VOL 38 / ISSUE 4 / DEC 2022

THE RIMPA QUARTERLY MAGAZINE

Capturing records and information management news since 1984

iQ

SPECIAL FEATURE

INFORMATION GOVERNANCE
Data, Technology, Frameworks And Policies

RIMPA Global Meets ARMA International In Nashville, USA At #InfoCon2022

+ IN THIS ISSUE

ADVANCING AND CONNECTING THE RECORDS AND INFORMATION MANAGEMENT PROFESSION

iQ RIMPA GLOBAL
RIMPA QUARTERLY MAGAZINE

VOLUME 38 / ISSUE 4 / DECEMBER 2022

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www.rimpa.com.au

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VIEW FROM THE CHAIR

THOMAS KAUFHOLD LIFE MRIM
CHAIRPERSON, RIMPA GLOBAL

Welcome to the last edition of the IQ for 2022 and what a year it has been. Several milestones for RIMPA have been achieved over the year. This included the restructure of RIMPA which will see the end of the Branches and Chapters by the end of 2022 and replaced by a system of committees, working groups and the appointment of ambassadors to serve the interests of RIMPA members. A rebrand of RIMPA also occurred. These changes were voted on by the professional members with over 90% supporting the structural changes and the rebranding. A new RIMPA board was directly elected by the professional membership and the new board will commence in January 2023. Direct election by the professional membership now means that these members have more influence in the makeup of the Board.

By the time you read this the appointment of Ambassadors may have been completed or is well underway.

As members are already aware, a partnership has been formed with ARMA International to pursue common objectives and goals. ARMA International extended an invitation to the RIMPA Board to attend their InfoCon 2022 conference in October in Nashville Tennessee, USA. The RIMPA Board accepted the invitation by sending myself, Anne Cornish (CEO), Jo Kane (Marketing, Events and Collaboration Manager) and dedicated board member, Jeremy Manford, who joined the RIMPA party at his own cost. We were warmly welcomed by the ARMA Board and attended their Board Meeting and other strategic meetings.

A central focus was the formation of an international consortium with RIMPA Global and ARMA International as the foundation members. Several focus group meetings were held to consider the make up and purpose of the consortium. These focus groups consisted of:

- Joint ARMA and RIMPA Board Focus Group – positively providing long term objectives and purpose.
- Two ARMA Member Focus Groups – in favour of the consortium and looked at internal structural issues to accommodate the planned consortium.
- Vendor Focus Group – positive support and they see the consortium assisting vendors in selling the importance of information management.
- Australian Focus Group – Very Positive and provided excellent ideas for moving forward.

These focus groups were conducted by a professional facilitator, Lowell Aplebaum who will collate the outcomes of the focus group meetings and provide a report. This report will be used to assist in setting up the consortium.

The trip to Nashville proved to be very rewarding with good outcomes and deepened the relationship between ARMA and RIMPA. There is a strong commitment to set up the consortium and we should see a solid start and development of this exciting initiative over the next 12 months.

The special feature of this IQ edition "Information Governance" is very appropriate given the recent data breaches of Optus, Medibank, Energy Australia and elsewhere. I have no doubt these data breaches will continue to occur. Due to our advocacy role, RIMPA provided comment which was published in the Financial Review and was followed up by an interview with the ABC News Radio with Anne Cornish, CEO.

Over retention of data or information has been a focus here and it all comes down to not having good records management in place to ensure information is deleted/destroyed in a timely way.

The trip to Nashville proved to be very rewarding with good outcomes and deepening the relationship between ARMA and RIMPA. There is a strong commitment to set up the consortium and we should see a solid start and development of this exciting initiative over the next 12 months.

Throughout my work experience, it has been very difficult to get support from Senior Management to allocate resources to undertake a records disposal program, particularly for digital data or records. This is now costing these organisations hugely, both financially and reputationally. Will they finally get the message that good records management is good for the organisation and their working career? The adage that it is easier to keep records then destroy them in an accountable way is long past its use by date. Sometimes I feel that I am better off teaching kangaroos to walk backwards.

In a similar vein, I was once again disappointed to see the Australian National Audit (ANAO) Report on the Digital Transformation Authority (DTA) audit which found major issues with their procurement processes. Serious as this is, the ANAO was also frustrated with the DTA for not being able to provide records underlying their business function. Surely, we must expect more from an organisation whose strategy states 'The Digital Government Strategy (DGS) is our plan to deliver a digital government that meets and exceeds the expectations of Australians'.

On a lighter note, I would like to wish you all, family, and friends a good and happy holiday break and a successful and rewarding 2023.

- Thomas Kaufhold LIFE MRIM
Chairperson, RIMPA Global

WELCOME TO OUR NEW MEMBERS

Did you know... your RIMPA Membership allows you to advertise **FREE job listings**? Submit your listing here: **rimpa.com.au/marketplace/jobs-board/submit-job-vacancy**

The Membership space has had an extremely busy quarter with many new members jumping on board. We have welcomed nearly 220 new nominees, 26 organisations and 64 individuals which include students and practitioners.

VET TRAINING

Over 15 students have completed their Certificate III in Business (Records and Information Management) with continuing students completing both the Certificate III and IV. Read more about one of our students and her journey leading up to completing the course, in the Member Profile on page 51.

DIGITAL PRESERVATION COALITION (DPC) MEMBERSHIP

We celebrated World Digital Preservation Day on the 3rd of November which prompted our Professional Members to utilise their DPC membership. Feel free to contact the Admin Team, if you wish to know more about this exclusive member benefit: admin@rimpa.com.au

ARMA INTERNATIONAL MEMBERSHIP

We have reached over 100 joint memberships with ARMA International and RIMPA. This global partnership provides access to reciprocal resources including communities, professional development, and advocacy. It is through partnerships like this that we can work together to provide a unique perspective on global information issues.

To find out more about this opportunity and how your career can benefit from becoming an ARMA International Member head to **www.rimpa.com.au/join-now/member-benefits/arma-international**

NEW CORPORATE COMPANIES

ACT
- Canberra Institute of Technology

NSW
- Queanbeyan-Palerang Regional Council
- Tweed Shire Council
- Carrathool Shire Council
- Department of Education - NSW
- Transport for NSW

NZ
- Maritime NZ
- Museum of New Zealand Te Papa Tongarewa

Qld
- Queensland Treasury Corporation
- Noosa Council

SA
- Port Augusta City Council

Tas
- Burnie City Council

Vic
- Mornington Peninsula Shire Council
- City of Stonnington

WA
- Monarch360 Pty Ltd

NEW INDIVIDUALS

ACT
- Stephen Watt - Canberra Health Services
- Veronica Townley-Jones - Charles Sturt University

NSW
- Anita Franjieh
- Melissa Frewen - Gwydir Shire Council
- Emma Bryce - Murrumbidgee Council
- Stacey Perry - Bega Valley Shire Council
- Tao Zi (1st Year Student) - Charles Sturt University
- Claire Debenham (1st Year Student)
- Juliet Hart (1st Year Student) - Castlepoint Systems
- Kelley Whitty
- Damian Wicks - Catholic Diocese of Maitland-Newcastle

NT
- Sorcha Redmond (1st Year Student) – Castlepoint

NZ
- Elizabeth Griffiths

Qld
- Isabelle Robberechts - Gold Coast City Council
- Natalie Haynes (1st Year Student) - Rio Tinto
- Liz Tavender (1st Year Student) - Queensland Parliamentary Service
- Karyn Mott (1st Year Student) - Graphene Manufacturing Group
- Lenice Schultz (1st Year Student)

SA
- Matthew Johns
- Balakrishnan Ananda Krishnan (1st Year Student)

Vic
- Brandon Jackson
- Sharon Carlton
- Robin Wright
- Victoria Wilson (1st Year Student)
- Carol Bullen (1st Year Student) - RMIT
- Jessica Cox (1st Year Student)
- Jenny Edelmaier (Student) - RMIT University
- Jacinta Jubb - Ambulance Victoria

WA
- Jessica Brierley (1st Year Student) - Curtin University
- Naomi Macdonald (1st Year Student) - Hallmark Developments

ARMA INTERNATIONAL MEMBERS

- Jesse Wilkins - Anthro Consulting
- Ellie Kim - Alberta Health Services
- Lisa Rose - Albemarle Corporation

Canada
- Rick Stirling
- Kate McKinnon
- Nicholas Fonseca - City of Leduc

United States of America
- Sherry Barrera
- Charles Booz - Information Governance CA
- Tod Chernikoff - Navy Federal Credit Union
- Peggy Nannenga - AZ Dept of Gaming

RIMPA AND ARMA MEMBERSHIP BENEFITS

Arm yourself with double the benefits and enhance your career further when you add on an ARMA International membership to your existing RIMPA membership.

Drive your career and gain access to more information and resources outside of Australia and New Zealand.

Apart from the amazing list of benefits you receive from RIMPA, for a small additional fee, you will also receive:

- Weekly updates with timely & relevant resources
- Special discounts on training and certificate programs, events and programs
- Online and Chapter Community, industry groups, and mentorship programs
- Complimentary webinars from industry experts
- 24/7 access to a library of publications
- Job-seeker access to the career center

WHO IS ARMA INTERNATIONAL?

ARMA International is the community of records management, information management, and information governance professionals who harness the benefits and reduce the risks of information.

ARMA International supports members professional and career advancement with forward-thinking education, continued meaningful networking, and cutting-edge business tools - everything members need to successfully navigate the full information cycle.

ARM YOURSELF WITH
DOUBLE THE BENEFITS

iQ

NEXT EDITION: MARCH 2023

THE IM APPROACH TO PROJECT MANAGEMENT: MODERN INSIGHTS, STRATEGIES AND PITFALLS

- Popular Project Management Methodologies
- Tools to take you in to the new age of rapid change and complexity of information management
- Information Management Strategic Insights or Pitfalls to creative project management
- Mastering the Information Age using data analytics to enhance your project management

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COPY DUE: 10 JANUARY 2023
Submit your story to:
editor.iq@rimpa.com.au

Changes to the recordkeeping framework in NSW Government

BY STATE RECORDS NSW

Legislative changes to the recordkeeping framework for NSW Government have been recently passed by the Parliament of NSW.

The changes establish two new statutory bodies from 31 December 2022, the State Records Authority of NSW (State Records NSW) and Museums of History NSW (MHNSW). The two organisations will both administer the State Records Act.

Provisions of the State Records Act relating to recordkeeping regulation and compliance and the protection of State records will be administered by State Records NSW while provisions relating to the management of, and access to, the State Archives Collection will be the responsibility of Museums of History NSW.

The amendments to the State Records Act will strengthen the framework for good recordkeeping, which underpins government accountability. They will also ensure the care and protection of records of enduring value and enable a transparency of government thinking and decision making by enabling earlier public access to State records.

There are a number of reforms and changes to the provisions of the Act.

1. Change to the definition of a State record

The definition of a State record at section 3(1) has been amended. It is now:

State record means a record made or received by a person, whether before or after the commencement of this section –

a. in the course of exercising official functions in a public office, or

b. for the purpose of a public office, or

c. for the use of a public office.

The new definition clarifies what is meant by the term State record and removes “and kept” from the definition to make it clear that any record made or received for use by a public office is a State record for the purposes of the Act whether it was kept or not.

2. New monitoring power for State Records NSW

The State Records Act includes a new monitoring power for State Records NSW. This will commence from 31 December 2022.

The new sections 12(5) and 12(6) of the Act enable the Authority to issue a notice to a public office requiring the public office to conduct an assessment of its recordkeeping processes and records management program, and to report the findings to State Records NSW. If State Records NSW is not satisfied with the public office’s report or the findings of the report, then it may include information about this in its Annual Report.

This new power recognises the importance of good recordkeeping as a foundation of accountability and transparency of government and is designed to support better compliance across public offices. It will enhance the efficiency and effectiveness of existing regulatory tools.

3. Changes to the transfer of State archives provisions

Public offices will now be required to develop transfer plans for their records that are required as State archives. It is important to note that there is a 12-month transition period for this requirement which will come into effect from 1 January 2024.

Transfer plans will enable Museums of History NSW to better support public offices with their obligations relating to the State records they create and hold. The information received will be used to support the strategic and operational planning for the future care and protection of the State Archives Collection.

The amendments to the State Records Act will strengthen the framework for good recordkeeping, which underpins government accountability.

4. Reforms to the access provisions for State records

There has been a change to arrangements for public access to State records. Effectively, the open access period for State records has been reduced from 30 years to 20 years and records older than 20 years will be open to public access by default. There are no changes to the ability of a public office to apply an access direction to close sensitive records for a longer period of time if required.

There is also a 12-month transition period for these new access arrangements which come into effect from 1 January 2024.

The reduction of the open access period from 30 to 20 years for State records is in line with current trends across jurisdictions and community expectations that government should be transparent and accountable for the decisions it makes on behalf of its citizens.

What do all these changes mean for NSW Government organisations?

The changes do not impact the operations of the Government Records Repository (GRR) which continues to offer compliant services in records management as part of the commercial operations of the Museums of History NSW.

Both State Records NSW and Museums of History NSW will support and collaborate with public offices through the changes. The two organisations will both administer the State Records Act, and our focus will be to continue supporting and working with public offices to achieve improved recordkeeping.

National Archives Australia Update: Digitisation Hub

BY NATIONAL ARCHIVES OF AUSTRALIA

NAA
NATIONAL ARCHIVES OF AUSTRALIA

National Archives of Australia has just celebrated the first year of a highly productive partnership with Micro Image at its new Digitisation Hub in Canberra.

The Digitisation Hub forms part of National Archives' Defend the Past, Protect the Future program. On 1 July 2021 the Australian Government announced an extra $67.7 million over 4 years for National Archives to boost its critical functions. Under this program digital preservation of critical at-risk collection material is taking place, including at the Digitisation Hub.

Following a tender process, Micro Image began operations at the Digitisation Hub in January 2022 accelerating National Archives' ability to preserve fragile and significant paper records through digitisation. This partnership with a commercial provider operating on the National Archives' premises is a cost-effective and time-efficient way of digitising large volumes of collection items. The unique leasing arrangement also enables Micro Image to undertake its own sourced projects at the hub, for either government or private clients, further increasing industry capability in the region.

Working to National Archives' Preservation Digitisation Standards, the Digitisation Hub is equipped to digitise a full range of paper records from files to bound volumes and large format maps, plans and posters. As project requirements change, the hub can also change and scale-up to suit. This includes the potential to digitise photographic material.

Over the last year, the hub has digitised significant at-risk collections with an emphasis on records from National Archives' offices in South Australia and Tasmania. Many of these records are pre-Federation or early twentieth century. Highlights include petitions of patents, colonial-era building maps and plans, lighthouse logbooks and early meteorological records.

Many of these records have not been easily accessible by the public due to size, fragility or location. With the increased capability provided by the Digitisation Hub, National Archives is able to extend the reach of the national collection through digital access while preserving these records for future generations.

Nominations Now Open For The 2023 Sir Rupert Hamer Records Management Awards

Public Record Office Victoria

BY PUBLIC RECORDS OFFICE VICTORIA

We are pleased to announce the return of the Sir Rupert Hamer Records Management Awards.

The Sir Rupert Hamer Records Management Awards is an initiative of the Public Records Advisory Council (PRAC) which provides advice to PROV and the Minister for Government Services on the administration of the Public Records Act; and promotes cooperation between PROV and government agencies.

The Awards, established in 1998, recognise excellence and innovation in records management within the Victorian Public Sector.

After a four-year hiatus, PRAC President Judy Maddigan says the recommencement of the awards is a significant step in recognising the importance of innovation and excellence in an ever-changing records management environment.

"The last few years have provided great opportunities and challenges for recordkeepers and information professionals, many of whom have pivoted to managing the records of government remotely. We look forward to seeing this year's entries and awarding the excellent work achieved across government in the recordkeeping of our State's unfolding history."

Victorian government agencies are invited to submit nominations for outstanding records management projects completed or substantially completed between 1 July 2019 and 30 June 2022.

Visit prov.vic.gov.au for more information.

New Chief Archivist Appointed In New Zealand

Anahera Morehu (Ngāti Whātua, Ngāpuhi, Te Rarawa, Te Aupōuri, Ngāti Kahu) has stepped into the role of Chief Archivist from 17 October for a period of at least six months, following the resignation of Stephen Clarke.

Anahera, who will be based in Tāmaki Makarau (Auckland) has, since February, been Kaihautū (Director Ratonga Māori) at Te Rua Mahara o te Kawanatanga Archives NZ. This position will be backfilled so Anahera can fully assume the Chief Archivist responsibilities.

Prior to joining Archives NZ, Anahera was Kaiārahi at the University of Auckland, Waipapa Taumata Rau Faculty of Business and Economics and was the immediate past president of LIANZA (Library and Information Association of New Zealand Aotearoa).

Anahera has broad and deep experiences of Te Ao Māori, including fluency in Te Reo Māori and leadership in tikanga. She also has substantial knowledge of the documentary heritage and information management environments, the GLAMMI (Galleries, Libraries, Archives, Museums, Marae, Iwi) sector and awareness of Archives New Zealand and its Treaty of Waitangi aspirations.

"Mā tō rourou, mā taku rourou, ka ora ai tātou"

Te Tari Taiwhenua has heard from iwi that they would like to see the services that are delivered through Archives New Zealand become more responsive to their needs. Some excellent work has been already delivered, where a Te Ao Māori worldview has become more prominent in its work.

Anahera Morehu

To assist Anahera during this period, a new temporary GM position will ensure that Archives NZ is supported to deliver the busy work schedule ahead and that existing business processes are streamlined to assist the new Chief Archivist to settle well into the position.

RIMPA Global Meets ARMA International At #InfoCon2022 In Nashville

BY JOANNE KANE

Feeding our appetite of global proportions, magic happened while Thomas Kaufhold Chair of the Board, Anne Cornish CEO of RIMPA Global, Independent Director Jeremey Manford and Joanne Kane Marketing, Events and Collaboration Manager attended the ARMA International convention #InfoCon2022 in Nashville, Tennessee 16-19 October 2022.

Held in the super-sized setting of the Gaylord Opryland Resort we all certainly got our step count in around the 75-acre property, which has more than 2800 rooms. For perspective the biggest hotel in Australia, Hyatt Regency in Sydney has only 888 rooms.

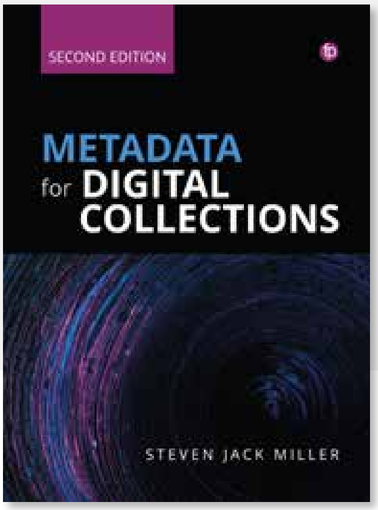
Apart from the opportunity to meet face to face with our global partners ARMA International, it was a chance to communicate, collaborate, and engage with our tribe across the globe.

With over 750 delegates, 40 plus trade exhibitors and a teeming program filled with rich content spanning a diverse range of subject matter plus many out of the box social networking gatherings both on and offsite, we were spoilt for choice on all counts throughout the convention.

The range of content delivered was fit for purpose with incredible similar practices, issues, concerns and triumphs affecting our cousins across the Pacific in the USA. From information governance, cybersecurity, big data, managing records at Microsoft, artificial intelligence, digital transformation strategy and our very own Anne Cornish CEO delivering a sensational and engaging session on increasing the profile of records and information management practitioners, there was plenty of opportunity to get down to business and immerse ourselves in educational sessions.

It didn't stop with just the convention as we joined the ARMA International Board meeting, engaging in healthy discussions surrounding the formation of a global consortium to champion both the information governance and record management communities. In a series of focus groups led by Lowell Aplebaum, we opened the conversation and discussed the possibilities, the threats, the challenges and most importantly the opportunities that the creation of a global consortium would bring to not only RIMPA and ARMA but all over the world.

Stay tuned for more information surrounding the global movement that will bring RIMPA Global members even more opportunities to communicate, connect and collaborate with our industry!



Metadata for Digital Collections:

2ND EDITION

Author Steven Miller

REVIEWED BY FRANK FLINTOFF

If you're skimming past this review thinking "seriously, how can there even be enough about 'data about data' to write a whole book?", I'm going to have to do a Kanye and say "I'm really happy for you, I'mma let you finish, but Miller has one of the best nerd-level books on metadata of all time. One of the best of all time!"

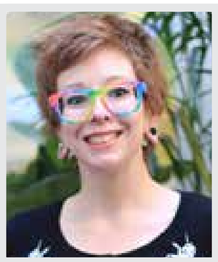
It's not often a technically focused tome (yes, tome is correct; this baby is chunky) manages to cater for all levels of learner, from beginner to experienced professional wanting a brush-up, but Metadata for Digital Collections (2nd Ed.) manages to do it. Often considered the authoritative text on metadata, Miller's given this baby a scrub-up, and it's now all shiny and up to date for a new generation of Information Management, Library and Data Governance professionals.

Ever the sceptic about a "second edition", I admit to half expecting the same content with a new cover, but I am pleased to say I was wrong.

Metadata for Digital Collections focuses on what is becoming an essential aspect of designing and working with corporate information in 2022, but that many of us didn't have a chance to learn at uni/during PD - machine readable metadata. When linked government data was an aspirational buzzword, information managers may have passed by Miller's work, dismissing it for the realm of libraries, or maybe research data in the university sector. However, there's no arguing that the ability to understand and create metadata standards, ontologies and schemas are much-valued skills in today's data-driven world, and it is here that Metadata for Digital Collections really shines.

There's an ocean of acronym to wade through here, particularly if doing a 'I just want to quickly find what I need' flip-though: DCMI, RDF, BIBFRAME, MODS, VRA, SKOS. Don't let them scare you! This text is not exactly the type of book you pick up to quickly brush up on some terminology, rather it's a chapter-by-chapter journey, but without the dirge-like structure of textbooks of old. I've been known to fall asleep in textbooks back in my uni days, so you can trust me on that. If, like me, you learn best by seeing concepts in practise (or, taking things apart...) rather than reading about them, Miller's section on Metadata Application Profile Design and appendices talks through metadata designs and mapping from real organisations, allowing us to see what is actually working for these agencies.

Some days in a profession, the difference between traditional standards and practices ('how it should be done') and the design allowing the best possible balance between compliance and a high-quality human user experience is a gaping crevasse rather than a little bump that a little creative thinking will get us past. It's on these days I'll be most grateful for Miller's thoughtfully and clearly described - and more importantly, usable - teachings in Metadata for Digital Collections. This is absolutely one you'll find yourself picking up again and again.



ABOUT THE REVIEWER

Frank Flintoff, previous recipient of the '2018/19 New Practitioner Award' remains a dedicated corporate punk, ready to start the IM riot, and die on many hills of unpopular opinion and hard truths about our kick-ass profession. Professional interests: Change management, data governance, figuring out the difficult problems no one else wants to, innovative solutions, process improvement, oxford commas, and other nerd stuff. Personal interests: Gigs, gaming, gardening, playing their circa 1930 piano, drawing and avoiding housework for as long as humanly possible.

Behind The Minds Of The Board Members Shaping The Future Of RIMPA Global

"Sometimes the most ordinary things can be made extraordinary, simply by doing them with the right people."
- Nicholas Sparks

Introducing the newly appointed Board Directors who bring insight, fresh perspectives and a wealth of experience and knowledge to the table to shape the future innovative direction of RIMPA Global.

It is the united front of the entire Board that will not just take RIMPA from strength to strength, but will lift and solidify RIMPA's position on a global scale, taking it from ordinary to extraordinary.

We sat down with the newly appointed and existing Board members from around the globe to find out who they are and what has shaped them throughout their careers.

THOMAS KAUFHOLD
LIFE MRIM

Chair of the Board
Elected Director 2020-2023

How long have you been involved with RIMPA?

Since 1975 when the ACT Branch was established.

Where do you see the future of the information management profession heading? What changes if any would you like to see?

Clearly information technology is still advancing rapidly, and that information is stored in an ever-increasing number of platforms which is challenging to keep up and deal with. Artificial intelligence or machine learning is now seen as a way of managing this information chaos. It may well be the case, but there is danger that while the application of artificial intelligence matures, vital records are lost, and harmful errors are made. The Information Manager has a critical role to play here in steering the application of this emerging technology forward whilst maintaining sound records management principles and standards.

Tell us two tips or tricks that you carry in your toolbelt of knowledge about the records and information management that you would not be able to do your job without?

1. Develop your negotiation and project management skills
2. Keep up to date with information technology trends, learn the language.

Do you have a favourite quote or book that has really resonated with you?

Records Management is easy, but it is people who make it complicated. (Ross Thompson, former ACT Branch Council member, Federal Councillor RMAA)

PETÀ SWEENEY
FRIM

Vice Chair
Elected Director 2022-2024
Strategic Pillar: Innovation and Standards

How long have you been involved with RIMPA?

Some days it was from the time when records were written in stone. Seriously I am coming up to 25 years.

If you were to sit-in on a debate between records management vs information/knowledge management what would your proposition be?

Why do I have to make a choice? Our world has never been more informed or connected. Data, information, records and knowledge are constantly being generated through every click, swipe, financial transaction and content stream. How often do I set aside time in my day to 'make a record' or 'create knowledge' but rather technology has made these by-products of daily life. What I think is more important to consider is as this volume of information increases, the value of IM skills to collect, curate and manage has never been more important or more necessary.

What has been a defining moment in your career that has shaped the drive you have within the records and information management industry?

I was on secondment to the Policy Unit at Queensland State Archives during the rollout of the Public Records (Queensland) Act in 2002/3. At that time, I had a real sense of 'making a difference' whether it be in assessing a Strategic Recordkeeping Plan, providing advice, training or reporting the state-wide progress of recordkeeping best practice. Sadly, I did not get the job, but I'll never forget that feeling and to this day I work to make a difference.

Do you have a favourite quote or book that has really resonated with you?

Oh, I love this question, I regularly have 4 or 5 quotes pinned to my whiteboard, my two faves now are ...

"At first glance it may appear too hard, look again, always look again." - Mary Anne Radmacher

"You are never too old to set another goal or to dream a new dream." - C. S. Lewis

BONITA KENNEDY
LIFE ARIM

Elected Director 2020-2023

Tell us a little bit about yourself

I have been working in records management in some capacity since the ninety's and more actively in the industry since the 00's. I have worked across all levels of government and the private sector and have been working as a consultant for 20 years.

In addition to that I have a small honey business, two kids, partner, cat and a dog!

What advice would you give to anyone considering a career in the records and information field?

Remember that compliance is important but without engagement and an understanding of the needs of the business and the people that work within it you will never be able to achieve it.

Records Management – good records management – helps people. It helps the business; it helps people do their jobs and it potentially helps researchers in the future. If you work from that premise, you will get a lot more engagement and therefore success.

Do you have a favourite quote or book that has really resonated with you?

"In with the peach, out with the green."

REBBELL BARNES
LIFE MRIM

Elected Director 2022-2024
Strategic Pillar: Advocacy & Collaboration

How long have you been involved with RIMPA?

I have been part of RIMPA for 18 years now and still love being part of the RIMPA family

Where do you see the future of the information management profession heading? What changes, if any, would you like to see?

I believe the future for the information, library and knowledge professional is exciting and vibrant with endless possibilities shaped by changing technology and the changing need of our users. The challenge is to continue to grow and develop, learn, adapt, and innovate.

The quality of information available and provided, the understanding that information is an asset, and the information superhighway will create, I believe, fundamental changes in the way information is managed and used

Tell us two tips or tricks that you carry in your toolbelt of knowledge about records and information management that you would not be able to do your job without?

1. Always pay attention to detail and deadlines. As custodians of the organisation's information, it is our task to ensure it is available, accurate and current for use.
2. Teamwork and committed staff who understand the importance of record keeping.

Do you have a favourite quote or book that has really resonated with you?

My favourite quote is "Champagne please" ......always like my Champagne.

I am partial to books about fine arts, particularly jewellery and small objects.

My Grandmother gave me Thomas Rohan's book - In search of the Antique - when I was quite young. Interestingly this renowned publication was first published in 1927 by Mills and Boon.

DAVID PRYDE
LIFE MRIM

Elected Director 2022-2024

Where do you see the future of the information management profession heading? What changes if any would you like to see?

Legislation and standards that call for more robust records management functionality to be included in digital transformation and SAAS eSolutions. Especially in the areas of classification, retention and disposal for a starter.

What advice would you give to anyone considering a career in the records and information field?

1) Support your career through some form of qualification in any of the information disciplines.
2) You don't have to do it alone – plug into the support network that is RIMPA and be mentored by the best RM/IM professionals in the world.
3) Learn everything you need to know to do your job well and then do it proactively.
4) Do everything to the best of your ability, and beyond.
5) Don't be afraid or proud to ask for help
6) Knowledge is not power – information sharing, and collaboration is the real power

Tell us 2 tips or tricks that you carry in your toolbelt of knowledge about records and information management that you would not be able to do your job without?

You will never know everything (get used to the idea) but knowing where to find the answer is the secret. Being able to say to someone – "I don't know the answer to that, but I know how to find out" will open doors, improve your credibility and worthwhile building your knowledge base.

Do you have a favourite quote or book that has really resonated with you?

"Never, never, never give up." – Winston Churchill

NANCY TAIA
MRIM

Elected Director 2022-2024

What does holding a position on the Board of RIMPA mean to you? Why take up such a role at this stage of your career?

I think I've always been moving towards this role, my involvement with RIMPA has enabled me to grow and support the Queensland membership over the past 19 years and now with the move to RIMPA Global, being part of the Board will allow me to extend this to a wider audience.

As an essential part of any business, information management not being a core consideration is astounding to me. The wide chasm that exists across the varying organisations within our industry is perplexing and I believe a key component to be addressed. Moving the barriers that exist within organisations through education, knowledge sharing, and mentoring will help to close the gap while raising the profile of the industry and RIMPA. I truly believe myself and my fellow Board members have the focus and drive to accomplish this.

What advice would you give to anyone considering a career in the records and information field?

Do it! I fell into this industry by chance, but it has become my lifelong passion. There's no other field you can participate in that will enable you to shape a business from its foundation – and that's what this industry is – the core of all business.

Where do you see the future of the information management profession heading?

I see us moving in the same trajectory the profession started on about seven years ago – moving away from compliance enforcers into business enablers. Working with business to achieve strategic objectives whilst performing R&IM by stealth. Embracing technology more, particularly across government, with increased use of AI, cloud services and collaboration tools. Taking a step back and looking with a helicopter view to see the whole picture to help our customers do their jobs better.

Do you have a favourite quote or book that has really resonated with you?

"Just keep swimming, just keep swimming"
– Dory (Finding Nemo, 2003)

JULIE APPS
LIFE FRIM

Appointed Director Oct 2021-Oct 2023

Tell us a little bit about yourself

I have enjoyed a career spanning 43 years in Records and Information Management.

What advice would you give to anyone considering a career in the records and information field?

Look back on the history of Information and Records Management to go forward into the future as the principles remain the same. To succeed, engage with the community as the people make it most exciting and drive the change. Learn the art of hearing when listening to people.

What has been a defining moment in your career that has shaped the drive you have within the records and information management industry?

Too many to name but two that always come to mind was working with Swinburne University on establishing their Records and Information component to their Business Management course and assisting a secondary college school in developing their Records and Information component to their Business Management.

Do you have a favourite quote or book that has really resonated with you?

A great leader can inspire action through proper guidance and mentorship and uses their knowledge to educate others along the way. A great leader also practises what they preach by also "going the way".

LISA READ WHITE

LIFE FRIM

Elected Director 2022-2024

Tell us a little bit about yourself?

My day job is running Information Proficiency where I get to work with lots of different organisations and a great team of practitioners. I've been in the industry for over 20 years and worked in lots of different roles for both private and government organisations.

My typical day involves working on specific deliverables as well as supporting our team to work through their tasks and deliverables. The variety keeps my interest, and the evolving nature of the industry means there is always something new to learn.

What does holding a position on the Board of RIMPA mean to you? Why take up such a role at this stage of your career?

I've employed a lot of people over the years, and many have been trainees who we have developed into qualified practitioners. I've always encouraged our team to continue their professional development and join professional industry organisations like RIMPA. It's important that the industry has a body that provides access to peers, learning, mentoring, and professional representation. Its only possible for RIMPA to offer all of this if we as professionals contribute.

What advice would you give to anyone considering a career in the records and information field?

Give it a go. The industry has lots of aspects and specialisations that provide for a range of interests and personalities. The importance of IM is increasingly better understood by organisations and individuals, which means IM roles are increasingly influential.

Where do you see the future of the information management profession heading?

We are currently living in one of the most disruptive moments for IM in terms of technology trying to lead and challenge the rules of IM. Information Managers have the opportunity to influence the direction and decisions that organisations make, and those that apply their influence successfully will stand out.

In the next few years, software wise, we will see more organisations move towards all-inclusive packages rather than specialist programs. We will continue to see the more mature organisations, who carry valuable data, to gravitate to dedicated software that can be configured to support the business. This will be complimented through increased system integrations, more automated process management, and smarts like data validation etc.

JEREMY MANFORD

Appointed Director Oct 2021-Oct 2023

Tell us a little bit about yourself?

I'm a father of 3 who moved to Melbourne from Perth to open our new records storage facility in 2009. I used to be a pearl diver when I was in my early 20s in Broome I started in the family business in 1995 and worked my way through the business fulfilling multiple roles and am now the CEO of our family business Compu-Stor.

What does holding a position on the Board of RIMPA mean to you? Why take up such a role at this stage of your career?

I'm passionate about this industry and holding a posi on the RIMPA Board to influence best practice and help the organisation forward. It is something I look forwar to being a part of. The industry is constantly evolving a having the opportunity to help mould RIMPA for the fut is an exciting opportunity. I feel my business and indust knowledge can add value to the organisation and memb

What advice would you give to anyone consider a career in the records and information field?

Develop your solution skills and engage your colleagu – you don't have to know everything yourself - tap into their knowledge and creativity to assist in finding the solution. There will be many challenges ahead that will seem like roadblocks, but if you focus on the solution ra than the problem, you'll always find an innovative way around, over or even sometimes through that roadblock

Do you have a favourite quote or book that has really resonated with you?

Not from a book but from my time on the boats, an old skipper once told to me.

"Focus on the task in front of you - ensure to work wit everyone around you to complete the task at hand, it doesn't need to be solved by only you. Teamwork is key!

It's a simple quote but has resonated with me for deca

PETER WILLIAMS
ARIM

Appointed Director Oct 2021-Oct 2023 |
Strategic Pillar: Governance & Risk

How long have you been involved with RIMPA?

I've been involved with RIMPA now through my role at Loddon Shire for between 4-5 years.

What advice would you give to anyone considering a career in the records and information field?

Come into the industry prepared to learn and with an open mind. There are many mentors in the industry that will help guide and support your knowledge and skill set so make use of them. Oh – and make sure you become a RIMPA member.

What has been a defining moment in your career that has shaped the drive you have within the records and information management industry?

I have 35 years working across many industries, some in Administration and Customer Service, some in Information Technology. The common element has always been the fact that we produce and need to maintain information.

When I joined Loddon nearly 4 years ago, coming from an Information Technology space, my mind was blown with the Information Management concepts of our Business Classification Scheme, disposal schedules, permanent records, Digitisation Plans and so on. It's been a great learning curve for me. That really got me motivated to learn more about this space and actively invest in the learning and growth that is coming from it.

Where do you see the future of the information management profession heading? What changes if any would you like to see

I see more complexities coming for our industry as the growth in digital platforms where shadow information stores are being created can mean important information could be lost, with no Information Management context applied.

Do you have a favourite quote or book that has really resonated with you?

Vince Lombardi "Individual commitment to a group effort-that is what makes a teamwork, a company work, a society work, a civilization work

Four Critical Business Dimensions That Enhance Reputation

BY ROS WEADMAN

How much is your reputation worth? People are generally reluctant to put a dollar figure on their reputation because it's worth is invaluable when it comes to building a successful career and or sustainable business. As Virgin founder Richard Branson says, 'Your brand is only as good as your reputation'. While reputation may be intangible, reputation is currency because it influences your most important tangible results in business.

According to the Harvard Business Review, organisations with a strong positive reputation attract better staff, are perceived as providing more value so can charge higher prices and have more loyal customers.

After more than 35 years of building brands and managing reputations, I believe that building a great reputation comes from being consistent in what you think, say and do. People trust other people when they have good intention and do what they say they will do. Similarly, people trust businesses that have good character and deliver on their brand promises. To establish consistency of thought, words and action, a business needs to align the three organisational dimensions of culture, communications and customer experience.

1. **Culture** reflects what an organisation thinks – expressed through its beliefs, values, sense of purpose and traditions.
2. **Communications** reflect what an organisation says – expressed through the brand identity, imagery, stories, language and tonality it conveys.
3. **Customer experience** reflects what an organisation does – expressed through direct delivery of its products and services, and interactions it facilitates via customer touchpoints and marketing channels.

When culture, communications and customer experience are aligned – that is, when organisational beliefs, values and a strong sense of purpose (culture) are embedded within marketing messages, branding and channels (communications), and then faithfully delivered upon through the product/service (customer experience) – credibility and trust are built from the consistency of thoughts, words and actions.

This alignment of culture, communications and customer experience also creates more cohesive and engaged teams, because the thinking, language and behaviours of employees are based on a common purpose and shared understanding of organisational vision and values. Over time, this consistency improves organisational results, relationships and reputation.

Conversely, when culture, communications and customer experience are out of sync, organisational credibility diminishes, trust is compromised and reputation suffers due to mixed messages, inconsistent interactions across customer touchpoints, less engaged staff and unfulfilled customer expectations in product/service delivery.

While the three dimensions of culture, communications and customer experience have long been associated with reputation, a fourth organisational dimension has emerged as a key driver of reputation – corporate citizenship.

4. **Citizenship** reflects what an organisation gives – expressed through its sense of public spirit or community mindedness, and its contributions to society beyond its profit-making purpose.

The pandemic and other world crises have seen an increased desire and expectation for brands to stand for more than just profit and products. People want brands to act in socially conscious, purpose-driven ways to help create a better world, and they are making choices in line with this belief.

More than ever, customers are buying for purpose and not just with purpose. And workers are placing greater emphasis on joining mission-driven companies aligned with their beliefs and values. In response, there is a rising tide of organisations taking a stand on social, political and environmental issues.

Businesses are joining school students in their protest against perceived political inaction on climate change, governments are mandating policy to ensure gender equity and CEOs are speaking out on societal matters not connected to the bottom line of their companies.

Research conducted in 2021 by reputation measurement company RepTrak®, highlights the importance of corporate citizenship to company reputation. They found that environmental, social and governance (ESG) performance was among the top three factors determining whether someone will buy from, trust or recommend a company. ESG was also the number one factor influencing whether stakeholders will give the benefit of the doubt to a company during a crisis.

"...building a great reputation comes from being consistent in what you think, say and do."

Doing good not only drives a positive reputation, it's also good for health and wellbeing, and this can have further positive flow-on effects for businesses. While individual employees benefit from a sense of fulfilment when they contribute to the greater good, when doing good is done collectively, morale is boosted and employee engagement increases.

By aligning the four organisational dimensions of culture (think), communications (say), customer experience (do) and citizenship (give), you'll not only enhance your reputation, but you'll also build a brand people want to work, buy from and invest in.

ABOUT THE AUTHOR

Ros Weadman, author of 'Enhance Your Reputation – how to build a brand people want to work for, buy from and invest in' (Global Business Publishing, $29.95), is a brand communication and reputation specialist who combines her professional expertise in strategic communications, psychology and education to help organisations build a purpose-driven brand and strong positive reputation.
Find out more at www.rosweadman.com

How To Become A Fully Connected Leader

BY MEL KETTLE

My favourite get-to-know-you question is 'what does connection mean to you?' While everyone has a different answer, there are common themes.

1. 'Connection is a two-way relationship between people.'
2. 'Connection is a willingness or a shared agreement to be vulnerable.'
3. 'Connection is not about what you're doing, it's about who you are being.'

I genuinely believe that connection starts with you. Before we can be connected to others, we need to be connected to ourselves. We need to know what makes us tick. We need to put ourselves first. It is more important than ever to connect with ourselves.

Leadership – and life – is getting harder, making it increasingly difficult to find the time and energy to put ourselves first. However, if we don't first look after our own health and wellbeing, how can we bring our best selves to work? Self-care isn't selfish. Yet when we face increased pressures with work and life, it can be hard to put ourselves first.

Too often, we are afraid of others' reactions to our vulnerability. Add to this the growing epidemic of loneliness negatively impacting our health and increasing the risk of anxiety and depression. Is it any wonder we so often struggle to connect with ourselves?

The noise and pressure of technology and social media also challenge our ability to filter out the unwanted and unhelpful. And then, of course, we are dealing with the ongoing impact of COVID-19. All of which contribute to our lack of connection with ourselves and others.

FULLY CONNECTED LEADERS THRIVE

They take back ownership of their lives, reclaim their health and have stronger relationships. They energise their workforce, communicate with conviction and create cultures of belonging. I speak with many CEOs who say:

'It's really lonely at the top. I didn't expect that.'

'Everyone wants a piece of me – my staff, my board, our customers, my wife, my kids. I don't have any time for myself.'

'I feel like I'm on a never-ending cycle of stress, alcohol, not sleeping and anxiety meds, and I don't know how to stop it.'

Sound familiar?

Leadership - and life - is getting harder, making it increasingly difficult to find the time and energy to put ourselves first. However, if we don't first look after our own health and wellbeing, how can we bring our best selves to work?

"It's really lonely at the top. I didn't expect that."

FIVE WAYS TO BECOME FULLY CONNECTED

Becoming fully connected is not easy, but it's worth it. There are five things we need to focus on if we want to become a fully connected leader.

1. Know your personal story: Your story will have good, bad and ugly bits, and these all define your past, present and future. Mindset coach Ben Crowe says, 'When you know who you are, and you can own your story ... you don't get distracted by these expectations of others or expectations of the outcome.'
2. Know what you stand for: What are your values, strengths, attitudes, and behaviours? Having a solid understanding of these means we can see ourselves more clearly.
3. Do something that gives you joy EVERY DAY: If you have forgotten what joy looks like, then make a list of what you loved to do as a child. Do one of those things today. If life right now is really hard, then plan your joyful activity before you go to bed, so you have something to look forward to tomorrow.
4. Know what gives you energy and what saps it: Some of the common elements include nutrition, exercise, sleep, doing work you love and being mentally fulfilled, and spending time with people who lift you up. Now think about how you spend your day. Are you all-systems go from the moment you get up? Do you have a jam-packed to-do list? A never-ending collection of emails to answer? A calendar filled with meetings? If this sounds familiar, it's no wonder you're tired.
5. Prioritise self-care: Self-care looks different for us all. For me, it's a walk on the beach at least five times a week and reading crime fiction while sitting on my daybed with a cup of tea or a G&T.

   It also looks like regular medical appointments to keep on top of my physical and mental health. If you haven't been to the doctor in a while, make an appointment today to make sure that all your bits are doing what they should be doing.

It's easy to get busy and forget to take care of ourselves. And yes, change can be scary, especially when it requires deep work to get to know yourself better. But life is really short, so please, prioritise yourself, reclaim your energy and do what brings you joy.

ABOUT THE AUTHOR

Mel Kettle is an internationally recognised expert at fully connected leadership and communication. With more than two decades of experience, Mel is a valuable asset to leaders and teams that want achieve real connection and sustained engagement. She is the founder of the award-winning menopause blog, Just as Juicy, host of podcast This Connected Life and author of two books, Fully Connected and The Social Association. Visit www.melkettle.com

INFORMATION GOVERNANCE:
Data, Technology, Frameworks And Policies

BY LINDA SHAVE FRIM

"AI is probably the most important thing humanity has ever worked on." - Sundar Pichai, CEO of Google 2020.

INFORMATION GOVERNANCE VS DATA GOVERNANCE

Information Governance provides a strategic framework for organisations seeking to control organisational information. It ensures that the roles, policies, processes, and measures required to manage the information lifecycle, including the disposal of information assets, are in place. Its primary mission is to maximise the value of information, whilst minimising the costs and risks of holding it. Information governance describes how data is controlled within the organisation to meet regulatory, environmental and operational requirements, reduce risks and the consequences of data breaches.

Data governance is a subset of information governance. It aims to control information at the data level, ensuring effective data management measures are in place for accurate, high-quality and trustworthy data, through the implementation of appropriate systems and processes.

Data governance relies on the implementation of data policies and processes for the management, cleansing and storing of data and follows strict standards, best practices and procedures. Data governance is mainly concerned with things like data quality, master data management, visualisation and dashboards.

Information governance and data governance are both intensifying in importance as the volumes of data being captured and held by organisations continue to increase at exponential rates.

In brief, information governance ensures that the business value of information is maximised, and the risks and costs of information are minimised. Data governance ensures that the data being held is accurate and trustworthy.

DATA ARCHITECTURE AND SYSTEM DESIGNS - NEXT GENERATION

The complexities of the modern data landscape are expanding rapidly, as new technologies, data types, and platforms are being introduced. As technology innovation accelerates, traditional approaches to data management are becoming unsustainable, resulting in inefficiencies, lack of trust in data, risks to security, privacy and compliance. Many organisations are looking to modernise their data architecture and system designs by leveraging artificial intelligence (AI) and adopting 'next generation architectures and system designs'.

Data fabrics, data mesh, metadata content, Information Architecture and User Experience are four examples of next generation architectures and system designs. These four examples provide agile approaches to data management and further support digital transformation.

"Information governance and data governance are both intensifying in importance as the volumes of data being captured and held by organisations continue to increase at exponential rates."

1. Data Fabrics

Data fabric is an artificial intelligent (AI) and machine learning (ML) augmented data management architecture that provides visibility of data and provides the ability to move, replicate and access data across multiple hybrid and cloud repositories. Data fabric integrates and connects all your organisation's data intelligently and efficiently and is able to manage large volumes of structured, unstructured and/or semi-structured data.

Data fabrics are a metadata driven approach which are dependent on contextual information that integrate with pools of operational metadata and technical metadata. The AI-driven metadata content discovery and data cataloguing are essential to managing, overseeing, and measuring the data governance process. The next-generation platforms will incorporate business semantics and ontologies where data and components are defined and described with different notations. Data fabrics utilise ML to enhance the data quality with learning models that can be trained and continuously learn from patterns to improve metadata analytics and business outcomes.

2. Data Mesh

Data Mesh is an approach based on a distributed architecture for analytical data management. The decentralised technique uses analytical data to customise data products to meet business demands by linking strategic business objectives to drive value. Data mesh distributes data ownership to domain-specific teams that manage, own, and use the data as a product. It enables multiple teams to ingest operational data and build analytical data models to perform their own analysis.

Data mesh enables a flexible data governance operating model that ensures data is discoverable, accessible, secure, trusted, and reusable. Data mesh is more about people and processes than architecture whereas a data fabric is an architectural approach that tackles the complexity of data and metadata.

3. Metadata Content

Metadata content is about cataloguing the descriptions, attributes and the characteristics of the business, technical and operational content that an organisation owns. Metadata content is instrumental in managing, overseeing, and measuring the data governance process. The next-generation platforms will incorporate business semantics and ontologies where data and components are defined and described with different notations.

4. Information Architecture (IA) and User Experience (UX)

Information Architecture (IA) is an approach that focuses on organising, structuring, labelling, searching and navigating content on a website in an effective and maintainable way. The primary goal is to help users find information and complete tasks. In order to do this, the organisation needs to understand:

- How they categorise and structure information (organisation)
- How they represent information (labelling)
- How users look for information (search)
- How users browse or move through information (navigation)

User experience (UX) on the other hand is about the design (wireframes) and the overall user experience on your organisation's website. UX is about the broader experience, interaction, compatibility and accessibility. Can the user easily search, find and navigate your website for the products and services that you offer.

Today's information architecture approaches have generally retained a narrow, web-centric view of using a taxonomy for searching, organising and navigating content in pages within a business internal web page on the intranet. The next-generation information architecture structures will move beyond the organisations internal web page and incorporate business semantics and ontologies for interoperability and findability between traditional services, the metaverse world, the internet of things, smart sensors and cyber-physical systems.

GOVERNANCE, RISK AND COMPLIANCE (GRC) IN A COMPLEX DIGITAL WORLD

Governance, risk and compliance (GRC) refers to an organisation's coordinated strategy, rules, processes and policies for managing corporate governance, enterprise risk management (ERM) and corporate compliance. Traditional models have focussed on:

- Corporate governance highlighting the corporate responsibilities for the structures and processes through which a company controls and directs its efforts towards protecting its interests and becoming more sustainable.
- Enterprise risk management (ERM) refers to the more day-to-day, technical processes that are in place to measure, monitor and mitigate enterprise risk and
- Corporate compliance is about the steps a company takes to monitor standards and regulations in order to meet compliance requirements, run safely and legally.

With globalisation there is a new breed of risk, such as cyber-attacks, cloud security and data quality, that requires rethinking governance, risk and compliance (GRC) models.

Intelligent automation (IA) and GRC models that support a complex digital world are needed. Intelligent automation (IA) allows for the capability of automating non-routine tasks that require making decisions based on systematic consideration. IA is underpinned by cognitive technologies such as artificial intelligence, robotic process automation, natural language and machine learning that can recognise images, patterns and learn from observing humans. When intelligent automation is integrated with the use of powerful analytics, these combined cognitive technologies can directly assist in the performance of tasks such as governance, risk and compliance.

THE VALUE OF INFORMATION AND THE ROLE OF DATA SCIENCE

When it comes to data, however, volume is not the sole indicator of economic value. Most of the organisation's data is unstructured which makes it difficult to identify the potential value and therefore its true value can remain unrealised. The emergence of Artificial Intelligence (AI), machine learning (ML) and data analytics are opening the doors for organisations to improve efficiencies by identifying patterns, unlocking opportunities and predicting future scenarios.

Moving forward data science will play a crucial role within an organisation. Data science is an umbrella term for a multi-disciplinary field that uses scientific methods, processes, algorithms and systems to extract knowledge and insights from structured and unstructured data. Data science also combines multiple fields, including statistics, scientific methods, artificial intelligence (AI), and data analysis, to extract value from data.

MANAGING INFORMATION ASSETS

As organisations increasingly store structured, unstructured, semi-structured and sensor data across multiple data warehouses, data lakes, and hybrid clouds, these information assets become difficult to find, analyse and manage. One good way of managing your information assets is to identify what information assets you have by producing an information asset register (IAR). An information asset register (IAR) captures, controls and monitors your organisations information assets that have been identified as having value. The key purpose of the IAR is to document the links between your organisation's information assets and its business requirements.

Embarking on an IAR requires you to think about how your organisation will find the information, value it, use it, who is responsible for it, how does it link back to business processes and how will it be continuously monitored? For example, ask the following questions:

1. How will you find the information (For example, business applications such as customer resource management (CRM) and financial databases etcetera)?
2. How will you value and prioritise the information assets?
3. What and how do you need to work with and understand your information?
4. Which people and/or positions are responsible for particular information assets?
5. How does the information link back to your business processes?
6. What information is being collected?
7. Where is the information being stored?
8. Who are you sharing the information with?
9. How do we identify and manage obsolescence of software and technology?

With globalisation there is a new breed of risk, such as cyber-attacks, cloud security and data quality, that requires rethinking governance, risk and compliance (GRC) models.

THE FUNDAMENTALS OF LEGAL DISCOVERY

Data discovery is perhaps the most technically rigorous and complex of all the electronic discovery (e-discovery) stages. Data discovery involves the interrogation, indexing, preservation and the collection of documents in the legal discovery process. In the context of data discovery, preservation is focussed on ensuring potentially relevant data is not deleted. Legal discovery on the other hand is around the ingestion, processing, review and production of potentially relevant electronically stored information (ESI) from its native source. There are a number of legal discovery components, below is a list of three of the most common forms deposition, request for production and request for admission:

1. Deposition (This is one of the most common forms of discovery)

Depositions are statements given under oath by participants involved in a case while outside of court. These can be made by written transcript and/or video and used both in preparations for trial and frequently during the trial itself. During oral depositions, both sides have the right to be present.

2. Request for Production (RFP)

A request for production is a written request from one party to the other requiring a person to produce physical evidence. These documents may exist as physical papers but could also be electronic files. When seeking a request for production, attorneys must be clear about what they want produced, or the opposing side may object on grounds that it is too broad in definition.

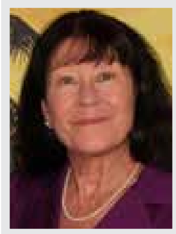
3. Request for Admission (RFA)

A request for admission is a written statement used to establish basic facts and avoid having to establish them in trial.

THE FUTURE OF INFORMATION GOVERNANCE

In conclusion, the digital world we are currently living in has significantly changed our lives over the past few decades. This digital epoch shifted the way human beings interacted and communicated with one another. We are now embarking on a new journey - a voyage to a quantum era.

The quantum era will see similar disruptive impacts as we experienced in the digital one. Quantum technologies will penetrate and influence our lives in undreamed-of ways. Quantum computers will not only store more information than today's classical computer binary system but carry out complex calculations simultaneously at much faster speeds. The outcome will be to drive the need for new approaches to information governance, data, technology, frameworks and policies.



ABOUT THE AUTHOR

Linda Shave FRIM, is acknowledged as a thought leader and architect of change. She is a researcher, consultant, educator 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**

Let Governance, In Information Governance, Mean Governance

BY CRAIG GRIMESTAD

Some say Information Governance (IG) is Records and Information Management (R/IM) rebranded. The same thing, but another name. IT IS NOT. According to Dictionary.com, governance means the exercise of authority, control. So more than just management, governance is the setting of policies, actions, and conducting affairs.

Information Governance for an organization includes defining the data and information to be acquired or created, establishing a process that manipulates or processes that data and information, and then creating records in a prescribed way that satisfies the business need. Finally, it also includes storing these records in predetermined locations, providing appropriate access to individuals, and then directing the disposal of records once the life cycle has reached its end. Information Governance is Records and Information Management come of age. Information Governance now has structural and performance maturity standards, and certifications available for practitioners.

WHY PURSUE INFORMATION GOVERNANCE?

Practitioners have often tried to motivate organizations to pursue Information Governance to reduce risk. While it does reduce risk, reducing risk doesn't easily or necessarily translate into saving money. The better motivation for an organization to mature their R/IM function into an IG functional organization, is the advantage of saving money by becoming more efficient in the creation, use, management, storage, and disposal of information, optimizing the utilization of resources and manpower, and becoming the low-cost organization in their business sector. That message will get an organization's attention.

BUSINESS STRUCTURE

In an organization that has fully implemented Information Governance, Information Governance will be its own organization, flying at the top of the pole for that organization. In a fully implemented and functional program, IG will have both Compliance and Information Technology reporting into it. Both of these organizations represent high-value support activities necessary to accomplish the higher Information Governance objective.

Why should Information Governance fly at the top of the organization's pole? Because Information is an organization's greatest and most valuable asset. Records viewed as common, are actually the lifeblood of the company – nothing moves, nothing

Records viewed as special, such as patents, copyrights, technology, designs, and proprietary processes, represents what is an organization's value, and are what sets an organization apart from its competitors.

happens without them. Records viewed as special, such as patents, copyrights, technology, designs, and proprietary processes, represents what is an organization's value, and are what sets an organization apart from its competitors. Information Governance provides a structure and operating practices that provide for the creation, use, management, storage, and disposal of information, at the lowest cost.

While the organization is transitioning from a Records and Information Management activity to an Information Governance authoritative organization, it would be well to assure that Information Governance is positioned within an organizational "Power Player", probably Legal, during this transition. Psychologically the organization is more accepting and responsive to governance directions coming from a traditional power player in the organization. You simply cannot effectively run a governance activity from a service organization. Also, Legal understands records are corporate assets that require maintenance. They also understand how records can transition from having high value as an asset, to becoming a liability when the life cycle is complete.

INFORMATION GOVERNANCE OPERATIONAL CHANGES

Companies spend a lot of money on the lifecycle of records, to create, use, store and dispose of records. Almost every employee has a part in one or more stages of the record lifecycle for one or more records. The resulting variability and inconsistent practices yield a mix of good records management practices, and wasteful records management practices. As information governance is applied, the variability and inconsistencies are reduced, as the processes become defined with more effective use of resources. As Information Governance matures, the variability tends toward zero and the efficient use of resources is maximized. For many employees tasked with a role in a mature process under Information Governance, there are no individual liberties, no place for individual expression, unless one is asked to be creative in a specific situation. Otherwise, the objective is clear, the task is defined, the path is established, and the result is certain. No waste, no lost energy.

There are many examples of non-efficient practices, ripe for improvement under Information Governance. Here are some at the tip of the iceberg:

Records Creation

1. When developing a record, report, or presentation, does the individual start with a fresh canvas, or is there a template where new or updated information can be applied?
2. Are reports generated with extraneous information that has no value for the subject at hand, or to the recipients?
3. Are multiple individuals entering the same information (or at least it should be the same) into different locations, such that the entire data and information is found in multiple repositories or applications? Individuals then need to figure out which is the most current, not to mention the waste in duplication.

As Information Governance matures, the variability tends toward zero and the efficient use of resources is maximized.

Storage

1. Is there a designated place (an approved Records Repository) for the storage and retrieval of all data, information, and records? Or do individuals have their own store house of data, information, and records, in combination with departmental and organizational locations?
2. Is there a data owner assigned to records, with designated responsibility for storage, retrieval, and disposal initiation?

I digress, but it's been said that individuals commonly spend 20% or more of their time searching for records and information. Say for starters, as IG is applied, that time is reduced by 5%. How much is 5% of your company payroll? Perhaps you cannot utilize that savings directly, but perhaps you now have time for projects that you never quite had time for previously?

Disposal

1. Are all of the records disposed of per the Record Retention Schedule requirements along with all courtesy copies? If not, you are incurring extra storage and maintenance costs.
2. Is there a data owner assigned to records, with designated responsibility to oversee records disposal when the required retention time has come?

Obstacles

None of the information and perspective provided here are new, so why are we not seeing major movement in organizations transitioning their R/IM programs into Information Governance as an operational business function?

Three reasons come to mind:

1. Leadership hasn't fully embraced the concept that records are a company's greatest asset.
2. Leadership doesn't comprehend the cost benefit of implementing Information Governance
3. Leadership is reluctant to transition from Records and Information Management as a service organization to Information Governance as an authoritative organization. In part, because they understand the challenge and certain resistance from the workforce and the current entrenched organization's staff.

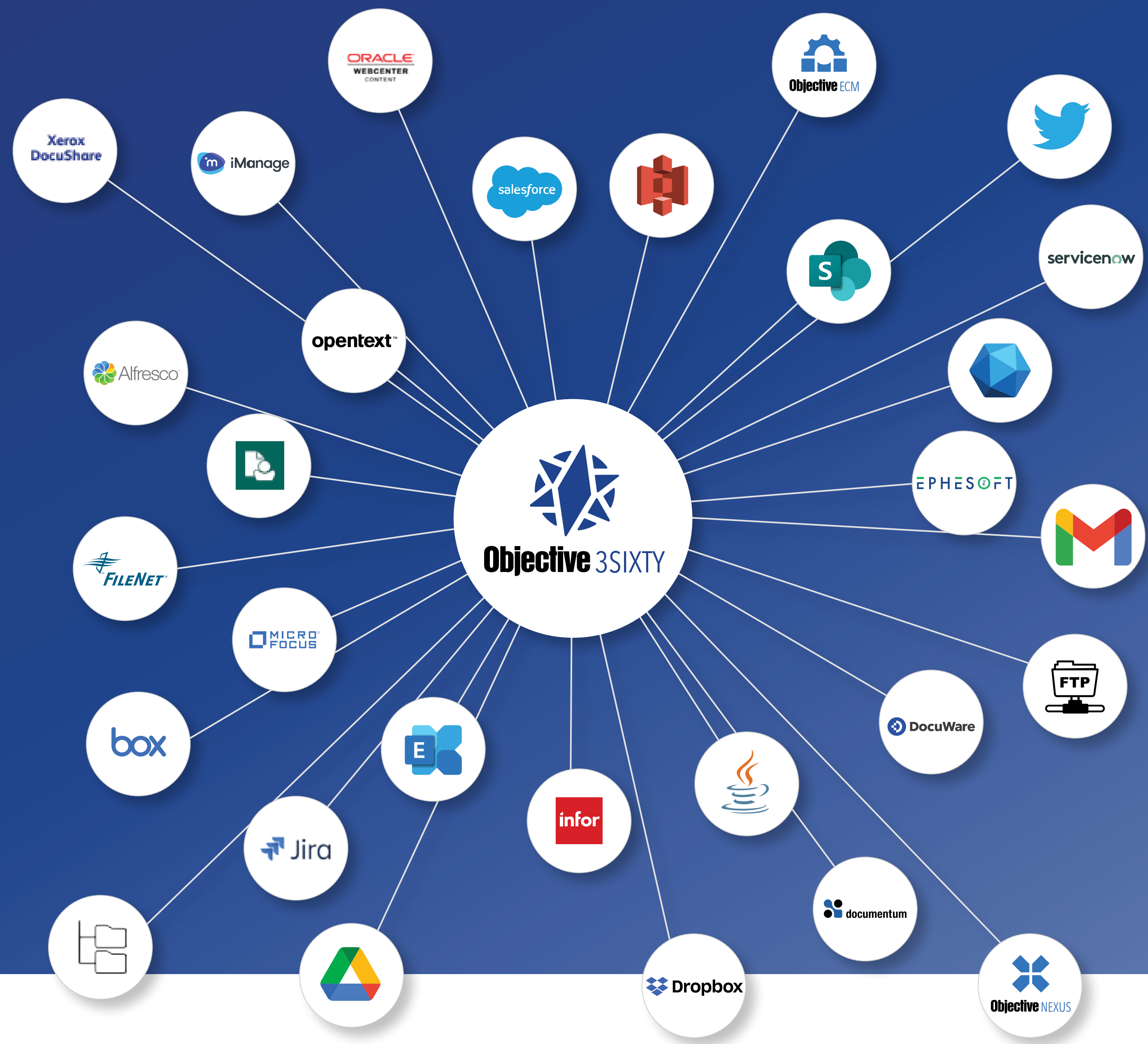
Information Governance will save an organization money and cause it to operate more efficiently as it transforms the way the organization operates. As Information Governance matures, it will improve and guide the optimal use of people and resources.

Do you want to have the lowest operating costs in your business sector?

Then IG is your path. Perhaps not today, but one day IG will be an imperative to successfully compete. In the meantime, do you want to lower your operating costs and enjoy the benefits, while your competitors play catch up? Or do you want to watch your competitors lower their operating costs, and then have to catch up with them?

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**



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Top Information Governance Principles For Your Mailroom

ERIC LYNN WRITTEN ON JULY 4, 2022.

Published in partnership with ARMA International

Do information governance principles apply to your organization's mailroom? Mail has typically been a perfunctory function aligned with other physical office services, but for many organizations, the COVID-19 pandemic has shifted mail to a critical—and digital—operation.

Mail workflows include sensitive client information, launch new work, and therefore often billable activity. This means matter-centric record creation is starting right from mail delivery, not later from a pile on a desk—even if it is a digital pile on a virtual desk. Protection and integrity of client information have always been a top priority of information governance and scanning to a digital format does not negate the obligation to sort this information correctly from the beginning of the process.

Because scanning and document description is involved, creating a digital mail distribution process includes several technical considerations. This includes issues of data compliance, availability, transparency, and accountability for those processes. In short, no matter who this process belongs to in the organization, it needs to be a part of a well-thought-out information governance policy, and refined on an ongoing basis, just like any other records management workflow.

Let's simplify to just three areas of focus for your current digital or soon-to-be-digital mailroom operation and apply ARMA's Generally Accepted Recordkeeping Principles® (Principles) to those areas of focus.

The principles "constitute a widely leveraged global standard that identifies the critical hallmarks and a high-level framework of good practices for records management, records and information management (RM/IM), and information management programs." The following are the eight Generally Accepted Recordkeeping Principles:

- The Principle of Accountability
- The Principle of Transparency
- The Principle of Integrity
- The Principle of Protection
- The Principle of Compliance
- The Principle of Availability
- The Principle of Retention
- The Principle of Disposition

The greatest success of a mailroom modernization project is standardization across all locations and practice areas which cannot be achieved without strong support from senior leadership.

STAKEHOLDER CONSULTATION

This all-important key sponsorship ties the digital mailroom (DMR) to the organization's ever-growing maturity on conversion to digital files. Setting expectations of 'maximum electronic delivery and storage' for overall organization efficiency helps create the all-important buy-in from senior management. The greatest success of a mailroom modernization project is standardization across all locations and practice areas which cannot be achieved without strong support from senior leadership. A documented, smooth-running mailroom can only be achieved with a design driven by:

- Accountability from senior management, and
- Transparency of purpose toward overall recordkeeping goals.

PROTECTION OF SENSITIVE DATA

This concept is paramount in today's environment (see the current LIFGS white paper on Client Information Governance Requests). Monitoring and auditing tools such as log of mailroom processes must be used to trust and verify information as well as safely satisfy internal and external compliance and potential audit criteria.

Much of an organization's mail will end up classified as a record, so every bit of accurate metadata added along the way adds integrity to these document classifications and the overall process.

Firms must maintain a comprehensive chain of custody—or cradle to grave—from mail receipt and opening, sorting/naming/scanning, through a short physical retention and shredding.

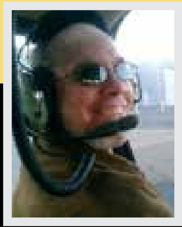
Adding further to the integrity, records management policy should be amended to start in the mailroom, rather than only documenting records at the time of transfer to longer term storage repositories.

COMPREHENSIVE CHAIN OF CUSTODY

Firms must maintain a comprehensive chain of custody—or cradle to grave—from mail receipt and opening, sorting/naming/scanning, through a short physical retention and shredding.

In cases of, admittedly, necessary secondary physical delivery, it is important to minimize and document that process. Adding documentation at this step like "We mark here in the log that we were asked to drop it off at a desk after scanning the envelope," is crucial to maintaining the chain of custody in these situations.

Providing fast and appropriate availability of mail items along the way to careful and documented disposition, makes an organization more competitive, as well as providing a defensible protection strategy for its files.



ABOUT THE AUTHOR

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Build and Sustain Your Records Program With A Records Management Playbook

BY JESSE WILKINS

Published in partnership with ARMA International

What if your organization's entire records team won the lottery today and quit? What would happen to your records program? How long would it take your organization to rebuild the team from scratch?

If you had a records management playbook in place, your newly hired team could hit the ground running!

WHAT IS A PLAYBOOK?

In sports, a playbook describes the "plays" a team executes to accomplish its goals and objectives—generally, winning a game or match. Plays are tailored to specific circumstances: the team's personnel and capabilities, the opponent's capabilities, and the specifics of the in-game situation. Some plays just do not come up very often, while others are executed regularly throughout the game. Some plays only come up at the end of a period of play or towards the end of the game. And once the game is over, the coaching staff reviews the plays and the team's execution of them and makes changes to get ready for the next match.

Similarly, a business playbook describes the plays that a particular organization, department, or work process executes to accomplish its goals and objectives. Larger or more mature organizations might have multiple playbooks, while smaller or less mature organizations might have everything in a single playbook.

In this article, we will focus on the records management playbook—the list of plays that a records program will execute on an ongoing basis. Different records programs will operate at different levels of maturity, so some programs will include more plays in their playbook than others. Similarly, different organizations have different cultures, and the playbook needs to reflect those realities as well.

So how is this different from a standard operating procedures (SOP) manual? The playbook is like an SOP in that it lists the things to be done and some detail about how to do them. But plays go beyond just the tasks and activities required to include things like metrics, references, and key players. It also includes cultural values and mechanisms for making decisions when the play is not so clear-cut. We will look at the structure of the playbook and the plays in more detail later in this article.

It is also the case that in many organizations, SOPs were written years or even decades ago. Because they tend to be scattered around the organization, they are not maintained well; and because of that, there is often a significant divergence between what the SOP says in describing a process and how that process actually gets done. Again, the playbook can provide value by having everything in one place and in a readily maintainable format.

Through a playbook, the organization can:

- Identify and implement best practices and standards
- Ensure that operational practices are consistent, repeatable, and standardized to the extent possible
- Ensure resources and priorities are aligned to common goals
- Train new employees to perform within the guidelines, become a part of the desired culture, and develop shared values
- Ensure that important expertise, on which their business results depend, does not walk out the door when employees are unavailable, transition to a different role, or leave the company

The records management playbook's objective is to provide best practices for the records program, not to substitute for management and leadership. It is critical to balance the importance of standards and guidelines with the value of local management discretion and individual employee creativity [1].

Another way to look at the records management playbook is that it contains what someone would need to know to execute the various tasks required to sustain the records management program over the course of thirty, sixty, or ninety days—even up to a year. What are the things you do, create, monitor, or report regularly? What are the questions you answer every day or every week? These should be in your playbook.

The playbook is a living document. As the team develops new processes, they should be turned into plays and added to the playbook. As the team updates, streamlines, or adds processes to reflect changes in the organization, its technology, or legal or regulatory requirements, the team should also update the plays in the playbook. The playbook thus becomes the sole source of truth for all things involved with and related to your records program.

What are the things you do, create, monitor, or report regularly? What are the questions you answer every day or every week? These should be in your playbook.

"...plays should include some amount of flexibility, because things change, and sometimes the circumstances require that a play be executed differently. Inflexible adherence to whatever is described in a particular play may miss something..."

WHAT THE PLAYBOOK IS NOT

At the same time, the playbook should reflect the reality of what is done and how it is done. It makes no sense to write a play about disposing of legacy emails if legacy emails are not in fact being disposed of. In other words, it is not a list of best practices and the ideal world if time and resources were no object. Rather, your playbook should be accurate as to what you are currently doing, and as your program matures, those changes should be reflected in the playbook

It is also not a list of how some other organization does things. A different organization, even in the same industry and jurisdiction and similarly sized, will have a different level of maturity, different organizational culture, and different personalities involved. It might be helpful to look at another organization's records management playbook for ideas and completeness, but you should not try to implement its playbook as-is in your organization.

This also means that plays should include some amount of flexibility, because things change, and sometimes the circumstances require that a play be executed differently. Inflexible adherence to whatever is described in a particular play may miss something and will tend to encourage employees to ignore it. Again, with effective leadership and management, this sort of flexibility should not be a major issue.

Similarly, it is helpful to distinguish between plays that are executed on some sort of a regular basis, with projects which may be executed much less frequently. For example, how often will you change recordkeeping applications? You probably don't need a "Select and Implement New Recordkeeping Application" play in your playbook. You need a process to follow, to be sure, but that is not a play.

THE BENEFITS OF USING A RECORDS MANAGEMENT PLAYBOOK

The benefits of having and using a records management playbook include [1]:

Organization: The playbook includes all the information your records management team needs to operate successfully, in one organized and easy-to-access place.

Efficiency: The team can save time when they have questions about workflows or procedures because the answers are in the playbook. They can follow the steps outlined in the document rather than searching through numerous files, locations, and resources to find information. And if it is digital, and why wouldn't it be, supporting resources can be linked directly within the play.

Work quality: The playbook includes references, standards, checklists, and templates that align with the organization's existing policy and quality frameworks. Work output will become better and more consistent as a result.

Employee training: A playbook makes it easier to onboard new team members and roles and helps them get up to speed quickly.

Independence: Employees can refer to the playbook instead of asking their managers for help for those plays that are included in the playbook. Similarly, supervisors can trust their employees to do quality and accurate work without constant management because they have a playbook for guidance.

THE STRUCTURE OF THE RECORDS MANAGEMENT PLAYBOOK

The records management playbook is intended to be self-contained; that said, there is a trade-off between being comprehensive and being unwieldy, especially for an organization with a mature records management program. In that case, it makes sense to focus only on the plays, and move the other elements listed below into supporting documentation. It may even be worth breaking the playbook into two or more parts—for example, records management processes and records program processes.

Depending on how you build and publish your playbook, it may make more sense to link to your supporting documentation—the detailed procedures, checklists, flowcharts, standards, and anything else that supports a particular play.

The playbook will have three distinct parts: the introduction, the actual plays, and any appendices.

THE INTRODUCTION

This entire part should be brief—no more than a page or two for each section, and shorter is better. Some organizations leave this section out entirely and make this content available as a separate, supporting document. The introduction, if included, should set the stage for the playbook. It could include any of the following sections.

Introduction to the playbook. Much of this is included in the first section of this article.

Introduction to the records management program. This should introduce your records management program: its purpose and how it supports organizational outcomes. It should also outline any unique aspects of how your records management program works within your organization—for example, unusual administrative or reporting requirements. Again, will often vary for different jurisdictions or industries.

Organizational context. This helps to orient new staff to the organization and the plays in the playbook. This section would include:

Organizational mission: What does your organization do, and what does its legal and operational environment look like? These can help those reading the playbook to have some additional context over why the plays are the way they are. For example, a law firm's records program must deal with client records, while a government agency may have to deal with Freedom of Information or open records-type requirements.

Organizational culture: Is your organizational culture more focused on reducing and managing risk, or on accepting reasonable risks that are relatively low impact? Do you encourage people to be creative, or to follow directions closely? Again, these can shape the granularity and level of detail in your plays.

Definition of roles and responsibilities: These are the roles involved in the execution of the records management program, directly and indirectly, and who would be included on a RACI (responsible, accountable, consult, inform) chart. A large and mature records management program might include the following individual roles: director of records management, records manager(s), records analysts, and/or records coordinators. It might also include some sort of a steering committee. A smaller or less mature records management program might have a single person, with a non-records related title, or even be a part-time role. Indirect roles might include those with which records management team members need to collaborate, such as IT, or whose approval is required under certain circumstances such as Legal signing off on policy changes.

Depending on how you build and publish your playbook, it may make more sense to link to your supporting documentation

Each play should include several standard elements. This makes it easy to maintain them and to add new plays over time.

THE PLAYS

There are hundreds of potential records management plays that could be included in a records management playbook, and there are certainly many more that would be unique to jurisdictions and industries. But as noted earlier, the playbook should contain the plays that the organization actually executes. It should not include such an exhaustive list of plays, many of which are not in place or even contemplated yet.

For a more mature records management program, it may make sense to group plays into categories, so they are easier to access and manage. Here are some broad categories of records management plays—but there are a couple of points to keep in mind. First, each of the categories below may include several to many individual plays.

Second, some of these categories may not seem specific to the records program, but the individual plays would. For example, plays under the decommissioning legacy systems category would focus on records appraisal, disposition of legacy records and information, and so forth.

Finally, this list does not include any standard management or project management plays, which are also necessary and may be part of the records management program, such as budgeting, defining business requirements, marketing and championing records management, records management system administration, and so forth.

Potential categories of records management plays for the playbook:

- Capturing and filing records
- Digitizing paper records
- Responding to requests for records
- Conducting records, information, system, and process inventories
- Developing metadata and classifications schemes
- Maintaining the records retention schedule
- Applying retention and disposition
- Reviewing and updating governance documents
- Migrating records
- Decommissioning legacy systems and user information stores
- Remediation of redundant, outdated, and trivial information
- Evaluating systems for records management capabilities
- Change management
- Assessing and auditing the records management program

Depending on your organization and approach, you might also include "records management-adjacent" plays such as privacy and data protection, e-discovery, archives, or document control.

THE APPENDICES

Appendices can include anything that would be helpful to those using the playbook to sustain the records management program. For example, if your organization has conducted a maturity assessment, such as the one aligned to the ARMA Information Governance Implementation Model, the results could be included as an appendix. We mentioned earlier the possibility of including a full RACI chart with contact information as an appendix. A full list of references and resources might be helpful as well—not just organization-specific resources like policies and procedures, but also things like industry standards and reference works. A glossary and list of acronyms and abbreviations may also be of value.

THE STRUCTURE OF A RECORDS MANAGEMENT PLAY

Each play should include several standard elements. This makes it easy to maintain them and to add new plays over time.

Name. This is the name of the play and should take the form of "verb-noun," e.g., "Send Boxes to Offsite Storage." Make sure that the name accurately describes the play using your organization's terms.

Purpose. Why is this play in the playbook? What is the business value of executing this play?

Description. The overall description of what is required to execute the play. This should include enough information for someone new to be able to follow the steps in the play but should not necessarily be a fifty-nine-step checklist—rather, it should describe the intended outcomes. If there is a fifty-nine-step checklist, we can link to that in the references below.

Players or responsibilities. The play should identify the primary role responsible for executing the play. Since different plays will have different players, I like adding a mini-RACI chart for each play, and then rolling up all the individual RACIs into a full RACI chart either at the start of the playbook or as an appendix. It is up to you whether to include a point of contact—for maintenance purposes, it may be easier to include contact information as part of the full RACI chart if you create one.

Cadence. This refers to both the frequency of the execution of a play as well as the actual timing. For example, your "Send Boxes to Offsite Storage" play might be done every month, but only once a month, and only at the end of the month.

References. List all the things that can support the efficient and successful execution of a play: policies, procedures, guidelines, checklists, templates, standards, job aids, etc. If you can link to these so they are immediately available, even better; some ideas follow in the section on building the playbook.

Metrics. As the old management truism states, "if you can't measure it, you can't manage it." Every play should have at least one metric that is relevant to how and why it is executed and that aligns to the overall goals of the organization. These should be quantifiable to the extent possible, and if you can get a financially quantifiable metric, that is even better.

HOW TO BUILD THE RECORDS MANAGEMENT PLAYBOOK

The actual process of building a playbook is fairly straightforward. The two key challenges are in determining what plays to include and what platform to build it on.

Here is an example of an actual playbook play.

Play: Send Boxes to Offsite Storage

Many records are required to be kept for longer periods of time than they are actively accessed and used, because of legal or regulatory requirements. Those records can be stored in our offices, but those take up valuable office space and we pay for that space. We save significant money by moving inactive records to StorageCo, our offsite storage vendor, and freeing up that space for more productive uses.

When records are ready to be moved offsite, the records analyst will inventory each box and place a copy of the inventory sheet inside. StorageCo will pick up the records around the 25th of each month. Once the records are stored in their warehouse, they will transmit tracking information to the records manager, who will update the records management system with that information.

Responsible	Accountable	Consult	Inform
Records Analyst	Records Manager	Offsite storage vendor	Records owner

Schedule:

- Upon request from business owner, no more frequently than monthly

Relevant policies and procedures:

- Records policy, last updated 12/15/2021
- Physical records offsite storage process, last updated 4/30/2020
- StorageCo contract dated 1/1/2022

Metrics:

- Number of boxes stored offsite
- Rate of growth or decline, month to month and year over year
- Annual cost of offsite storage

DETERMINING WHAT PLAYS TO INCLUDE

As noted throughout, the plays in your records management playbook should include only those that you execute regularly. But responsibilities and documentation are often scattered across roles and information stores. First, start by reviewing any existing documentation of your records management processes—SOPs, flowcharts, procedures, etc.

Next, review any reports or other paperwork that you generate on a regular basis. These will often help to inform the metrics as well.

You should also review any existing job aids—checklists, glossaries/lists of terms or acronyms, naming convention cheat sheets, and so forth. Do not overlook the records policy and retention schedule—while these are the source of a few plays themselves, the retention schedule in particular often documents other records management-related tasks that result in the creation of records.

Look at job descriptions for the roles on the records management team—but make sure to compare them to the work that the members of the team are doing. Performance reviews can offer value as well, by identifying current expectations and priorities and potential gaps.

Finally, if you are just starting this process, a note of caution. Records management textbooks are a rich source of information, but they could lead you to developing and including many plays that you are just not doing. This can call the value of the playbook into question.

WHERE SHOULD YOU BUILD YOUR PLAYBOOK?

Playbooks can be built as Word-type documents, as spreadsheets, or as PowerPoint-type presentations. There are tools designed for playbooks and similar types of authoring. A wiki can be a great way to build a playbook—each play is its own article, with links to related plays and to all the references and supporting materials.

But the platform and its attendant capabilities do not matter as much as the answers to these questions:

- What platform is easiest to access and use for those who will be using the playbook?
- What platform is easiest for the team to maintain the playbook?

If users cannot use it, or if the team cannot maintain it, it will become shelfware just like the traditional SOP manual.

WHO SHOULD BUILD THE PLAYBOOK?

You! Well, you and any other subject matter experts who can describe the plays and their individual components. Again, in smaller organizations or records management programs this might be the single person running the program; in a larger organization or with a broader playbook, you will need to identify the right people to weigh in.

You will certainly also want to reach out to anyone identified as having a records management responsibility (e.g., through the RACI chart) who is not a formal member of the records management team.

MAINTAINING THE PLAYBOOK

We have stressed throughout this article that the playbook is a living document that needs regular care and feeding to remain relevant and useful. Change is a constant; changes to technology, changes to legal or regulatory requirements, and changes to how the organization does business all require that the playbook be regularly reviewed and updated. In fact, reviewing the playbook should be a play in your playbook!

When the team finds out about a change that will impact a play, someone should be assigned to update the play with a timeline. Similarly, if the team determines a need for a new play, it should be assigned and scheduled. For example, developing a retention schedule the first time is a project. But reviewing and maintaining it are plays; once the retention schedule is finalized, those plays should be defined and added to the playbook.

CONCLUSION

The playbook is a great way to take your program to the next level. It takes some work up front to ensure that it is complete and accurately reflects the way your program works today, but once you have it, you will never look back!

[1] https://www.indeed.com/career-advice/career-development/what-is-a-playbook-in-business

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What Is 'Data Storytelling'?

BY DR SELENA FISK

'Data storytelling' is a phrase that is used regularly in the discussions of the use of data, and it is quickly emerging as an important skill for not just data scientists, analysts, and technicians, but a broader range of employees across all organisations. Microsoft (2022) define data storytelling as "the concept of building a compelling narrative based on complex data and analytics that help tell your story and influence and inform a particular audience."

While this definition is relevant for technicians, all of us require skills to engage with data in a way that helps inform our decisions and be able to ask good questions of the data. However, it's not something that we are necessarily good at, or something that comes naturally to us.

While it might be a tricky skill to learn, we all can engage in data storytelling at a level that works for us, our role, and our company. We can improve and learn with practice, as we do not have fixed intelligences; meaning we can all learn and improve with effort (see Dweck, 2006). To get there, however, there are a few key pieces of the puzzle that we can be aware of, to help us focus our learning and take tangible steps forward.

The first element worth thinking about is data literacy, which is where users need to understand the data that they have, to begin with. Regardless of your organisation, the types of data you have, or the way those metrics are represented, the numbers that are generated mean something unique to you, and the numbers in one data set do not have the same meaning or context as the next.

As Charles Seife said in his book Proofiness: *You're being fooled by the numbers (2010)*,

"... numbers are interesting only when they give us information about the world. A number only takes on any significance in everyday life when it tells us how many pounds we've gained since last month or how many dollars it will cost to buy a sandwich or how many weeks are left before our taxes are due..."

In other words, your percentage profit requires a different understanding to the annual percentage of staff turnover, and the percentage of growth for the business year-on-year. We need to understand the different numbers and what they mean if we have any hope of using them in our work. When it comes to building our data literacy, it can be difficult, because there isn't a one-stop-shop for all the training that your team or organisation would need. There is, however, a lot of small training segments that you could find online to build employee understanding of particular metrics – it might just take you some time to find the right resources for your metrics and your team.

Once we understand the metrics that are being used, we need good visualisations to support our work. Data visualisations are "data that is presented in graphs, tables or other images to make the trends easier to identify, and to reduce the cognitive load of engaging with extensive sets or lists of raw data" (Fisk, 2022), and what we know about good visualisations is there is an art and science to developing them (Knaflic, 2015).

Different visualisations suit different data sets and types of information better than others, but regardless of these preferences, we need to be able to read and interpret the visuals in the dashboards and reports that we are given, and use, on a day-to-day basis. Some visualisations are easier to understand than others, for example, line graphs and bar charts are in the mainstream media regularly, so we are more used to reading information and looking for trends in this way. Box plots or waterfall graphs, however, are not as common and not as well understood – largely because they are not in mainstream media and/or a common part of our data discussions. Whatever you use – ensure that you (and your team) understand how to read and interpret the graphs.

Finally, with good data literacy and good visualisations at our disposal, we can engage in data storytelling. Data storytelling is where the rubber hits the road in terms of using the data in your work, in your team, and to inform your decisions. While it is recognised that data storytelling is key to success in using data well, some of the research that has come out about this practice suggests that only one in 10 companies engage, on a regular basis, with data storytelling (Tischler et al., 2017).

Further, and despite these low numbers, other research indicates that companies do not invest enough financial resources in building employees' data storytelling skills (Amini et al., 2018).

Data storytelling is where the rubber hits the road in terms of using the data in your work, in your team, and to inform your decisions.

When we engage in data storytelling, we seek to answer two key questions through the process:

- What are the insights in the data?
- What will I DO about the insights?

Both elements require practice and support, if this is new. Finding and identifying insights may be difficult for you at first but is worth doing some work on the difference between an insight and information more broadly if you're unsure (hint: you'll have heaps of data – not all of it is insightful). Secondly, even when we have the insights, action does not necessarily follow. Once you are able to ascertain your insights, it's worth thinking about what actions are possible in your sphere of influence, and how you might be able to get others involved in the conversation about what to do with the insights. The more brains the better!

Data storytelling may not come easily or naturally to you, and that is okay, as it is something that everyone can get better at. It's not until we engage with the data storytelling, however, that we actually put our data to work. Without data storytelling, data is just a whole lot of effort, a whole lot of collection and storage, but not a whole lot of impact.

ABOUT THE AUTHOR

Selena Fisk is a data storyteller who works with organisations across Australia to help them make sense of the data that they have. More details are available at selenafisk.com including a data diagnostic on data storytelling that anyone can take for free: **www.selenafisk.com/corporates**

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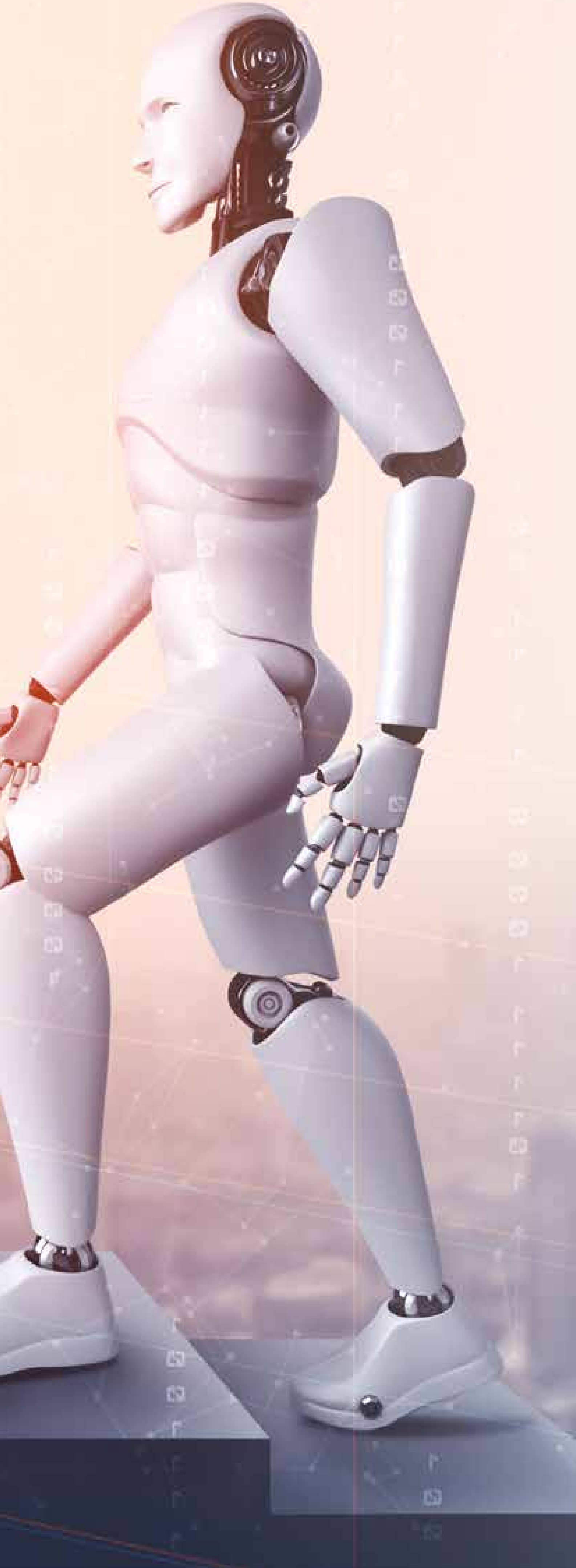
AI Story Writing Has Taken A Giant Stride Forward Thanks To GPT-3

BY DR KEITH DARLINGTON

In the December 2021 issue of iQ, I described the state of the art of AI reading comprehension systems. In the last few years, AI writing systems have also improved significantly because of the emergence of an AI neural network called GPT-3. It is barely two years since GPT-3 was created but the number of use cases is astonishing.

It has paved a path for numerous business start-ups including novel and short story writing, blog writing, chatbots, news report writing, and even quiz generation. In this article, I briefly describe the evolution of AI writing systems and GPT-3.

(www.hallaminternet.com/how-will-gpt-3-impact-your-future/).



AI COMMUNICATION IN NATURAL LANGUAGE

Communication with spoken languages has been a challenging application in AI since its inception. Computer languages have been created and used for programming tasks since the first digital computers were built but they are precise, logical, algorithmic-based languages that are only suited to the working of the machine. These are very different to human spoken languages.

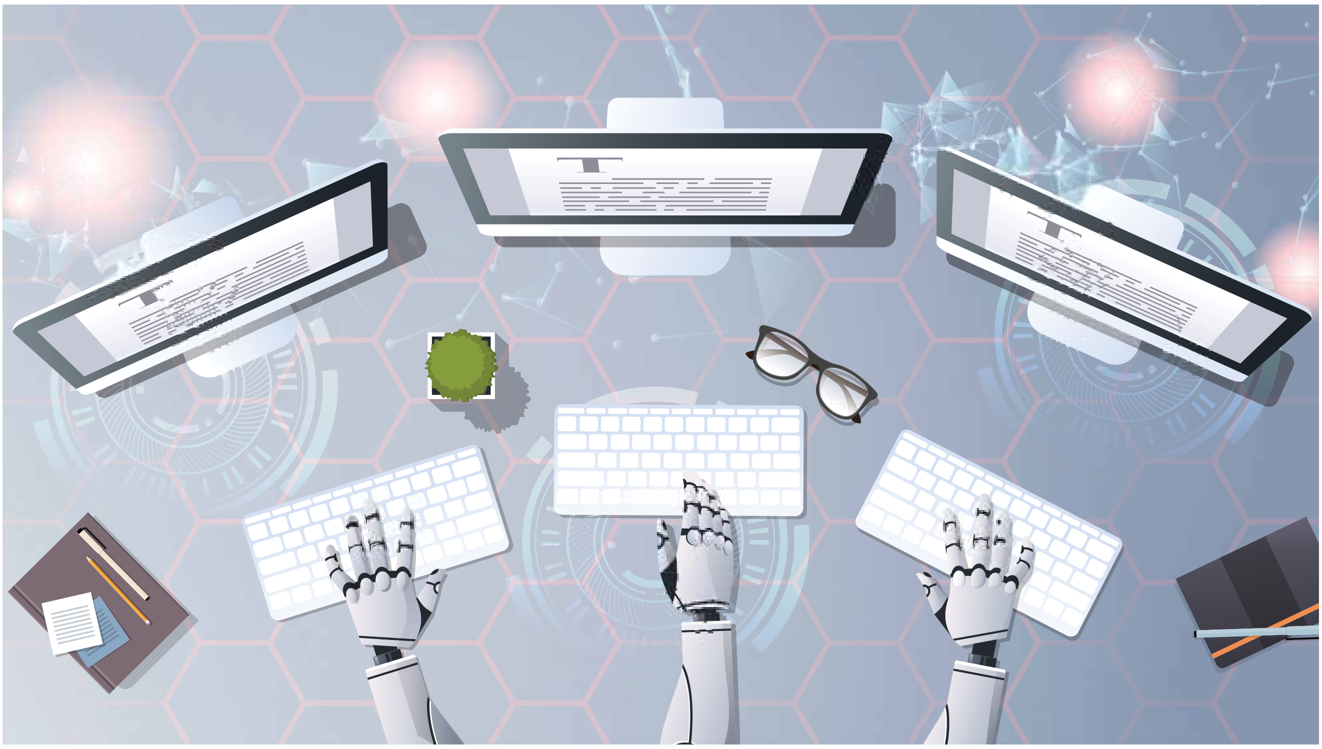
Communication with human language presents formidable obstacles for AI because spoken languages often involve imprecision, ambiguities, and vagueness. Moreover, document writing requires the correct use of syntax and semantics. Correct syntax means that the use of the language conforms to the grammatical rules. For example, the sentence "I not do to like swim" is syntactically incorrect. Semantics, on the other hand, means that the writing complies with our common sense understanding of what is written. For example, the sentence "colourless green ideas sleep furiously", quoted by the linguist Noam Chomsky in 1957, is nonsensical and semantically incorrect.

STORY WRITING USING AI

AI has been experimented with for many years in story writing. For example, Sharples and Perez [1] describe automatic novel writing programs that began in the 1960s, They were mostly collaborations between humans and machines. However, it was a programmer named Scott French who was the first to create an entire AI-written novel. The novel was called "Just This Once" and it was written in such a way that it emulated the style of the 1960s author Jacqueline Susann. It did this by using symbolic AI explicitly written rules. For example, it used "If… then" rules to show how a character would react to an event. However, the writing of this book didn't end well for Scott because he was later sued by the estate of Jacqueline Susann for copying her style. The more general problem with using rule-based AI was that it was very time-consuming – taking eight years for Scott to complete this book.

However, AI can now write novels and many other types of documents using machine learning neural networks – sometimes in a matter of minutes. They have also acquired a level of competency in imitating human writing so much so that readers have difficulty in distinguishing their writing from human fiction thanks largely to the emergence of GPT-3.

Communication with human language presents formidable obstacles for AI, because spoken languages often involve imprecision, ambiguities, and vagueness.



THE IMPACT OF GPT-3 ON NATURAL LANGUAGE APPLICATIONS

GPT-3 has revolutionized AI writing and given rise to many start-ups covering a diverse range of applications. GPT-3 is an acronym for Generative Pre-Trained Transformer Version 3. It was developed by an organization that was founded by Elon Musk, called OpenAI. Its significance in natural language tasks soared during the Summer of 2020.

GPT-3 is a machine-learning language model which means that the user can input from a prompt an incomplete sequence of words and generate text language as output from this prompt. This is similar to the autocomplete that we see when composing email messages. It has been trained with a massive data set of about 175 billion parameters (neuron weights) that were collected from the Internet using Websites like Reddit, Wikipedia, Google, and more – far more text than any human will see during their lifetime.

Generative program training works by inputting a part of a sentence, or text section, and asking it to predict the next word that follows. This output is matched with the correct word. As with all neural networks, the weights will be adjusted according to how well it matches the correct word. As more examples are input, the weights of connections are adjusted so that the network predicts closely the next word.

However, AI can now write novels and many other types of documents using machine learning neural networks – sometimes in a matter of minutes.

Once trained, a user can input a sequence of words and generate a sequence of words as output. Thus, the generative text could be a sentence or paragraph or even more – such as a short story. The user can view a score with the output to see the likelihood of words being used. GPT-3 offers flexibility beyond simply generating text. It can also perform many other language tasks, such as evaluating textual content, answering questions on every conceivable topic, summarising text, and even translating languages.

According to Tingiris [2], it is estimated that GPT-3 has been trained on 57 times the number of words that have been written, read, and spoken, during an average human lifetime. This means that the size of GPT-3 is such that it cannot be downloaded onto a laptop or any business computer.

However, OpenAI makes it available through an Application Programmable Interface or API as they are known. This means that anyone can use GPT-3 with access to the API. Its uses are many and include novel writing, blogs, poetry writing and business reports.

LIMITATIONS AND CONCERNS ABOUT GPT-3

For all its strengths, GPT-3 does have some limitations. It has a prompting window size of about 1000 words. This is enough for short stories but means that an output story may have a tendency to meander when prompted for longer content.

This problem can be largely solved if the user is given follow-up prompts or follows a template. GPT-3 is also quite slow in operation because of its size and that also affects its ability to explain its output. There is also the possibility of bias due to the data that has been used for training the network. There are ethical concerns about GPT-3 – particularly the generation of fake news stories and the possibilities of creating ethnically sensitive content.

CONCLUSIONS

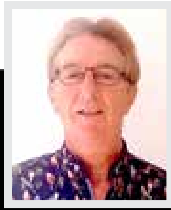
GPT-3 has ushered in a new wave of AI language applications that will lead to improvements in communication with computers. It's also likely to trigger a move towards the automation of Internet documents – such as football match reports. The future of AI language communication has taken a new trajectory as a consequence of GPT-3. But notwithstanding its phenomenal learning capabilities, it still lacks the semantic understanding of language.

Despite appearances, it does not deliver human-level long-story writing capabilities yet because the neural network architecture of GPT-3 provides the learning capabilities without being able to comprehend its meaning. In other words, the chasm of understanding between humans and AI is yet to be bridged.

This means it doesn't have the capabilities to reflect on what it has written – even though what may have been written may well have been done so as competently as a human author. But reflection is an essential part of writing because writers need to ensure that what they have written means what was intended. Hence, the current version works well as a tool to aid writers in generating story content but may still need human collaboration.

Nevertheless, there are many offshoots and directions of GPT-3 that are yet to be explored of this ground-breaking technology. We will be hearing much more about GPT-3 in the future.

The future of AI language communication has taken a new trajectory as a consequence of GPT-3. But notwithstanding its phenomenal learning capabilities, it still lacks the semantic understanding of language.



ABOUT THE AUTHOR

I am a recently retired university lecturer in Artificial Intelligence (AI) living in Wales. My PhD was in AI specialising in explanation facilities for intelligent systems. I graduated in pure mathematics and also taught mathematics and computing during my career. I have written several books in computing and expert systems, and presented several conference and journal papers in AI related topics. My current interests include machine learning, robotics, and common sense reasoning.

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What My Kitchen Reno Taught Me About Information Governance

BY ALYSSA BLACKBURN

Over the last decade, collaboration platforms like Microsoft 365 have rapidly changed how we work and communicate. But with this rapid change has come increasing complexity.

I'm in the middle of a kitchen renovation and have just been through the process of designing what the new workspace will look like (bench space and drawers seem to be the prevailing theme at the moment!). While I'm going through what the essential architecture of the space will be, I also have to consider where all the 'stuff' will go. I love to cook and can admit that the kitchen is a space where I may have too much stuff. I need to design the kitchen so that it's functional, easy to use, and I can find what I need quickly and easily. Simple, right?

It's the same situation with collaboration platforms and information repositories (although potentially with slightly less literal dust). The workspace is equally as important as the content that goes into it, so it's vital that we consider the two things together. Over the last decade, collaboration platforms like Microsoft 365 have rapidly changed how we work and communicate. But with this rapid change has come increasing complexity.

For example, there is a whole lot more 'architecture' to consider when it comes to workspaces (is it a Team, a Group, a SharePoint site, a Yammer Community?), but we can't lose sight of user enablement and information governance considerations. These things must go hand in hand. We need good management and oversight of collaboration workspaces, but also over the content stored within them.

A critical success factor for valuable information management and governance in a collaboration platform is being able to align your information architecture (where your users will work) with your information management program and policies.

This is where AvePoint's suite of information governance tools come together to manage your entire collaboration platform (and beyond!), at both a workspace and content level.

AvePoint Cloud Governance helps control workspaces from provisioning through ongoing management, and recertification (do the right people have access?) through end-of-life—all of which also help to contain sprawl. This right-sized approach to governance means that you can apply different policies and configurations depending on the business purpose, division, or risk.

AvePoint's Cloud Records solution provides information lifecycle management for content stored in your collaboration platform or other business systems (e.g., physical records, file shares, and archival locations like Azure Blob or Azure Files, etc.).

This gives an information manager oversight and management of content from the time is it created with the ability to automatically apply appropriate lifecycle policies for retention, disposal, archival, or transfer.

You can also protect your environment from complex data loss—user error, outages, or a ransomware attack, just to name a few—with AvePoint's Cloud Backup solution. Get back to work faster in the event of a service outage, permissions fiasco, or content corruption, all the while protecting your most valuable asset: your information.

With so many facets to information governance and management, don't make the mistake of ignoring one only to the detriment of the others. AvePoint provides the only single platform that covers the full range of your information governance needs as part of a 100% SaaS environment.

Now, if anyone needs me, I'll be figuring out how to fit 52 (absolutely essential and definitely not expired) spice jars in a drawer.

Visit our website at www.avepoint.com to learn more

ABOUT THE AUTHOR

Alyssa Blackburn Director, Records & Information Management Strategy. Alyssa Blackburn is the Information Strategy Lead at AvePoint, where she helps organisations achieve business value from their information and records. With 20 years of experience in the information management industry, Alyssa has worked with both public and private sector organisations to deliver guidance for information management success in the digital age. She is responsible for the development of AvePoint's information and records management solution, AvePoint Records and Cloud Records, and has been involved with implementing our records management solution with government agencies and commercial clients.


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MEMBER PROFILE

RIMPA GLOBAL

GETTING TO KNOW... Kiara Tonello

RIMPA GLOBAL MEMBER

Who is Kiara Tonello behind the scenes?

I am a 22-year-old currently working and residing within the beauty of Bass Coast. I love animals, camping, walks and my job as a Corporate Information Officer!

Tell us briefly about your career to date

In 2019 I started working for Bass Coast Shire Council as a Customer Service trainee. Once my traineeship was completed, I ended up staying with the Customer Service team as an officer for 3 years. Last year I changed roles and joined the Governance Team as a Corporate Information Officer.

What brought you to the records, information management industry?

The opportunity to grow my knowledge and skill base was my original reason for joining the Information Management Industry, however I soon realised just how many doors this new role unlocked.

There is a lot of variety in the tasks undertaken and no day is the same, so the work is always interesting and there is always something new to tackle and learn. There are also various career pathways within the industry, resulting in the never-ending opportunities to challenge yourself and experience something different.

As one of our first members to complete a Certificate III what were some of the key take aways that you found beneficial for your career development?

The whole course was designed well and every unit was relevant to the work that I do on a daily basis, though the key takeaways that I have found most beneficial would be the emphasis placed on the importance of Information Privacy and Control.

As someone still new to this field, it was great to gain an understanding of the Legislation in which Procedures and Policies are built around and the different ways of which security can be added to information. Another valuable thing I learnt was the process of implementing a project and just how critical the planning stages are.

I look forward to using this education in my role moving forward.

"...There are various career pathways within the industry, resulting in the never-ending opportunities to challenge yourself and experience something different."

As an emerging practitioner in your field tell us about a typical day as a Corporate Information Officer?

A typical day as a corporate information Officer consists of:

- Sorting through the incoming hardcopy mail that gets delivered daily, scanning it into our EDRMS and archiving as required
- Monitoring our inbox and registering correspondence into our EDRMS electronically
- Helping with EDRMS issues and requests that arise as we are system administrators
- Quality checking documents located within archive/day boxes and organising their storage/destruction
- Locating requested archived documents and ordering them from storage providers
- Holding EDRMS inductions for new starters
- Reviewing/updating policies
- Assisting with EDRMS upgrades

Do you have a favourite quote or mantra that gets you through the challenging days?

"A little progress each day, adds up to big results."

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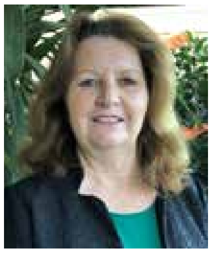

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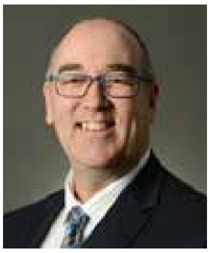

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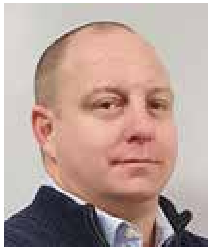
Julie Apps, Life ARIM
Independent Director



Jeremy Manford
Independent Director

RIMPA GLOBAL CENTRAL OFFICE

MEET THE TEAM BEHIND THE SCENES

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Membership Engagement Manager

Amie Brown
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PR and Marketing Coordinator

Sunshine Craig
Executive Assistant and Accounts Officer

Carly Brown
Events Coordinator

Renee Harris
Membership Services Officer

Munaa Said
Principal Trainer and Assessor

Owl Member
(Master of Information Management)
Guardian of Information Officer