tip 5 – If not already a member, join a professional organisation such as RIMPA as a student and/or member. This will provide you with access to relevant information and contacts to discuss your future career path.
- Tip 6 – Remember the need for lifelong learning for your current needs and career progression.

CONCLUSION

Historically, careers within RIM have always been in a state of flux and roles have had to adapt and evolve to meet the changing landscape. In this the modern digital era, digital transformation will force changes within organisations due to the rapid onslaught of the fourth industrial revolution and digital transformation programs. Management, academia, digital leaders and professional bodies can be proactive and with forward thinking drive change. This transition, is already underway, and will require a skilled, educated and digital literate workforce with employees who are adaptive, agile, and focused on the future and the jobs for tomorrow.

Collaboration is the first step and key to our records and information management professional future. A future for the new and evolving records and information management professional is on the horizon. The outlook is bright!

"The reality of lifelong learning is no longer a catchphrase or motherhood statement but a reality for all of us who wish to remain employable in this rapidly changing landscape of the digital era."



ABOUT THE AUTHOR

LINDA SHAVE

MRIM is acknowledged as a thought leader and architect of change. She is a researcher, consultant and author on topic areas such as intelligent information management, artificial intelligence, robotic process automation, privacy and security. Linda is a gold laureate winner for Government Innovation and has an interest in data science, robotics and quantum computing. Linda is a member of numerous professional organisations.

Linda can be contacted at linda.bizwyse@gmail.com

A career so bright you've gotta wear shades

There are many paths to a career in records and information management. Some make this choice at the beginning of their careers as they choose their college curriculum. Others come on board from other occupations at different times in their career, bringing knowledge, experience, and contacts that can be a valuable asset to the industry. In all cases, if you are analytical, persuasive, empathetic, realistic, a problem solver and enjoy working with people, this industry is a great career choice.

BY CRAIG GRIMESTAD

Over the years, there has been expansion in the scope of different activities, particularly in the business community, largely attributable to the advent of the computer, computer systems, and the "information explosion".

Many companies are dealing with how to have an effective program in the current technological era. Historically, records and information management activities focused on being a service provider to assist with the preservation, management and storage of physical records. While still in scope today, industry responsibilities have expanded as companies also recognise a need for company-wide management and oversight of the access, use, storage, and disposal of records of all media types.

This expansion includes enterprise content management systems, enterprise information systems, email management, records retention schedules and data mining. This change in scope, along with oversight responsibility have caused companies to transition from traditional business functions to Information Governance (IG) business functions, which at the same time establish a wide range of job opportunities that can be very exciting.

Often companies have not fully developed their understanding that records are a corporate asset and have allowed their workforce to distance themselves from taking personal responsibility for managing storage and retention of the records they create and use. They have allowed the workforce to believe their time is too valuable to be spent managing records.

"A career in records and information management and IG offers the opportunity to make a valuable and visible contribution to a company."

These are common challenges for those working in records and information management and IG today. In addition to other talents and expertise, practitioners in IG should be adept in Change Management techniques and skilled in the art of persuasion. Companies and individuals need to be persuaded that records are a corporate asset and that it is in the company's interest, and the workers personal interest, for individuals to take responsibility and have a positive attitude toward records they create and manage, and embrace the new technologies they are asked to utilise as well.

A career in records and information management and IG offers the opportunity to make a valuable and visible contribution to a company. Companies universally have a need to manage their records and commonly have a significant need for improvement in their management of records and information.

Activities and projects commonly reduce cost, improve efficiency, or reduce risk (or perhaps all three) and therefore save the company money! Individuals working on these challenges, in addition to the self-satisfaction of doing a good job and making a significant contribution to the company, will have the opportunity for high visibility and recognition, and work with individuals at all levels across the company while establishing contacts across the business.

When properly implemented, IG provides a path for a company to take full advantage of the information they have accumulated, run the business with maximum efficiency, and help minimise the risk to a business. Practitioners in IG can look forward to this area of business increasing in stature and value as the company's information governance activities mature.

A word of caution. As you consider a job in this industry, include the organisational placement of the records and information management/IG program in your selection criteria – it matters. If you're not working within an IG business function directly, you may want to be sure that the function is within a corporate "power player" business function where you are more likely to have an opportunity to excel.

The business area should consider these criteria:

1. Understands that records are corporate assets that require maintenance.
2. Understands that records transition from having high value as an asset to becoming a liability when its life cycle is complete.
3. Has financial resources and can provide sufficient funding to maintain and mange records appropriately and implement initiatives.

A career in this industry offers great opportunities and a bright future. There are many diverse areas of business in which to make a significant contribution.

You may find yourself singing along to the song, The Future's So Bright.

ABOUT THE AUTHOR

CRAIG GRIMESTAD is a senior consultant with Iron Mountain Consulting. His specialty is designing RIM core components with a sub-specialty for RIM auditing. Craig holds a Masters of Science degree in Engineering and was the records manager for the Electro-Motive Division of General Motors where he participated in the development of the GM Corporate RIM program, and implemented and managed Electro-Motive Division's RIM program.

He blogs to: infogoto.com/author/cgrimestad

Skills needed for a career in information and records management

When I was asked to write an article on choosing a career in information management and the skills individuals might need, I reflected on my own career, the roles I've held and the skills I have developed in my 20 plus years' in the industry.

BY MEGAN CAPPELLERI (MRIM)

I thought back to the 19-year-old version of me, who landed a temporary job filing hard copy files while I was studying real estate, of all things. I was living in Victoria at the time and it was a really exciting era in the industry. The Kennett government had introduced mandatory outsourcing of services into local government and records management was often one of the services seen as a possible cost reduction or outsourcing opportunity.

As I was filing away in the compactus and sticking labels on file covers, I watched all of this unfold. It was a time of uncertainty for many who had held long-term roles in local government, yet also a time of excitement and anticipation for others such as myself who could see that a vast amount of change was about to occur. Being young and inexperienced at the time, this really excited me. What I didn't know was that this was the beginning of a career that I not only love, but now have the opportunity to share with others through consulting, leading and mentoring.

When I think about the skills that my younger self needed in those days to kick start my career, it was simple - a willingness to learn, the ability to think on my feet and customer service.

"I learnt very quickly that if any of the projects that we were working on were going to succeed that as Records Managers, we needed to have a baseline understanding of IT."

As I evolved from the filing compactus and into other roles such as records classification, archiving, registering of correspondence, it became apparent I had a lot more to learn. I needed to understand the core principles of records management, why we do things the way we do them and the benefits of sound information management practices within an organisation.

During this time, there was also rapid development in information management technologies with a number of organisations attempting to move into a new way of doing things. Email became a way of communicating and decision making - there was so much to grapple with.

This evolution kicked off my skills in project management and software implementation. Back then, the IT and Records departments worked in different worlds. In fact, it was like we came from different planets.

I learnt very quickly that if any of the projects that we were working on were going to succeed that as Records Managers, we needed to have a baseline understanding of IT. We also needed to get the IT teams to learn how to speak to us in a non-technical way. I would say that this is where my technical and negotiation skills kicked in.

A few years down the track and I progressed into my first Records Coordinator role for one of the Local government authorities that had been outsourced. As a young twenty-something-year-old this was daunting but this is where all of the skills I collected along the way really came into play.

I had studied information management and understood it, but I needed to add the skills of management, leadership, contract management and business writing to my tool kit.

I also needed a mentor and I was lucky enough to be championed by industry greats such as Anne Cornish and John Sim. I'm sure that my tireless questions and challenging of the status quo was both refreshing and trying at times. I distinctly remember John commenting that my inquisitiveness made him consider his own approach, which also happens to now be my favourite part about mentoring – that my mentees often make me reflect on my 'whys' and teach me new things too.

So, in telling part of my journey, I hope to have highlighted that choosing a career in records and information management requires more than just records and information management knowledge itself, we also need to consider other skills and traits, some of which include:

- Being a lifelong learner with the willingness to continually develop and evolve professionally.
- The ability to work autonomously or in a team.
- Keeping abreast of industry trends.
- Project management methodologies such as Agile and Prince2.
- Leadership and management capabilities including resource planning and budgeting.
- Technology-based skills in information management solutions, as well as an understanding of IT fundamentals.
- The ability to network and connect with like-minded peers.
- Communication – both verbal and the ability to write business documents such as tender requirements and business cases.

In writing this article, I undertook some research on the types of skills that are being sought when recruiting records and information management professionals today. It's no surprise that in addition to records and information management experience, there is a focus on skills such as data, technologies such as Office 365, information governance, analytics and experience with entire digital transformation projects. There is a genuine shift in the industry towards technology-based information management, which we all know has been around for a while now. It is imperative that if we are looking towards a long-term career in information management, we also add these skills to our portfolios.

SO HOW DO WE DO THIS?

- Have a look at courses and qualifications that you may be able to undertake (RIMPA has a number of short courses rolling out across the country).
- Take a look at the RIMPA Membership Status Upgrade process. The skills needed for an upgrade provide some insight into the skills required to progress throughout your career – for instance, data management.
- Seek out a mentor. RIMPA's formal mentoring program may be a good starting point in helping you to find a great mentor.
- For newbies to the industry with less than five years' experience, RIMPA has established a 'NOOBS' portfolio. Keep an eye out for NOOBS events and workshops.
- Engage your IT business. If you are not already working within your IT teams; make friends with them and if you can, get involved in an IT project.
- Get involved wherever you can - volunteer, network, attend events and join webinars.
- Seek roles that stretch your current skill sets and excite you.
- Engage consultants and vendors and individuals you can build an ongoing trusted relationship with who you can learn from.

Most importantly, as with the young version of me, stay inquisitive, challenge the status quo, ask questions and always consider the possible.

ABOUT THE AUTHOR

MEGAN CAPPELLERI is a practiced information management and digital transformation professional, with over two decades of experience across the government, private and utilities sectors. Megan is the Practice Manager, Enterprise Information Management at Datacom and engages with customers across Australia and New Zealand to help solve information management challenges. **Contact: Megan.Cappelleri@datacom.com.au**

SPECIAL FEATURE: CAREER

Flexible Working

Tim comments on research from Ingram Micro Cloud and Microsoft, which revealed that 60% of under 35s value the ability to work remotely over generous holiday allowances.

BY TIM WATERTON

Increasingly, organisations are adopting mobile, remote and flexible working to capitalise on numerous benefits, including higher staff productivity levels. But to achieve these benefits, the right tools and technologies must be in place. Under 35s can confidently use cloud-based collaborative, file hosting and sharing tools, and take a dim view of employers that are unable to provide this.

To satisfy this demand for remote working, organisations need to think smarter about implementing the right technologies.

In the pursuit of a better work–life balance, under 35s are actively seeking flexible and remote working practices, but whether they can find them from their employers is another matter.

Not only is it a case of whether an employer offers this, but it's also how. In theory, it should be simple, intuitive and seamless to access work remotely, but we know this not the case. In fact, a survey we ran ourselves across 250 IT decision-makers revealed that 90% found it at least somewhat challenging to search for and access documents when working remotely.

It is imperative that staff are able to have the same easy access to documents when they're out of the office as they do when at their desks. This will only grow further as digital natives continue to populate the office. Unfortunately, our research demonstrates that many organisations just aren't providing employees with the means to do this. Firms unable to provide the right infrastructure to support remote working risk losing employees to savvier competitors, who can deliver this in a straightforward manner.

To remedy these issues, organisations need to improve the infrastructure that is currently in place. Intelligent information management solutions, for example, can be leveraged to make the management of information much more efficient.

> **"To satisfy this demand for remote working, organisations need to think smarter about implementing the right technologies."**

Metadata-driven information management solutions allow organisations to simplify how staff access, secure, process and collaborate on documents.

Intelligent information management solutions can enable employees to access and manage business information anywhere using any device, regardless of where that information is stored, in an easier and faster manner. Remote working becomes easier, as employees can access information without needing to be connected to the VPN or company network, as well as accessing and changing documents while working offline.

Additionally, this approach can also improve security defences – an effective information management solution means employees working remotely are less likely to turn to consumer-level applications to share information. Because of this, IT departments can retain visibility and control over where business information is and how it is being used, which significantly reduces the risk of data breaches.

Millennials and centennials are often thought to be the driving force behind changing workplace practices, and are often seen to be having unreasonable and unrealistic expectations. This is simply not true. Work is becoming ever-increasingly something you 'do' rather than somewhere you 'go'. By enabling employees to access the information they need to do their jobs from anywhere, using any device – in a secure, controlled fashion – companies can ensure that they have the infrastructure in place to support the demands of digital natives.

ABOUT THE AUTHOR

TIM WATERTON is a senior consultant Tim is Director of Business at M-Files responsible for sales, marketing and delivery in the UK and Ireland. With a passion for business-driven technology solutions, he brings a practical perspective to the delivery of information management systems that transform business performance. Tim has 25 years of data management experience, working in a range of sales, marketing and product management roles.

Contact: www.m-files.com

This aritcle first ran in the IRMS Bulletin

2020 IS FOR VIRTUAL TRAINING!

MAKE SURE YOU MAINTAIN PROFESSIONAL DEVELOPMENT

In light of COVID-19, RIMPA have adapted training workshops to allow delivery to occur via videoconferencing. We are offering a variety of training workshops to allow the trainer and attendees to interact.

WORKSHOPS ON OFFER INCLUDE

- Records Management 101 – The Fundamentals.
- Data Management & Literacy 101 – The Fundamentals.
- Information Management Governance.
- Planning and Developing a Records Management Strategy.
- Identifying and Utilising Effective Classification Schemes.
- Developing and Implementing Classification Schemes.
- Planning for Digitisation.
- Digital Archiving.
- Archiving 101 - The Fundamentals.
- Implementing and Upgrading an eDRMS.
- Developing Records Management Online Training Tools.
- Change Management for Records Management Projects.
- Project Management for Records Management Projects.
- Developing eDRMS Business Requirements.

ATTENDEES WILL

- ✓ Gain an understanding of the main aspects associated with each topic.
- ✓ Receive real life experiences from our expert trainers.
- ✓ Understand the benefits of information management regimes.
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Evidential Evolution

Why did the records management (RM) function survive and evolve into the information management function we have today? Why hasn't the IT department which for so long looked to absorb RM yet it hasn't? On reflection, RM continues to bring benefit to an organisation, benefit somewhat grudgingly recognised by executives, adding value as a counter balance to the disposability the IT world suffers so badly. Additionally, at the strategic level, RM acknowledges the numerous strands of organisation life, rather than trying to build empires around them. Those strands woven together as Digital Husbandry[1] providing usable data for other organisation purposes.

BY KEN TOMBS

Broadly that preservation of structured (as in can we find later) information fulfils three key roles for the organisation. It supports decision taking at operational and strategic levels. It brings insight through What If? or What About? analysis. Finally, it evidences what was decided and carried out by way of protecting against some future financial claim or policy failure and provides the material basis of continuous improvement. On the dark side it evidences attitudes and behaviours that may have literally brought down a business[2], keeping admissible evidence is a double-edged sword, it can cut both ways!

From here let's focus on protection and evidence as that tends to get missed in leadership thinking- until it's too late!

Legal admissibility in court room terms for adversarial judicial systems, is pretty much about convincing a judge and jury that your information is credible and trustworthy. In the more presidential legal systems commonly practiced across Europe and Africa, ticking the decree boxes can outweigh any arguments of usability. Was the computer the right shape? Were the lights flashing correctly? Was the document scanned using the correct paper? Was the right stamp duty paid? All somewhat flippant observations but it can feel like that sometimes.

With the adversarial system, it's easier to argue either for or against your computer-generated evidence. It's happened where reasonable documented data was declared 'inadmissible' due to the finer points of a legal argument specific to just one case. Judges tend to take all evidence at face value, they are not keen on discussions about hard disks, white space compression, and operating systems - there is a tendency to glaze over which doesn't help the cause. For a judge or tribunal to simply accept what is put in front of them, what does having evidential value demand?

To an extent, it's a mish-mash of different functions all rolled together into what should be a single and consistent 'record' of business 'going on as usual'. Business as usual is important here as activities done for a special purpose are more likely to be challenged in pre-hearing sessions than any other type of record. Judges are generally smart enough to look for gaps in the evidence, meaning anything unusual will stand out like a sore thumb to them.

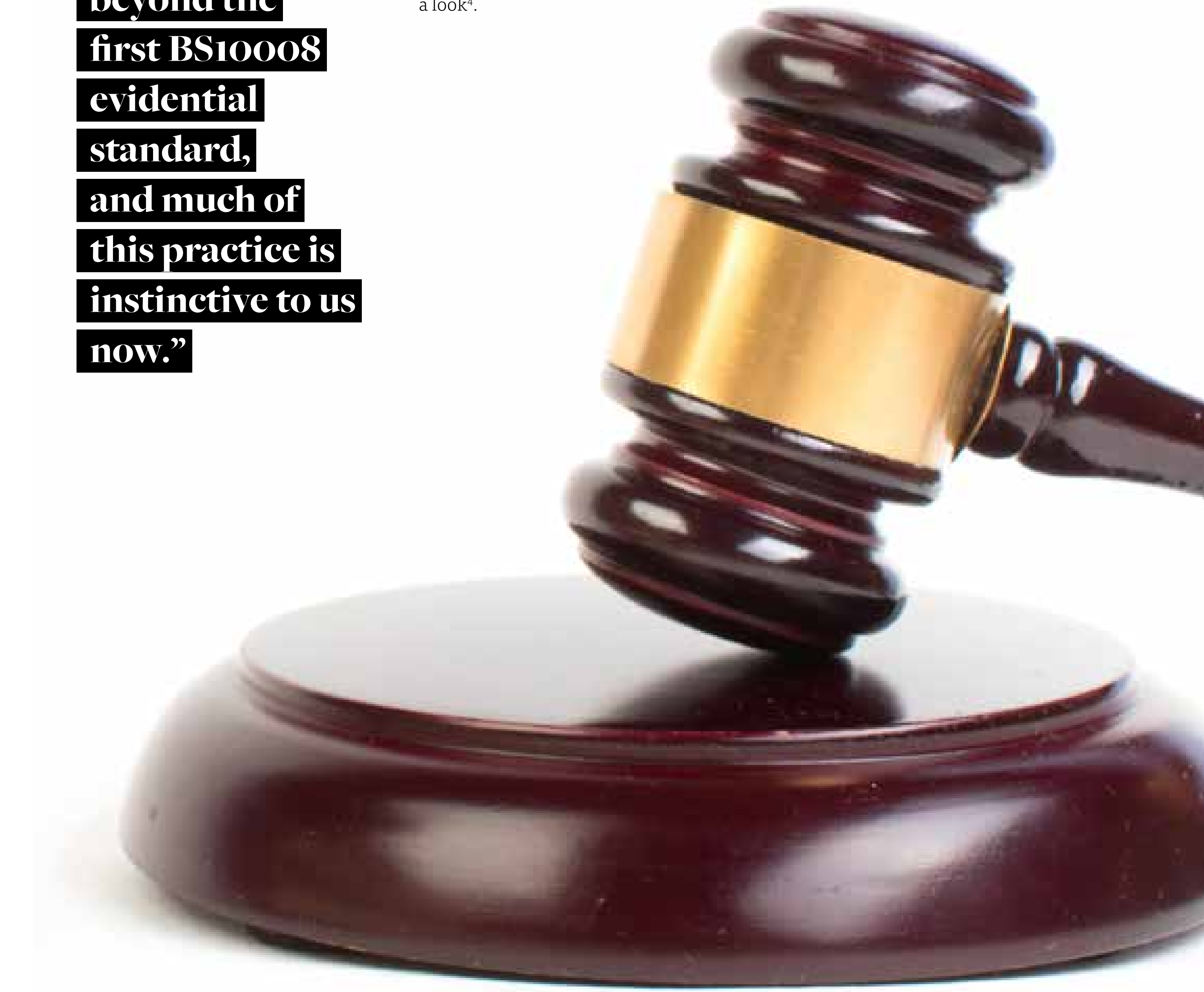
Preparing for our hypothetical court room debut, broadly we have to assure provenance, as in who and where any document came from. We have to assure it's identified properly as in indexed and taxonomies and such. We have to assure its untampered with as we receive it and afterwards. We have to assure it cannot be 'selectively' lost and assure a continuous chain of 'ownership'.

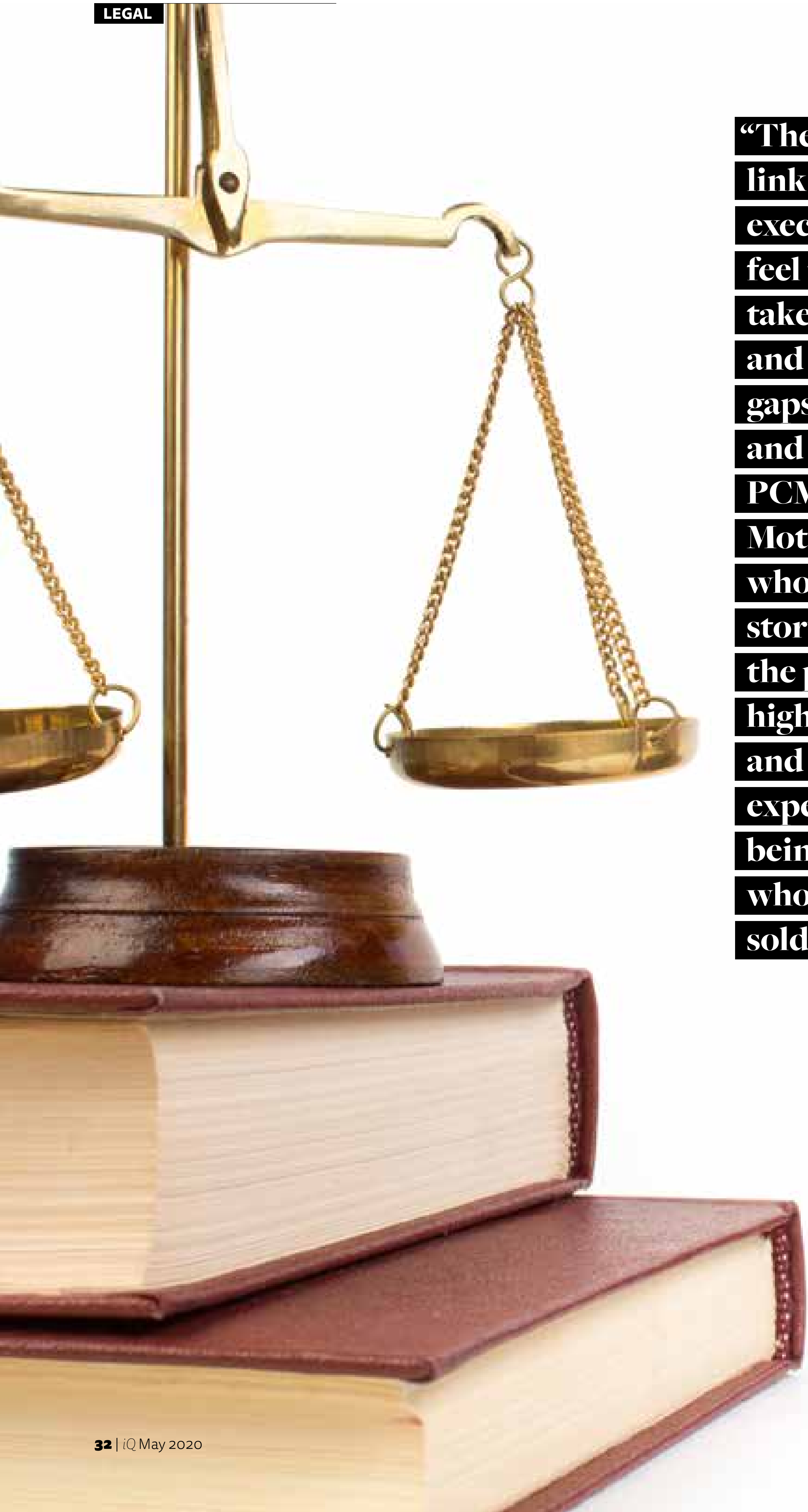
Yet, we have to assure we only keep data as long as retention schedules dictate. Then expunging what is no longer required. Legally redaction is such an ugly term if you keep too much for too long! Finally, we have to retrieve and package information for a specific legal setting, which is a whole industry unto itself.

"With such an all-encompassing mandate for records what guides the professional in this respect. Today we are some 30 years beyond the first BS10008 evidential standard, and much of this practice is instinctive to us now."

With such an all-encompassing mandate for records what guides the professional in this respect. Today we are some 30 years beyond the first BS10008 evidential standard[3], and much of this practice is instinctive to us now. We may not realise this as suppliers and developers tend to anticipate such key features and processes in their products and services. The standard helps document and prove that we do have good and transparent practices, and the data hasn't been tampered with in some way. While the original standard was focussed much on scanning paper, it has broadened in impact since and become quietly important in its sphere of impact. The standard has been refreshed so go take a look[4].

Let's now ask the question, where is the value and what are the consequences of having evidentially valid data up your sleeve? Well first, your executive sleeps better at night which is always good for the career path and second, it's becoming, I argue, the foundation of Digital Trust. Digital Trust being the promises from a tangible relationship between executives, employees, and the pubic and customers. Fake news is everywhere and it clearly undermines trust for everyone. Most is random and a distraction, the rest is positively malicious, and so when an organisation is challenged its undeniable protection is its recorded information.





"There is a clear link between executives who feel they can take the risk and exploit the gaps in legislation and reality. PCMag and Motherboard who broke the story, reflected the public has higher moral and legal expectations than being the suckers whose data gets sold on."

The media aggressively challenges anyone in authority and the public believes little of what is on the ether at any time. The growth of 'armchairism' has become such a problem now that the majority of serious media time is filled with one expert talking to another or journalists doing the same. A good colleague, Michael Bland wrote in his 2004 book, "When it hits the fan[5]!" about how as an expert in reputation management he was called by a TV studio to be interviewed on the news.

"I was once called by a journalist from a leading news agency who asked if I could come to the studio right away and comment on the Heineken crisis in Burundi."

"I don't know anything about the Heineken crisis", I [Michael] said, "and even less about Burundi".

"That doesn't matter' she replied, 'come and talk about it anyway!"

Trust or now termed Digital Trust[6], has emerged over the last few years as trust generally has diminished in the population, combined with executives being less certain that their businesses are truly fit for purpose. Can they trust their organisation not to fail them when times are hard! Has there been a hidden connection between 'proper Records Management' and emerging Digital Trust concepts? Possibly, this is because executives tend to think in straight lines, and at the end of it all they will have to publish those emails, contracts, tax returns or whatever - so it had better be the correct copy.

This becomes the ultimate tool in reputation management and demonstrating to the world that all is as it should be and above board. For me information management is the best reputation and legal protection any organisation can have, all part of the Digital Trust tryst between executive, staff and their public. One recent example of bare-faced misrepresentation only reinforces that loss or trust, which by implication undermines reputation from the consumers point of view.

Earlier this year Avast Software who provide Anti-Virus protection to 400million uses around the world, has closed its data marketing subsidiary Jumpshot[7] after two separate investigations found it sold 100 million users details to the likes of Microsoft, Intuit and Google. Jumpshot's executive had claimed the data could not identify individuals, however, 3rd parties checking comms traffic showed clearly it could be, including browser tracking and timestamps. Jumpshot gathered data from Avast users by making it less than obvious in the T&Cs and software they could opt out.

Avast's CEO openly acknowledged that though all was carried out legally though it raised "fundamental questions of trust". I think it raises a more fundamental conflict of interests in that the profitability of Jumpshot links directly to exploiting the user base of the other, who is emotionally and contractually promising to look after the needs of its AV users. Not good from a consumer trust point of view.

There is a clear link between executives who feel they can take the risk and exploit the gaps in legislation and reality. PCMag and Motherboard who broke the story, reflected the public has higher moral and legal expectations than being the suckers whose data gets sold on.

Professionally, evidential value is so closely linked with reputation and transparency, it's timely to think about how using BS10008 could positively impact on the culture of our organisations. How can RM assure that trust is not just about the evidential, it's about the reputational? Here doing something relatively small that might bring a disproportionate result in just how trusted our organisations are.

ABOUT THE AUTHOR

KEN TOMBS is a director of Fusion Experience, a compliance, privacy and cyber protection provider in London. He began his career in engineering before Honeywell, PwC and others. He's acted for UK, EU and US governments, founded (with Mike Steemson amongst others) electronic document admissibility guidance, and initiated the UK's digital preservation program. He lives in Normandy, France.

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1. My expression for the nurture and culling of information as need and policy guides us, to have a stronger herd of data along the way.
2. Enron https://www.sec.gov/litigation/litreleases/2015/lr23422.htm
3. The source Legal Images Initiative kicked off around 1992.
4. https://irms.org.uk/news/478317/Update-of-BS-10008-Legal-Admissibility.htm
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6. as everything is digital these days.
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PROFESSIONAL DEVELOPMENT

Self-Learning in the Digital Age

BY CHRIS FOLEY

Self-learning occurs when the individual decides for themselves what they will learn, how they will learn and when they will learn. Further, the individual performs the act of learning largely independent of others. We can see the dynamics of self-learning in the workings of two common tools: the hammer and the mobile phone.

The Hammer

Around 30,000 years ago, human beings first developed the hand-held hammer design we're familiar with today: a tool with a separate weighted head and handle for striking wood, bone, or stone to break them apart and shape them.

The durability of the hammer through the millennia reflects its simplicity – advances in technology have refined the tool, however, the basic utility of the hammer remains undiminished. Further, it does not require complex operating instructions or the completion of formal courses. Through imitation, children comprehend quickly the purpose of the tool. Repeated practice refines one's skill.

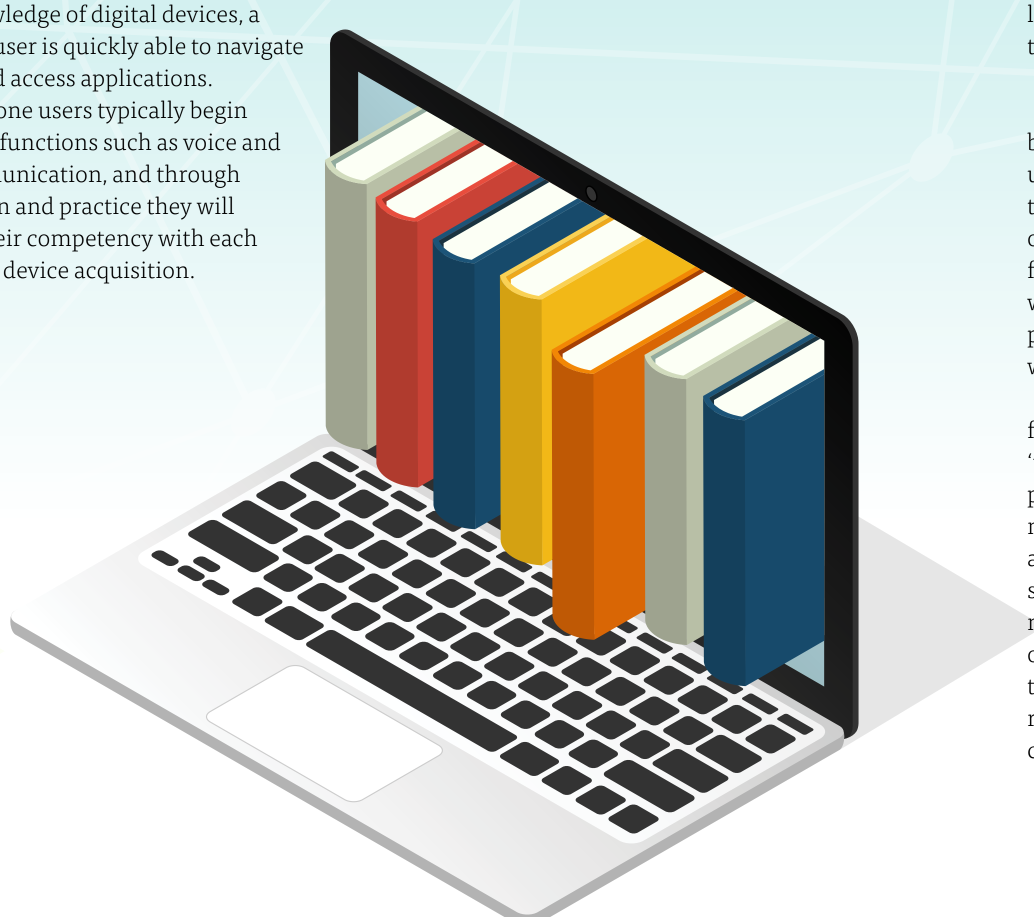
THE MOBILE PHONE

The mobile phone was created relatively recently, with the earliest commercial mobile phone network established in Japan in 1979. From humble beginnings as a portable telephone to make and receive calls, mobile phones have become the ubiquitous workplace tool and must-have fashion-accessory in the 21st century. It is a pocket-sized computer capable of a wide variety of functions, including the operation of digital applications and web surfing, as well as a device for voice and text-based communication.

The phone's universal appeal is based on several factors, including the intuitive nature of the design. With a basic knowledge of digital devices, a first-time user is quickly able to navigate menus and access applications. Mobile phone users typically begin with basic functions such as voice and text communication, and through exploration and practice they will expand their competency with each successive device acquisition.

SELF-LEARNING IN THE EARLY DIGITAL AGE

The mobile phone experience contrasts starkly with much of the learning experience associated with the Digital Age. The early technology was not portable or customisable, and it required the individual to depend upon the knowledge of others. Early personal computers relied on typed user commands into a DOS operating system. Later graphical interfaces greatly facilitated adoption, but without access to training and knowledgeable assistance, individuals often felt lost and confused by the myriad of desktop applications and their features.



The static nature of desktop computers and their attached peripheral devices significantly constrained individual user independence – individuals had to learn and operate computers from fixed locations during fixed hours (at work or at home), use narrowly designed input devices (usually keyboards based on manual typewriter designs) and with limited facilities for customisation of the user experience.

Tips for Learning in the Digital Age

The act of learning is intrinsic with being human. It can occur in simple and unconscious ways, such as observing the changing seasons in our gardens or in the varying intensity of sunlight from month to month. It can also occur when we apply ourselves to deep and purposeful learning, such as happens if we embark on university study.

In our professional lives, the need for ongoing learning is essential. New 'things' are always coming down the pipeline towards us – new technologies, new work processes, new work cultures and so on. Some are intuitive to use such as the hammer. Others like the mobile phone can be figured out using one's existing knowledge of digital things. Many new things, however, require dedicated focus to attain competency.

Some tips:

1. Awareness. Take an active interest in what's 'new' around you, or in what is happening in the industry. Being aware is the first step to taking control.
2. Reflection. Reflect on why you need to learn a 'new' thing. Learning something because you have a personal reason for learning is a powerful and successful way to learn. Learning something 'because the boss demands' it is not always a positive motivator for learning, but it is something to be aware about.
3. Timing. Knowing when you need to be competent or knowledgeable about a 'new' thing will help with prioritising your research and strategising. Balance the value of your time with the time and effort required to research, strategise and execute the learning.
4. Adaptation. Is the new thing like something you know already? Starting with the known is often an easier route to understanding.
5. Research. Find out what it is you need to learn. From the safety of one's computer or smart phone, explore the unknowable and make sense of the 'new' thing and how to go about learning it.
6. Strategy. Devise the approach that works best for you. Perhaps for the price of a coffee, you can ask a friend to educate you about the thing you wish to learn. In other cases, you may need undertake some more rigorous investigation or enrol in a formal course.

LEARNING OPTIONS IN THE DIGITAL AGE

While intuitive design is not (yet) a universal feature of digital devices and applications, the self-learner does have a range of learning options available to them. Some are informal, and some are formal.

- Face-to-face learning. Digital technology has not yet replaced the full experience of a face-to-face classroom. The social experience of interacting with an instructor and with fellow learners remains a powerful method of learning. The difference is that in the Digital Age, we can research course options and evaluate them quickly and easily.
- Virtual Learning. Online or eLearning has come along way. In the past they were often simply masses of presenters' notes without the benefit of the face-to-face interaction with the instructor. Modern options include:
  - Scenario-based learning. Modules might be arranged as real-life scenarios for you to read or watch, with a facility for you to respond by completing quizzes or discovering onscreen tips in context.
  - Enhanced reality. With the use of a device, such as a pair of smartglasses, your experience of reality is overlaid with additional sensory information. You feel immersed in the learning experience. Pop-up information prompts, for example, can assist you to operate a device in the real world.
  - Virtual reality. Again, with the use of a device, your perception of reality is replaced with a 3-D virtual world. By immersion in a virtual world, reality can be simulated in a safe manner and activities repeated or approached in different ways as often as you wish.

SOME TAKEAWAYS...

- Take control of your learning – don't let the deluge of new 'things' overwhelm you.
- Make the technology work for you, rather than you working for the technology.
- Simple is best. It worked for the hammer. It can work in your approach to your own self-learning.

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ABOUT THE AUTHOR

CHRIS FOLEY is an ECM Consultant – meaning, he is part records manager, part business analyst, part project manager, part solution architect, part trainer and much else besides. Many of his projects centre on workplace automation – involving process mapping, requirements gathering, problem definition, and system configuration. In a varied career, Chris has worked as a teacher, records manager, archivist, project specialist and consultant. After many years working for other people, he now manages his own consulting firm (Foley Business Consulting) which specialises in ECM consulting, workflow automation design, and training delivery. **Contact: chris.foley@foleybusinessconsulting.com**

Strawberry pop tarts and Rock and Roll

When a massive storm was bearing down on the southern part of the United States a few years back, a giant retailer was watching the weather patterns very closely. Their concern was not how their stores would withstand the beating from the high winds or if there would be store closures related to the weather. Nor were they worried about hosting a conference they were planning for store managers in Florida in the middle of the storm. Rather, they had their eyes fixed on one thing and one thing only. Strawberry Pop Tarts.

BY GUY C. HOLMES

You see, in the United States, whenever there is a major storm forecast for an area, the sale of Pop Tarts jumps significantly. Not just any Pop Tarts, but strawberry ones. I guess it is because you don't need electricity for toasting them to still enjoy one for breakfast, they are portable, and are wrapped in a plastic pouch to keep them dry. Diverting strawberry Pop Tarts to stores in the storm's path is a sure way to increase sales. And why not – people do need to eat, even in a storm.

Perhaps most interesting is that data sitting on a server from many years ago (the archive of their historical transactions) was and still is the gold mine that contains the data that good predictive analytics are based on. The farther back in time you can go to get a data source, the better it will often be at helping you predict the future. They took what others may have archived away on a tape into an offsite vault and turned it into knowledge that they could make money from.

Recently, I was part of a project for a customer in the Music and Entertainment industry in the United States. The project was centred around preservation archival "content/data" of video, audio, and images. The archive was made up of one of a kind interviews, concerts, and photographs covering the history of famous musicians and their contribution to music.

It had been stored away on physical magnetic tapes in a complex format that was not easy to restore. It had also been collected for so long that it came in at almost half a petabyte in size. A petabyte is a lot of data, and most companies don't have that kind of disk space laying around to hold their historical archive but as the public cloud has become more competitive, massive volumes like this can now be unleashed.

"The archive was made up of one of a kind interviews, concerts, and photographs covering the history of famous musicians and their contribution to music."

This was done for many reasons:

- To help make the inaccessible, accessible
- To get that content on a platform available to clients to improve the customer experience
- And almost more importantly, to see if there was a way to license or monetise the content to parties who may have interest in the material. i.e. make money form a cost centre.

So why would you want to unleash all this content? Most old data is not really worth keeping is it?

In the case of the major retailer, they made the most of a spike in Pop Tart consumption by having stock located in the right places so it could be sold. They knew that from using historical data and watching the weather patterns. They did what is called "monetizing content" – that is turning data or historical archives into revenue or revenue making decisions.

Many archive and records management teams within a company often suffer from lack of budget and are considered more of a cost centre to the business than anything else. A kind of necessary evil. But what most record managers' do not realise is that they sit on a treasure trove of value that could be monetized to benefit the company in ways they may have never envisaged. Imagine if your records management team was a revenue generator – that sounds pretty rewarding and exciting?

Here are some examples where this has occurred:

Training, Health, and Safety Records

Using Natural Language Processing and Artificial Intelligence to review health and safety claims has shown which jobs are most risky, what pieces of equipment are most likely to cause injury, and how much training a person needs on average to avoid injury on that equipment.

Equipment Maintenance Records

Use AI to analyse equipment maintenance records to determine how much was spent on maintaining equipment, what equipment has cost the most over time, what parts fail most often on equipment, and compare maintenance agreements with failure rates on equipment to cover your equipment for cost effectively.

Anonymised Video Surveillance and Sales

Many companies archive off their footage from their security camera systems and never look at it again unless there is an incident that requires a review. But running Artificial Intelligence on that footage can help with streamlining store traffic and helping to better understand checkout ques and improve customer experience and wait times.

As the cloud consumes archive data sets all over the world, true Big Data technology can now be deployed. Insights from the previously unseen, knowledge from the intersection of data sets that never occupied the same space, and the analysis of what was once not considered valuable will start driving key decisions in companies that just never looked into the detail of what they hold.

It's time to start looking at our archives and records for what they really are. The wealth of a company's knowledge over time. The cortex of the businesses brain – enabling not only decisions, but better or the best decisions.

ABOUT THE AUTHOR

GUY HOLMES has chased his passions wherever they took him over the past 19 years. In some cases, his passion led him to starting a company that imported wine accessories, and in another he founded a leading global data management company. Truth be told, after starting five companies, from scratch, in various industry segments, it should be no secret why Guy is bald. In most of Guy's business ventures, magnetic tape storage was a key component to the business he was creating, and he spent a lot of time professing the merits of tape storage as the long-term storage medium of choice. However, late one night in 2015, after 19 years, and having read over 5 million tapes, this all changed for Guy when he made a profound discovery. That discovery led Guy to found Tape Ark – a company driven to eliminate historical tape archives from the planet. Guy has a degree in Physics, an MBA in Technology Management and maintains memberships with the ASEG, PESA & the AICD.

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The role of change management in aged care

It is obvious that aged care is undergoing a serious transformational change which will last for a significant period of time. There are significant intergenerational changes occurring before our eyes. Governments of all persuasions are grappling with budgetary constraints, whether real or imagined. Add in the rapidly changing expectations of clients, relatives, and carers, and the increasing takeover and merger activity currently occurring in the aged care sector looks likely to continue for some time yet.

BY KEVIN DWYER

Significant organisational change has a powerful impact on people. Change creates a tension between the past and the future, between stability and the unknown. Regardless of how well-planned, strategic, or logical the change is, the tension still exists, because different individuals will react to and process the change in different ways. Asking people to change their behaviour on behalf of organisational goals creates an automatic emotional reaction.

How people cope with change depends largely on how leaders frame, communicate, and lead the change.

However, we must remember that we also have responsibilities to ourselves in a program of change. We should not forget that leaders are certainly not immune from the reactions to change that our people experience.

MANAGING CHANGE SUCCESSFULLY IN AGED CARE

To be a successful in negotiating our way through change, we must first understand the dynamics of change and the ways uncertainty affects us and others. The old way has to be mourned; the new way has to be understood.

It is most important for the change leader to see him- or herself as the role model toward whom all team members look for cues and clues about how they should respond to the changing situation.

However, it is equally important that we get people to personally refocus on what they can do to cope with change. Personally refocusing asks all of us to examine our individual feelings, motives, and assumptions about change. It is the place to start understanding how to cope with change.

The right leadership, culture, and reward systems all strongly determine whether an organisation is change-ready. But individual change-readiness, the willingness and ability of every person to accept, embrace, and support change, provides the cornerstone for change readiness across the organisation.

What do change-ready individuals look like? And how can you as a leader ensure you and your team are change-ready? Consider the following.

CHARACTERISTICS OF CHANGE-READY INDIVIDUALS

Psychologists Robert Kriegel and David Brandt (1997) maintain that change-ready people don't have to be superstars, but they do need to cultivate the following personal characteristics:

- Passion: feeling excited and challenged by new possibilities; relishing new experiences; having intensity and determination.
- Resourcefulness: making the most of any situation and using resources at hand to create plans.
- Optimism: having a positive view of the future.
- Adventurousness: wanting to take risks and to pursue the unknown.
- Adaptability: being able to shift expectations in the face of new realities and rebound from adversity quickly.
- Confidence: believing in one's own ability to handle a difficult situation.
- Tolerance for ambiguity: being able to live with uncertainty and surprises.

So, you've read the list of traits that characterise change-ready individuals. Do any or all of these traits describe you? If you're going to lead your team to become change-ready, you'll need to assess and possibly enhance your own readiness.

Most leaders have mastered the operational side of leading change; creating a vision, reorganising, restructuring and so on. They are educated, evaluated, and rewarded to deal with these issues so have more experience with them.

The stresses and pressures generated by operational change make it more important to pay attention to what's going on with the people in the organisation. As we've discussed, leading through transition is about guiding people through a process of grieving, letting go, building hope, and new beginnings. When leaders ignore or minimise the people side of change, perfectly good initiatives stall or fail.

Twelve Key Capabilities

For many leaders, managing the business and addressing the needs of workers are at odds. They ask, 'How can I make the tough decisions if I have to focus on the emotions and concerns of my employees?' The answer isn't about choosing either the people or the business. Instead, the answer lies in being authentic and building trust.

Bunker and Wakefield (2005) developed a set of twelve capabilities critical to leadership during times of change. Imagine a wheel that has trust as its hub. Radiating out from that hub are the spokes, which represent twelve capabilities critical for change leaders. These twelve capabilities are listed below; the first six are operational in nature, while the last six are people-related.

Creating and sustaining an environment of trust requires leaders to become adept at balancing all twelve capabilities.

1. Catalysing change is championing an initiative or significant change, consistently promoting the cause and encouraging others to get on board.
2. Sense of urgency involves taking action when necessary to keep things rolling. A leader who has a strong sense of urgency moves fast on issues and accelerates the pace of change for everyone.
3. Being tough denotes the ability to make the difficult decisions about issues and people with little hesitation or second-guessing.
4. Optimism is the ability to see the positive potential of any challenge and to convey that optimism to others.
5. Self-reliance involves a willingness to take a lead role or even to do something yourself when necessary. A leader who is self-reliant has a great deal of confidence and is willing to step up and tackle most new challenges.
6. Capitalising on strengths entails knowing your strengths and attributes and confidently applying them to tackle new situations and circumstances.
7. Coping with transition is about recognising and addressing the personal and emotional elements of change. It includes being in touch with your own emotions and reactions.
8. Realistic patience requires knowing when and how to slow the pace down to allow time and space for people to cope and adapt.
9. Being empathetic involves taking others' perspective into account when making decisions and taking action.
10. Realism and openness involve a willingness to be candid and clear about a situation and prospects for the future. It includes speaking the truth and admitting personal mistakes and foibles.
11. Trusting others means being comfortable with allowing others to do their part of a task or project. It includes being open to others for input and support.
12. Going against the grain involves a willingness to learn and try new things – to get out of your comfort zone – even when the process is difficult or painful.

Finding the right behaviours, tone, and style can feel like an impossible balancing act at times. But, because trust is so crucial to a leader's effectiveness, it is a challenge that cannot be ignored.

Understanding how change-ready we and our people are and where our strengths and weaknesses lie in leading change are important precursors to managing change.

At Change Factory, it's our business to drive changes in behaviour and adoption of new processes. To find out more about the tools and techniques we use to make change happen within six weeks of launching a major change initiative, get in touch with us.

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This article first appeared at www.changefactory.com.au

ABOUT THE AUTHOR

KEVIN DWYER has been the Managing Director of Change Factory for 19 years. His career before that comprised 25 years in Shell in may different roles. The one constant was initiating and managing change. His first interaction with a record and information project was with what was Energy Australia which has since become Ausgrid. The project team he was part of won the J Eddis Linton Award for most Outstanding Group. The project, over three years, changed usage rates of the recordkeeping software and processes of 4500 people from less than 4% to over 80%. Kevin believes that managing records is a productivity improver and should be seen as such, not as a compliance issue. That belief has lead to many more successful change management projects in the records management industry. **Contact: kevin.dwyer@changefactory.com.au**

Taxono-what is it?

Improve your search and tagging (no animal stuffing required)

This article is an in-depth write-up of the talk I presented at the IRMS Conference at Celtic Manor in May 2019. It was intended for an audience who might not be expert practitioners in this area, but either had an interest as information professionals, or who had been told by their boss to 'do a taxonomy' for something.

BY HELEN LIPPELL

I've been a taxonomist for a long time, and have worked both as a permanent in-house person, and, more recently, as an independent consultant. I've worked in many different sectors, from government to video games, and it can still surprise me that that the problems different kinds of organisations face are similar, no matter how well-resourced or innovative they are.

I still get people asking me if I stuff animals for a living (taxidermy). I'm usually very polite with them, but I do insist that they then listen to me explain what a taxonomist really does.

The ideas discussed here are applicable whether you are working with enterprise systems, such as intranets or document management systems, with public-facing websites, with search engines, or with content publishing. I don't delve into particular technologies in the piece, as they all have quirks, and I mostly want to encourage people to think strategically about how their information is categorised, managed and used.

After dealing with some taxonomy design issues via the medium of a real-world analogy, I will give a few pointers for getting started on a taxonomy project. To start, here are a few basic definitions:

TAGGING

Tagging is the process of adding extra information to content, data or information. This is done in order to make that material useful, findable, queryable (by humans or machines), manageable, and compliant with policies or legal regulations.

Metadata

Metadata is what this extra information is called. There are lots of definitions for this, which have come from fields including library science and records management, but I like to make a key distinction between 'is-ness' and 'about-ness'. 'Is-ness' metadata tells you things like file type, author, created date, and other bits of information that are intrinsic to the individual piece of content. 'About-ness', which will be the main focus of this article, is to do with the content itself, and might encompass definitions, genres, topics, people, places, things and so on.

ENTERPRISE SEARCH

Enterprise search is the term used for in-house search applications that are usually managed by in-house staff. These search tools might be on document management systems, digital workspaces and so on. I include this definition to differentiate enterprise search from search engine optimisation (SEO), which is performed to try and get your website or app content to the top of search results on Google (other search engines are available!). I personally have less interest in SEO than in enterprise search, where you can really dig deep into what your users need and work directly with them and with content authors to try and improve relevancy.

TAXONOMY

A taxonomy is a controlled list of words and phrases that are arranged in a hierarchical 'tree' structure. Taxonomies are usually defined within a domain (eg, clothes, HR, teams in your organisation, books) and for a stated purpose. If you've ever been to a zoo, shopped online, or used a library, then you have been a consumer of taxonomies designed to help you navigate or find what you need.

So why do we bother doing this work? When I'm working with a client who needs help in getting up to speed about taxonomies, I try to explain the business benefits, of course, but I will use analogies to try to bring things to life a bit more. I have had good success using the supermarket as an analogy for a large space that caters for lots of different kinds of 'content' (products) and people (shoppers with different needs).

It helps generate good-quality discussions. It helps surface considerations for the digital world, such as user needs, tagging and search experience, that might not have otherwise been thought about when they should have been. What's more, if you can hone in on someone's top bugbear about finding a particular product in their local supermarket, then you might be able to get them thinking more empathetically about the poor users who can't find what they need on your intranet, records management system or website.

Building a taxonomy from scratch requires the taxonomist and their colleagues to think about the level of complexity of the vocabulary, the likely users, the purpose of the taxonomy and the contexts where it will be surfaced (eg, a drop-down menu on a form). If we were going through the same process in designing the layout of a supermarket, would we group the products by colour or alphabet?

A supermarket organised by colour would look very pretty on Instagram, but I suspect it would be hard to shop in! Likewise, if the products were arranged by alphabet, shoppers would need to think about, say, whether red onions would be with 'R' products or 'O' for 'onions, red'. These whimsical examples hopefully illustrate that good taxonomies are designed with regard for the reality of their use, not just because someone fancied building it that way.

A supermarket organised by colour would look very pretty on Instagram, but I suspect it would be hard to shop in!

In many stores, big and small, groceries such as bread and milk are located at the back of the shop. This is because the store owners want to encourage shoppers to look at other

"A supermarket organised by colour would look very pretty on Instagram, but I suspect it would be hard to shop in!"

product aisles, instead of just picking up what they most regularly buy and leave quickly. This demonstrates a tension that can happen in business taxonomies, where the business wants to promote certain products or services over the things that users might want easy access to. Taxonomists often have to find a balance between competing stakeholders, for example, negotiating with a team who want to label a process document on the intranet completely differently from what users put as keywords when searching for the same thing.

TAXONOMY

Digital content or information has the advantage over physical things in that it can be surfaced in multiple places at no extra cost. Yet, the supermarket domain is still helpful in highlighting the choices that can be made to help improve the findability of things. I like to drink nut milk, and in my local supermarket you can find it with other lactose-free products, also in the chilled dairy section, the healthy snacks section, and with other vegan products during the annual 'Veganuary' promotion. Nut milk is perhaps harder to categorise than say, carrots, which are only ever found +with other vegetables, but also the supermarket designer is giving me multiple opportunities to buy something in an increasingly trendy and lucrative product category.

A big consideration in taxonomy design is labelling, and so it is also in supermarkets. To use a recent, personal experience, I wanted to buy pineapple chunks and had expected they would be with other canned fruit. However, they were actually with custard and other desserts. I hadn't thought of them as a dessert food because I'm one of those people who likes to put pineapple on the pizzas I make at home. This trivial example (if you think pineapple on pizza is a trivial matter, that is!) illustrates wider questions of labelling choice when it comes to business taxonomies. Questions of corporate versus user language, bias against marginalised groups or people, and appropriateness of certain labels, come up in every taxonomy project I do.

1. The first thing to do when building a new taxonomy (or reviewing an existing one, for that matter) is to set a clear purpose. Too many projects still start with a sponsor saying 'we need a taxonomy' before they have defined what it needs to do. I find myself asking 'why' a lot when I am consulting on a project. I've seen some taxonomy implementations that looked as incongruous as a horse in a living room, simply because the taxonomy was allowed to develop into something it wasn't.

"Digital content has the advantage over physical things in that it can be surfaced in multiple places at no extra cost."

This includes out of date vocabularies, over-complex structures, taxonomies that weren't being used for what they were originally intended for, and taxonomies that had duplication and mistakes as a result of poor ongoing governance.

2. Agreeing where a taxonomy will be used is critical. Here are three common uses of a taxonomy, and the ways in which the design and labels could differ:

3. A navigation taxonomy for browsing should have a structure which is not too burdensome to click through, and should use labels which make sense to as many users as possible.

A taxonomy for use within an enterprise search, might have more levels and a much wider vocabulary, including synonyms, in order to help the search technology match user searches to the most relevant results. A search taxonomy that will be surfaced as facets and filters (as you might see on most online shopping sites) might have lots of facets to cover the range of information that users might want to filter on.

Taxonomies for tagging content that will be aggregated or repurposed in some way need to be easily usable by anyone manually applying tags, and with labels that are unambiguous enough for automated classification technologies to work well. (For example, a food website taxonomy that does not differentiate between turkey, the food, and Turkey, a country where some recipes come from, will produce some nonsensical tagging. Turkey recipes from Turkey probably need human tagger intervention!).

> "Finally, it is critical to have an ongoing governance process for handling change requests for the taxonomy, and making sure it stays relevant and fit for purpose."

3. A taxonomist should always investigate what exists already before embarking on a brand new project. This could entail looking for freely available public resources, such as industry standards or linked open data (such as Geonames for geographical place names and data). For some sectors, such as fintech (financial technology), it is possible to buy in data curated by third parties, such as lists of companies, that firms might not want to create themselves from scratch. Finally, there is usually value in rummaging around inside the organisation itself for taxonomies and lists that people are using whether officially or informally.

4. Taxonomy design and implementation are huge topics that could fill a book, but the thing to keep in mind is that people building taxonomies should ensure they are deeply embedded in the project team, so they have a chance of influencing technology decisions, taxonomy software decisions, and making sure that the value of what they are developing is as widely understood as possible. There's no use crafting a beautiful vocabulary that no one else understands.

5. Change management is an important part of implementing a new taxonomy. This may include practical training on new systems and new tagging structures. But even more vital is dealing with any cultural change aspects from launching some new. Advocacy for the new system is needed, as well as persuading, and actively listening to, anyone questioning why they have to take time tagging (or have to tag more than they did before). If they are reluctant and a bit grumpy about it, there might be reasons that are nothing to do with the taxonomy itself.

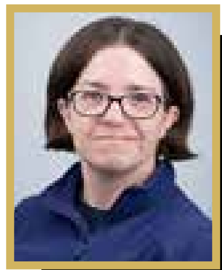
6. Finally, it is critical to have an ongoing governance process for handling change requests for the taxonomy, and making sure it stays relevant and fit for purpose. Governance should include measurement of success of the taxonomy or the individual tags within it.

So, in summary, I've tried to show how using analogies can be a powerful way of tackling discussions with stakeholders about the need for, and value of, developing taxonomies for findability and effective management of digital resources.

I presented a few key steps to help people get up and running with a taxonomy project. The main principles I work to as a taxonomist are pretty aligned to those of many other types of information professional:

- Be user-focused.
- Align to business objectives too.
- Design something that is meant to last.
- And don't forget all-important governance.

This article first appeared in the IRMS Bulletin.



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HELEN LIPPELL is a taxonomy consultant, who has been helping clients for over a decade. Her clients have included the BBC, the UK government, Financial Times, Time Out, RIBA, Metropolitan Police, Pearson and Electronic Arts. She writes and speaks regularly and is the programme chair of Taxonomy Boot Camp London, the biggest annual taxonomy event in Europe.
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INTERVIEW WITH

Frank Flintoff

Frank Flintoff is a Senior Information Compliance Specialist. She has extensive experience in developing and implementing strategies, systems and practices which enable streamlined, people-centric ways of working with information while facilitating enterprise-wide compliance.

Tell us briefly about your career...

I never said, "When I grow up, I want to be in information Management"; I wanted to be something arty or a scientist. I even studied biology, biomedical science and molecular biology with the plan of becoming an entomologist or research scientist. I tried out a lot of things, then eventually did a Master's in Information Management. I've done everything from factory work, to transcribing post mortems, plus been an audio editor, graphic designer, a librarian, and archivist and information manager.

How did you come to be an information strategist?

Information Manager traditionally suggests working with the information, rather than the people who create the information. I see my role as a blend of information governance, future-proofing and strategy to find new ways to help people work with the information they need in a more effective, streamlined way – a way that benefits people now, and will benefit people in the future.

You focus on developing a high-quality information and recordkeeping culture within your organisation. How do you go about this?

It's more about the people, less about the information. It's people who create bots, people who choose what to save and where, people who design systems and processes - so we may as well do all those things with our clients, end users and colleagues in mind. Think about solutions that will help people in a particular way, rather than telling them how to achieve perfect records. Lots of education, building strong relationships, a service mindset, leading by example, and a ton of creative thinking.

Tell us about your time working on document management reform for the Perth Children's Hospital Project.

Creating an information management program from scratch for a brand new hospital that hadn't even been built yet – that was an absolute blast! Major government projects aren't for everyone but I've got a lot of energy and a short attention span, so I adored the frenetic nature of it. I learnt so many lessons about myself and the corporate world that still influences how I work today.

Where do you see the profession heading in the next decade?

I'm not even going to guess. I believe we should relish the fact that we don't know. This will enable us to have open minds, self-educate, learn new skills and discover new passions rather than stressing about what you need to learn and what you might need.

Remember why you fell in love with this profession in the first place and keep a sense of child like curiosity and wonder.

profile

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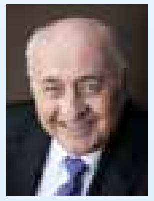

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