

INFORMAA

QUARTERLY



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Contributions in the form of articles, case studies, letters, book reviews, are welcome. Please include brief biographical information e.g. position, place of work, previous experience and qualifications and a black and white photograph. Submissions may be also made in electronic format on a 3 1/2 inch diskette with Wordperfect 5.1 preferred or alternatively as a standard ASCII text file from other word processing software.

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President's Message



Since the May edition of the INFORMAA there have been several developments occur affecting the activities of the Association. Some of the more important points that come to mind are:

- Following the passing and assent to the SA State Records Act, RMAA has been invited to nominate a member to sit on the State Records Council.
- NSW State Records Bill: RMAA were invited to attend the briefing associated with the introduction of the Bill into the NSW Parliament.

Competency Standards

The National Records Competency Standards Steering Committee endorsed the competency standards at its recent meeting in Sydney (11 July 1997). By the time this edition of the IQ is received by the membership, it is my hope that the standards will have also been endorsed by the Australian National Training Authority and have become a "live" document and available for purchase through ANTA. It is my intention to give the membership a full report on how the processes have been to date and where we go from here in the next edition of the IQ. In the meantime, I would like to offer my sincere thanks to all those members who have contributed to the formulation and production of the standards.

Marketing

Have you been seen wearing an RMAA badge? Do you have an RMAA coffee mug? Do you have an RMAA mouse pad? Well, has your Branch got a deal for you!

All Branches have been issued with Association promotional material so please ring your local Branch Secretary and contribute towards the promotion of the RMAA.

Centralised Membership

The Associations centralised membership data base is up and well and truly running and all enquiries should be directed to the RMAA freecall number 1800 24 2611 or alternatively your local Branch Register.

National Convention

Time is drawing near for the 14th National Convention in Perth and I'm sure you don't need to be reminded to register. Once again an excellent and wide ranging speakers program has been prepared which augers well for yet another successful convention.

I realise that this column might sound like an advertising program for the Association, perhaps it's intentional! However, things seem to quieten down around this time of year as Branches go into what could be considered as a "recess" during their Branch Council AGM's and elections. So I guess there is one thing left for me to say and that is I look forward to seeing you all in Perth.

Cheers

**Ray Holswich ARMA
Federal President**

CALL FOR PAPERS

Readers are invited to submit articles for publication. They may be in the form of case studies, conference papers, book reviews, surveys or any report which may be of national interest.

Contributions should be typed & double spaced. Please include a short biography together with a black and white photograph.

Submissions may also be made in electronic format on a 3 1/2 inch diskette with Wordperfect 5.1 preferred or alternatively as a standard ASCII text file from other word processing software.

Send articles to
**Ken Ridley, National Coordinator
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PO Box 8213
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PERTH WA 6849**

**Deadline for the
November 1997 issue:**

25th September 1997

Editorial



The Australian Taxation Office has released draft income tax ruling: TR 97/D4 for electronic records keeping for small business. Whilst aimed at computerised accounting systems, the ruling is comprehensive and clearly has implications for records managers. It does not apply to Internet records or use of smart cards and prescribes for read only storage, retention for 5 years and to be in a format that can be accessible by the ATO. I urge you to visit the ATO web site at www.ato.gov.au and browse the requirements.

In this edition we feature the statement on a common position on electronic recordkeeping. As stated, it will be of great benefit when developing business cases, submissions and explanatory materials relating to this challenging area. As the current letter to the editor points out, it is difficult to capture all records in an organisation and I would argue that the proper design and building of electronic records systems will go a long way to meeting this challenge. On a somewhat sceptical note, however, I and a number of my colleagues eagerly await a practical demonstration and case study of electronic systems compliant with the standards and guidelines.

We also have an article on local government record keeping by Margaret Pember which reminds us that this third tier of government in Australia is not immune from illegal and improper conduct and the absolute necessity for the introduction and maintenance of high standards and best practice in records management – records are not an optional extra.

The small article on the capture of building files onto compact disc at Bankstown City Council by Rod Hastie has become somewhat more significant than expected, due to the disastrous conflagration that engulfed the premises recently. Readers will recall the article in the May 1997 Informaa Quarterly by Stephen Yorke concerning disaster planning. At the time of going to press I am not sure of the exact fate of the council's records but judging on the messages posted to the records management listserv many were lost.

Finally, I look forward to welcoming as many people as possible to the forthcoming convention in Perth.

Ken Ridley ARMA
National Coordinator Informaa Quarterly

NEW FACES



Cheryl Princehorn

Cheryl Princehorn recently appointed by Maroochy Shire Council as Council's first Archives/Research Officer. Formally Employed as Records Manager for Maitland City Council NSW over an eight year period. Cheryl has undertaken a major role to commence an archival program for Council. Cheryl is presently studying records management though South Bank TAFE.

Staff Appointments

CompuTechnics announces the appointment of Conni Christensen as Senior Account Manager in their Sydney Office.

Reporting to the National Sales & Marketing Manager, John Harriott, Ms Christensen's appointment brings to CompuTechnics extensive sales experience in the area of records management and government.

Letters to the Editor

Dear Editor

I am at present one of the many unemployed in WA.

When I was made redundant from my part-time position with a publicly listed company, I admit I was not too concerned.

However, one of my previous employers is again in the news. From 1983 to 1994 I was employed as Records Officer by the City of Wanneroo Council. During my employment with them the Kyle enquiry was conducted. Now a Royal Commission of enquiry is being conducted.

As your members will no doubt be aware, headlines such as "missing records", etc., have appeared in the press, indeed some have used these headlines to gain better recognition for the need to improve records keeping practices.

Lets not get too carried away here, no organisation would carry written evidence of bribe taking, etc., but it has become apparent that you do indeed need more than verbal assurance from management that ALL relevant papers will be sent to records.

I was disappointed when the office of the Auditor General released their report in October, "For the Public Record", that the media release

contained reference to the record keeping by Wanneroo Council when no local authority was included in its performance examination, in fact it concentrated on State Government departments and was quite scathing in its summing up of many of the record keeping practices used by them. Once again they had jumped up on the "news band wagon" and quoted those "missing records". I was able to establish that the records referred to were an audio tape, which had not been recorded, so were not missing as such, more a case of not existing.

You may wonder if I have been required to assist in the enquiry, the answer is no! On speaking with the Committee Clerk employed by council during the period under review, I was surprised to learn that they had not contacted her either.

Is there a moral to this tale of woe? Well, if I have learnt anything it is that with honesty, integrity and the support of other records staff, you still cannot guarantee to capture absolutely everything, if someone does not want the records to be complete, they will find a way.

I enjoy being involved in records management, although not having any formal qualifications prevents me from gaining a position in management.

My experience is also preventing me from gaining experience as a part-time filing clerk. Job hunting has become a soul destroying process I would not wish on anyone.

I warn, this could happen to you, go to management if you feel that things are not correct. If you do not get the support you need, go over their heads, put your concerns in writing. Bring in the RMO if necessary, but at all costs keep faith with your records keeping principles.

Dot Newton
Wanneroo, WA

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Corporate Memory in the Electronic Age

Statement of a Common Position on Electronic Recordkeeping

Introduction

**Sponsored by Australian Council of Archives
May 1996**

In October 1995, representatives of the Commonwealth and State institutions, professional associations (ACS, ACLIS, RMAA, ASA, ACS and AIIM), public sector agencies and private companies, academics, and Standards Australia, met in Sydney to discuss a range of issues relating how to deal with electronic records. Prior to the meeting, discussions had occurred as to how the management of electronic records could occur, the view was emerging that a base set of principles needed to be developed which would allow organisations to assess for themselves how they could develop strategies to meet the challenges of managing electronic record systems.

The meeting spent two days debating a variety of issues, before arriving at the conclusion that to effectively manage electronic systems there was a need to ensure that a set of common principles were developed which would give organisations and individuals a framework within which policies could be developed, standards set and practical strategies devised.

The Common Position Statement provides the basis for managers to assess the issues independent of commercial providers and draw conclusions based upon an assessment of the situation drawn from a document, which can be used to establish standards and set down criteria which need to be met in order to arrive at practical solutions.

The Statement is a bold attempt to establish principles and define the corporate responsibilities required for determining strategies which will effectively deal with the issues.

The Statement can be accessed on the Internet at:

http://www.aa.gov.au/AA_WWW/ProAssn:/AC/Corpmenu.htm

**Phillip Taylor MRMA
Convenor**

This is a statement of an agreed position produced by a meeting of key industry participants, individual practitioners, and organisations, sponsored by the Australian Council of Archives in Sydney on 23 October 1995.

The purpose of this statement is to provide a common basis for Australian organisations - in the private or public sector, for use within the organisation or across a whole jurisdiction - to establish policy, standards and practical strategies for electronic recordkeeping. The organisations that have endorsed this statement believe that such a common position is essential for the development of an effective, coherent and consistent set of solutions to making and managing records in the electronic environment.

As a summary of our common position, the statement provides evidence that initiatives consistent with it conform to widely accepted best practice in this area. It can be used or drawn on when developing submissions, business cases, policies, procedures and explanatory materials relating to electronic recordkeeping.

Executive summary

This statement will help your organisation to establish policy, standards and practical strategies for electronic recordkeeping. It can be used or drawn on when developing submissions, business cases, policies, procedures and explanatory materials relating to electronic recordkeeping.

All organisations need to document their activities: records provide evidence of business activities of all kinds. Accountabilities to shareholders, customers,

regulators, ministers or the public are all documented through records.

While paper still forms the most common medium for records, electronic media are replacing paper as the preferred means of conducting business transactions. Electronic transactions are no different in nature from their paper counterparts: they need to be recorded, captured in a fixed form, maintained and made accessible as records. Electronic records need to provide the same degree of evidence of business activity and the same level of accountability, and be able to function as social resources in the same way as paper records, for the immediate and future needs of organisations, individuals and society. The role and purpose of recordkeeping in the electronic environment - electronic recordkeeping - are the same as in the paper world.

Innovative use of information and information technology is supporting social and organisational change. The process brings many benefits and opportunities to business, government and society. Inevitably it brings risks. Electronic recordkeeping seeks to address the risk that there will not be sufficient evidence of business and social activity conducted in the electronic environment to meet organisational and individual needs. This involves meeting the challenges of recordkeeping in the electronic environment: to find the most effective means to create and capture electronic records, protect and manage them, and make them accessible for as long as they are needed.

This statement is the product of a workshop attended by Australia's leading practitioners in electronic recordkeeping from the public and corporate sectors and representatives of the professional associations in the areas of recordkeeping, information management and computing. The organisations that have endorsed this statement have committed themselves to working towards the vision that:

"By the year 2000 all Australian organisations will follow guidelines and standards for the management of electronic records which are based on common principles, concepts and criteria."

The statement describes principles and strategies for pursuing this vision under the following headings:

- 1 Creating electronic records and capturing them into electronic recordkeeping systems
- 2 Designing, building and using electronic systems that keep records
- 3 Maintaining and managing electronic records over time
- 4 Making electronic records accessible

The strategies can be pursued by programs implemented in organisations, by the work of archives institutions, by research projects and by the efforts of individuals in their lives and work. Using this statement will help your organisation keep its corporate memory in the electronic age.

Corporate memory

Records are so ingrained and implicit in our methods of doing business that we are in danger of overlooking their importance and unique role in the electronic age. The electronic revolution, being experienced by all organisations, offers the opportunity to re-design business processes and methods. It provides a vision of easy access to all information across all the systems in our organisation and available from the wider world. But in seeking comprehensive corporate

knowledge, we must also guard against the possibility of losing our corporate memory, that is, the trail of evidence of action that is provided by records.

All organisations, whether private or public, and individuals in their working and personal lives, need records to document their activities. Records provide evidence of business activities. Without records, people and organisations cannot prove that actions have been taken, commitments entered into or obligations carried out. But records have a broader purpose than the immediate objective of getting business done: organisations exist within regulatory frameworks which impose various degrees of accountability for their activities. Accountabilities to shareholders, ministers or the public are all documented through records.

Business activity in the electronic environment

Increasingly the world is conducting its business electronically. Businesses are seeking competitive advantage by using new technology to reduce costs, enhance products and develop new markets. Governments are seeking to give better value to citizens by using new technology to improve service delivery and the quality of public administration. Consumers increasingly expect products and services of all kinds to be available in electronic form. More and more, individuals expect to be able to conduct their business using electronic tools.

Innovative use of the information base within all organisations is enabling major social and organisational changes which are reflected in opportunities such as:



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The process brings many benefits and opportunities to business, government and society. Inevitably it brings risks. One of the risks is that there will not be sufficient evidence of social and business activity conducted in the electronic environment to meet organisational and individual needs.

Records in organisations and society

Records document social and business activity. They function as evidence of that activity which is captured, maintained and delivered for a whole range of current and future accountability and information purposes - personal, corporate, legal, social, democratic and cultural.

Records are used by government administrators and business people, social watchdogs and regulators, auditors and legal professionals, and individuals in the full range of their roles, such as citizens, family members and researchers.

This complex and diverse, yet essential, set of roles for records and recordkeeping may be summarised as comprising:

- **The business domain:** records are principally kept by any organisation or individual to support their business activities. Decision makers need records to provide precedent for subsequent decisions, to provide details of actions undertaken in case of challenge and to prove that required action was actually carried out. Service providers need records of dealings with customers to support claims for payment and to support further service. Individuals need records to ensure their entitlements and the obligations within and

between organisations and families. Records support the furtherance of all business activities undertaken by organisations or individuals.

- **The accountability domain:** records are an indispensable ingredient in organisational accountability, both internal (such as reporting relationships) and external (to regulators, customers, shareholders and the law). Records show whether the organisation, or individuals in it, have met defined legal, organisational, social or moral obligations in specific cases. In all accountability forums, records are consulted as proof of activity by senior managers, auditors, Royal Commissioners, concerned citizens or by anyone inquiring into a decision, a process or the performance of an organisation or an individual.
- **The cultural domain:** when used for any purpose beyond the support of the business activity which created them, or accountability for that business activity, records may be regarded as becoming part of the resources available to society to account for its collective behaviour. The uses of records as social resource encompasses research into public health, environmental concerns, scientific endeavours or sociological questions. Records are also used as a social resource to support the study of history and historical trends as a part of public education or private research.

Records are created and used by everyone in our society. While paper still forms the most common medium for records, electronic media are replacing paper as the preferred means of conducting business transactions. Electronic transactions are no different in nature from their paper counterparts: they need to be recorded, captured in a fixed form, maintained and made accessible as records. Electronic records need to provide the same degree of evidence of business activity, the same level of accountability and the

same social resources as paper records, for the immediate and future needs of organisations, individuals and society. The role and purposes of recordkeeping in the electronic environment - electronic recordkeeping - are the same as in the paper world.

Opportunities and challenges

For any organisation, good electronic recordkeeping presents many opportunities, including:

- maximising business opportunities
- minimising the risks and liabilities associated with failure to capture and maintain the evidence needed to meet business and accountability requirements, by automating part of the capture and management process
- helping organisations and society move from paper-based to electronic ways of working, bringing environmental benefits, cost savings and improved accessibility, services and accountability.

The challenges that must be faced to achieve good electronic recordkeeping include:

- ensuring that electronic business processes routinely involve the capture of the records necessary to document them
- designing electronic systems that will capture reliable and authentic records
- ensuring that the integrity of electronic records is securely maintained
- ensuring that electronic records created and captured now will remain accessible and useable for as long as they are needed.
- building a culture of recordkeeping among managers and workers.

A Declaration of Interdependence

Information professionals from a range of disciplines will play key roles in the success of the electronic recordkeeping endeavour.

Archivists, records managers and information technology professionals will contribute expertise in such areas as:

- the identification of recordkeeping requirements
- the specification, building, and in some cases, the operation of electronic recordkeeping systems
- the development of recordkeeping standards, and
- the establishment of improved recordkeeping practices.

Collaboration and cooperation with professional colleagues will be required to progress our endeavour. Such colleagues will include:

- lawyers
- auditors
- business analysts
- operational managers, and
- senior managers.

Successful implementation of principles and strategies for electronic recordkeeping will require the informed support of senior management of all organisations. All individuals in organisations will be involved in electronic recordkeeping, responsible for ensuring that evidence of their business activity is created. From there, the recordkeeping professionals will be responsible for ensuring that records are successfully managed for as long as they are required.

Commitment to Electronic Recordkeeping

Organisations endorsing this statement commit themselves to pursuing our shared vision for ensuring evidence through electronic recordkeeping into the 21st century to be achieved through the broad strategic framework outlined in the rest of this statement.

Common Framework for Electronic Recordkeeping

Vision

The organisations that have endorsed this statement have committed themselves to working towards the following vision:

"By the year 2000 all Australian organisations will follow guidelines and standards for the management of electronic records which are based on common principles, concepts and criteria."

Principles and Strategies

The principles and strategies outlined in the remainder of this document form a guide to enable pursuit of our shared recordkeeping vision. The strategies can be pursued by archives institutions, by research projects, through education, by programs implemented within organisations and by the efforts of individuals in their lives and

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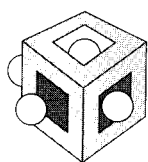
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Objective

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work. They imply the need to involve many other professions and recognise the interdependence of recordkeeping with other information professionals.

Every organisation will have its individual goals in relation to electronic recordkeeping and will choose to pursue these goals using different strategies. In some cases, these strategies will be affected by external factors, such as policies and standards adopted across a whole government. As an industry group, our immediate aims are:

- to progress the work being undertaken around Australia to achieve effective electronic recordkeeping
- to support our shared endeavour in pursuing this vision, and
- to project our professional commitment to the issues and challenges of electronic recordkeeping to others in our organisations and to the wider community.

Regular reporting, the sharing of progress and the continual modification of our strategies in the light of experience will enhance the long term validity of these initial steps.

1 Creating electronic records and capturing them into electronic recordkeeping systems

Principles:

- 1 Each organisation's business processes and systems shall operate to capture records which provide evidence of its business activities conducted electronically.
- 2 Responsibility for creating and capturing records shall rest with individuals nominated as responsible at all levels of the organisational structure and with the organisation as a whole.

Strategies:

- 1 Each organisation should identify relevant and accountable recordkeeping requirements to determine what records are to be created or

captured and how long they should be retained.

- 2 Each organisation should determine, through risk assessment, the degree to which its different activities need to be supported by reliable and authentic records.
- 3 Each organisation should define its own statement of the boundaries of business processes and systems, and the legal and other requirements that affect them, to facilitate the capture of business communications as records when entering or leaving the specified domain.
- 4 Archives institutions should establish documentation strategies focusing on organisational recordkeeping approaches.
- 5 Archives institutions should promote themselves to targeted records creators, demonstrating the benefits of documenting their work through electronic recordkeeping.

2 Designing, building and using electronic systems that keep records

Principles:

- 1 The major objectives of electronic recordkeeping systems shall be to manage the content, context and structure of records as a whole and to ensure that records are reliable and authentic.
- 2 Electronic recordkeeping systems shall facilitate the reuse of information contained within records while securely maintaining reliable and authentic records.
- 3 Each electronic recordkeeping system shall be designed to comply with relevant national and international standards and best practices.
- 4 Electronic recordkeeping systems shall provide one corporate interface to all records relating to a particular business activity, regardless of the media in which the records are created and kept.

Strategies:

- 1 Each organisation should identify recordkeeping requirements to be

satisfied by electronic recordkeeping systems, including operational business needs, legal requirements, industry best practice and the expectations of society.

- 2 Each organisation should determine whether its requirements should be satisfied by one or more than one electronic recordkeeping system.
- 3 Recordkeeping requirements may be satisfied through dedicated electronic recordkeeping systems or by designing and implementing recordkeeping functionality into systems not primarily designed for recordkeeping.
- 4 Electronic recordkeeping systems should operate to comply with Australian Standard AS 4390, Records Management, and other relevant standards.
- 5 Electronic recordkeeping systems should be regularly audited for compliance against the specified recordkeeping requirements.
- 6 When implementing electronic recordkeeping systems, organisations should ensure that such systems are recognised and used as the authorised organisational recordkeeping system's.

3 Maintaining and managing electronic records over time

Principles:

- 1 Electronic records shall be maintained for as long as they are needed.
- 2 Electronic records shall be maintained in electronic form.
- 3 Each organisation shall maintain electronic records to ensure that the evidence is accessible, comprehensible and managed for as long as it is required.

Strategies:

- 1 Each organisation should migrate electronic records of continuing value through successive upgrades of hardware and software in such a way as to retain the full functionality of the preceding systems and the integrity of the electronic records created in them.

- 2 Each organisation should use each such migration as an opportunity to re-appraise the decisions to retain or delete electronic records.
- 3 Appraisal should be undertaken rigorously at the time of designing the recordkeeping system or as early in the life of the records as is possible, to mitigate the need for continual migration of records at migration.
- 4 Each organisation should identify, capture, maintain and migrate the metadata required for electronic records and the systems that create them, including contextual information about the records and the activities that they document, in conjunction with the records themselves.
- 5 The connection between the records and the metadata should be maintained for as long as the records, including through migration of hardware and software systems.
- 6 Each organisation should identify and adopt relevant technological standards that will help ensure that electronic records will be available and useable for as long as they are required.
- 7 Each organisation should determine who will maintain and manage its electronic records of continuing value in an environment that is able to support the content, context and structure of the records over time. This may be the organisation itself, an archives institution or another organisation, that is, the custody of electronic records may be distributed, rather than in centralised archival custody. These decisions may be affected by external policy or other requirements.
- 8 Each organisation should establish standards and procedures to ensure the integrity of its electronic records over time.

- 9 Electronic records management should employ sound data management techniques.
- 10 A variety of information management tools should be explored to facilitate the goals of electronic recordkeeping, including electronic document management and workflow tools.

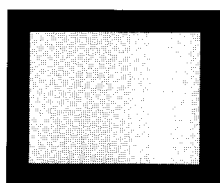
4 Making electronic records accessible

Principle:

- 1 Each organisation shall aim to provide appropriate electronic access to records irrespective of their location, both within and beyond the boundaries of the organisation.
- 2 Each organisation shall protect its electronic records from inappropriate access.
- 3 Each organisation shall be able to provide access to electronic records in ways that will present meaningful evidence of the business activity that they document, in addition to presenting their information content.

Strategies:

- 1 Electronic recordkeeping systems implemented within organisations should facilitate appropriate remote electronic access to records by employees and authorised external users.
- 2 Archivists should work with custodians of electronic records to develop networked access systems that are available and easy to use, while protecting the custodian's operational systems from unauthorised access.
- 3 Governments and other organisations should consider the requirements for and provide access to electronic records in the development of information locator and 'one stop shop' services and systems.



- 4 Archival information systems should serve as hubs for networked access beyond organisational boundaries.
- 5 Archival information systems should provide on-line finding aids, standardised records searching and retrieval tools and compliance with access policies.
- 6 Archives institutions in partnership with other organisations should pursue opportunities to enhance access to electronic records, including value-added services, through entrepreneurial and co-operative ventures.

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May 1996

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First ARMS *Scholarship Awarded*

In February this year, Kirsty Buchan, a student at the University of South Australia, became the first recipient of the Ausdoc Records Management Scholarship.

Kirsty is a full-time student in the Graduate Diploma in Information Studies (Corporate Information and Records Management). This is a new course at the University, 1997 being the first year that it has been offered full-time.

The generous scholarship made available by Ausdoc Information Management pays full fees for one student each year. The recipient is selected on grounds of previous academic merit, as well as potential contribution to the profession. This year's winner, Kirsty, has a sound academic background in Classical Studies and Archaeology, and has also spent some time working in the Australian Archives.

At the award ceremony, Thomas Podeu of Ausdoc said that this scholarship shows the commitment that his company has to training and education for the profession. He indicated that there is a shortage of people who are appropriately trained for the Information Age, and the responsibilities which currently face records managers and corporate information managers.



Sue Myburgh, Thomas Podeu, Kirsty Buchan, Assoc Prof Michael Galvin

The Diploma offered at the University of South Australia is unique in the respect that emphasis is placed on the value of information as a commodity with a dollar value within an organisation, and aspects such as competitive intelligence and environmental scanning are included in the syllabus, as well as elective modules in Archives and Health Informatics.

The Ausdoc ARMS Scholarship is of particular value in today's economic climate, as it is likely that all post-graduate diplomas will be offered only on a full fee-paying basis from 1998. The Scholarship therefore will enable worthy recipients an opportunity that they may not otherwise enjoy.

Kirsty Buchan is particularly thrilled to be the recipient this year as it means that she can concentrate totally on her studies, and will not be forced to spend valuable study time in part-time work.

For further information regarding the Graduate Diploma and the Ausdoc ARMS scholarship, please contact:

Sue Myburgh,
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Building Bankstown Council's Image

Mention Building Files to anyone working in the council environment and you will suffer the lament concerning the difficulty associated with their storage and retrieval. The problem concerns the diversity of document types they contain (from A4 letters up to large plan drawings of buildings), as well as the sheer bulk of many of the files. Building Files exist for every erection on any block of land, be it domestic, commercial or industrial and remain "active" basically forever. And because of the periodic turnover in ownership and constant modifications to premises, there is an on-going need to access the files, primarily to obtain copies of building plans.

Bankstown Council is no different in having to manage these difficult records while still providing an efficient service to their ratepayers. In an on-going reorganisation to raise the level of the overall service provided by the council and introduce best practice, Bankstown Council has created the Bankstown Civic Services Group to act as a self supporting business unit. Civic Approvals is the unit responsible for assessments of Building and Development Applications and the associated management of building files.

In his role of Business Manager of Civic Approvals, Mr Klaus Kerzinger is charged with not only delivering the highest possible service to ratepayers but to do so in the most

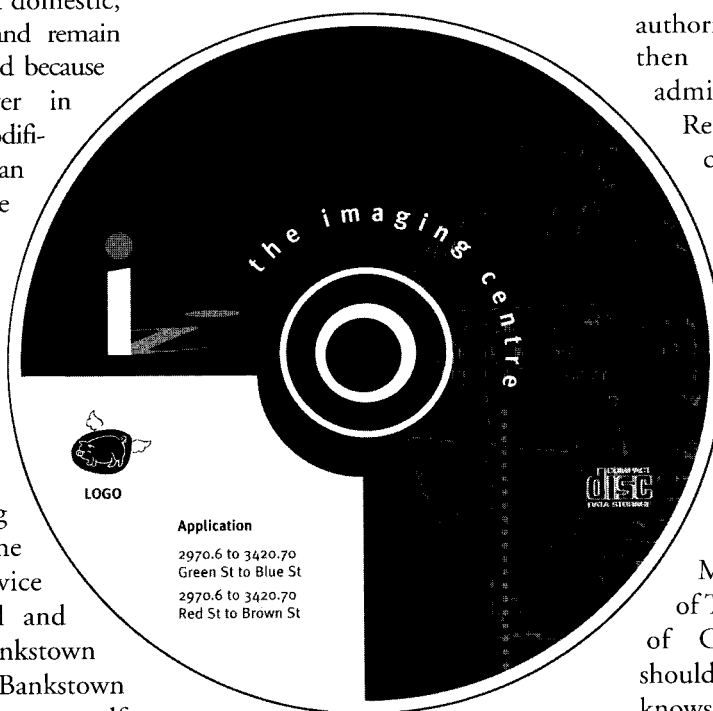
cost-effective manner. It was in pursuit of these goals that the manner of dealing with Building Files was investigated. The solution? To scan the files to CD, which could be easily accessed via existing PC's. "The CD solution clearly meets our primary objectives, and the resulting improvement in the level of service will only be further enhanced as a

recruitment. Satisfying the criteria set for the software was "CD-VUE", which as an added bonus, was free! This software is offered by a leading conversion bureau The Imaging Centre P/L which was simultaneously contracted to perform the conversion of the paper files to CD.

Enquires from the public originate with the completion of a request form by the building owner, or their authorised representative, which is then passed immediately to administration for attention.

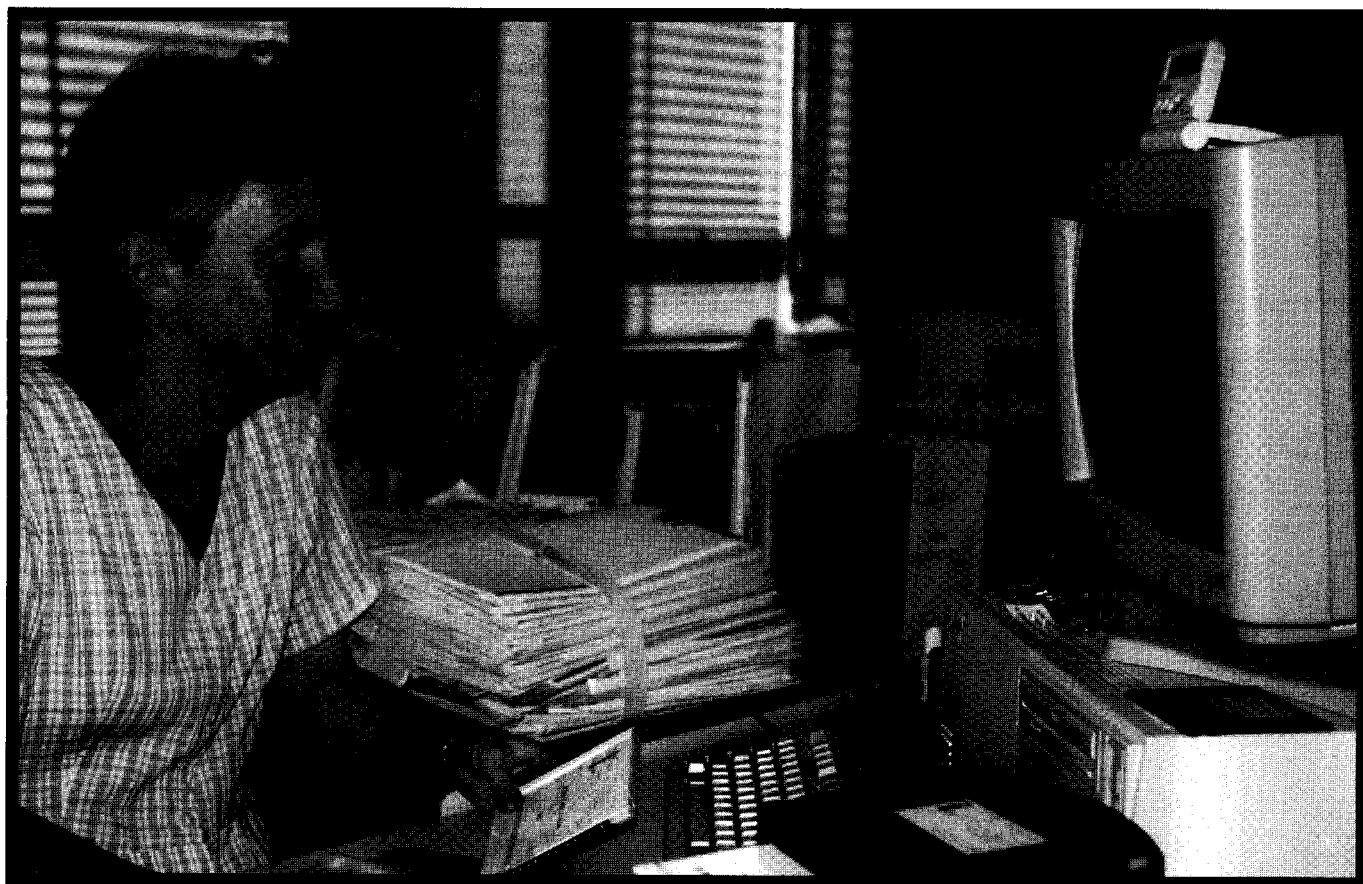
Requests are broken down into chronological groups which indicate the storage medium, and location of the files i.e either prior '81 on microfilm, '82-'83 on CD, and the remainder still in hardcopy. Even these last thirteen years of files are located in separate areas due to storage constraints, which further complicates and slows the retrieval process.

Ms Whitehead, in her position of Team Leader of Administration of Civic Approvals, has long shouldered the retrieval burden and knows better than most the benefits experienced with the new system. "It was not uncommon for us to take days to locate and reproduce a difficult file – not a satisfactory situation for the ratepayer or the Council. That was not using our limited resources productively either" states Kerry. "Now with BA's on CD, files are located, accessed and printed immediately, saving on staff time (and patience!) and the clients cannot believe it" she added.



greater percentage of the records are converted" Klaus reported.

It was also decided that the most efficient manner of implementing this solution was to select appropriate search software and to outsource the image and data capture task. This avoided the necessity for any capital expenditure and additional staff



Merely by replacing their microfilming program with the CD-Rom one, Bankstown Council has significantly upgraded the service supplied and wrought greater efficiencies within the department. Where to from here? Klaus Kerzinger says that the CD solution is the first step towards a greater implementation of imaging. It is conceivable that in time, all such files will be imaged and reside on a central data base which can be made available online to ratepayers, builders etc, thus providing instant access remotely.

Footnote

Tragically, since going to press, the premises of the Bankstown City Council has been completely destroyed by fire. However, while years of paper records have been lost, the action of converting these BA files to CD-ROM (The Imaging Centre retains back-up copy of the CD's) and previous files to microfilm has guaranteed preservation of these vital records

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Accountability in Local Government in Western Australia: The Recordkeeping Nexus

Author

Margaret Pember
ARMA, AALIA, ASA

Master of Applied Science (Information Management); Graduate Diploma of Library and Information Studies; Bachelor of Education, Certificate in Archives Administration, and Advanced Certificate in Quality Management.

Margaret has worked in the records, archives and library environment in the UK and Australia. Most recent positions include a stint at the Western Australian Royal Commission (WA Inc), as Records Manager at the City of Perth, and currently as a Lecturer and Course Co-ordinator in the Records and Archives streams, Department of Information Studies at Curtin University of Technology in Western Australia.

Research interests include information disaster planning and risk management, information quality and total quality management, information as a corporate resource or asset, and professional development and continuing education for records and information professionals. Margaret is currently the Chair of the WA Education Committee.

This paper was presented at the State Conference of The Institute of Municipal Management held in Perth in October 1996. It was intended to give management staff and Councillors a basic overview of the critical nexus between recordkeeping and accountability and the responsibilities and obligations involved at the local government level in Western Australia.

Introduction

In the view of Ian Temby, the former Commissioner of the Independent Commission Against Corruption (ICAC), "There is a clear world-wide trend towards people power, the imperative that those who govern be made to account to those they govern

for how they wield their power"¹. It is highly unlikely that this trend will be reversed. Most political parties these days mouth platitudes about open and accountable government and integrity, especially when they are in opposition, but this seems to change, almost overnight, when they come to power. Then privacy issues come to the fore. The need for secrecy or confidentiality as an essential component of business and political modus operandi is discovered. According to at least one former politician "government is built on the basis of concealment"². As there is no doubt that both the privacy and confidentiality of the individual and legitimate commercial interests must be protected, mechanisms need to be developed to permit a delicate balance between privacy and the public interest and/or good on the one hand and good clean open, honest and accountable politics and government on the other. If one is a sceptic one suspects that accountability only becomes an issue if you are careless enough to get caught! And it does happen: the media is constantly bombarding us with reports about the lack of accountability in the public sector. Public outrage has resulted in a plethora of investigations, Royal Commissions and the like, all of which point to fundamental flaws in the accountability processes in most of the organisations investigated³. The Royal Commission into Commercial Activities of Government and Other Matters (WA Inc.) highlighted a crisis in accountability in Western Australia and an urgent need for the restoration of public confidence and respect for the process of accountable government with improved mechanisms in place

for the prevention of corrupt, illegal and improper conduct. Local government is not immune: we only have to look at the current investigations into Wanneroo to alert us to the issues at stake.

Over 100 years ago the British historian and politician, Baron Acton, stated that "Power tends to corrupt, and absolute power corrupts absolutely"⁴. This certainly appeared the case in the heady days of the 80s when business success seemed so easy and inevitable that questions about accountability, integrity and basic decency were not asked until much, much later. All in the past you say! It cannot happen again! Why not I ask? What has actually happened to ensure accountability now and in the future? Much rhetoric I would suggest, but no real action.

Where do we start?

We need to begin with the basic premise that all individuals, agencies, organisations, corporations, institutions, etcetera are accountable to someone, be it a public servant to his/ her Minister, a Minister to Parliament, a director to shareholders, or an employee to an employer. Quite often these accountabilities are multidimensional, involving organisational/corporate, democratic, legal, social and personal strands that reach up, down and across the organisation and outwards to the external environment⁵. And, it does not matter if one considers the public or the private sector; everyone in the organisation is accountable, from the CEO downwards. This is particularly so in a democracy, where public bodies such as local authorities must be seen to be squeaky clean and above reproach in all their dealings. Like Caesar's wife they must be above suspicion.

What is accountability?

So what is this thing called *accountability*? At the most basic level accountability is the requirement to be answerable or responsible for one's actions. It means being able to provide an explanation or justification for decisions, actions, and transactions that have occurred. In the past, many have held the very narrow and traditional view of accountability, linking it only to matters financial. However, accountability extends far beyond simply providing information or answering questions about costs or payments, although this is still of vital import. It includes inter alia the ability to provide accurate and verifiable information on all manner of activities across the organisation, as well as accepting responsibility (and the associated rewards or sanctions) for the consequences of one's decisions /actions. As such, the concept of accountability is applicable to all individuals and organisations across the public and private arena and at all levels of responsibility in an organisation. Accountability in local government is not limited to the local ratepayers. Local government is also accountable to a host of other stakeholders, ranging from the Parliament and various ministers to the Library Board of Western Australia. Some of these accountabilities will be quite well known and understood, whilst others will be less so.

Who is accountable at the agency/organisational level?

Parliament is central to accountability in the public sector and the Parliament is ultimately accountable to the people. Local government is part of that public sector. Councils may delegate some of their powers under the Act (The Local Government Act 1995⁶) to the CEO and this is the norm to facilitate the effective functioning of Councils (Sections 5.42 and 5.43). However, it is obviously not possible and certainly not desirable for a CEO to do everything personally.

Responsibility and control for various functions are further devolved as appropriate according to level of seniority, functional area or programme, skill/expertise and experience. It is of primary importance to specify exactly who (at the position level) is accountable for fulfilling which responsibilities and to allocate to those accountable, sufficient authority and the necessary resources to enable them to carry out those responsibilities. The establishment of accountability chains in organisations is vitally important. With the changes in most organisations in the past decade, (such as re-engineering, downsizing, outsourcing, the move to a greater customer focus, best practice and benchmarking, etcetera) many employees are less sure about what is expected of them and consequently feel very vulnerable and threatened by this uncertainty and the amount and rate of change. Individuals must know precisely what is expected of them before they can demonstrate compliance with expectations. Most organisations are dealing with this issue by incorporating responsibilities, expectations, requirements, outcomes, and timeframes into job descriptions and/or contracts and strategic plans under the guise of performance indicators which are monitored through the annual progress or performance review auditing and reporting processes of the organisation. To be effective performance indicators should be relevant, appropriate and measurable so that real comparisons can be made between actual results and corporate goals and objectives.

How does an organisation demonstrate accountability?

Accountability is inextricably linked to evidence, like the reverse side of a coin. How can one demonstrate accountability without tangible evidence of that accountability? The easiest and most obvious way to demonstrate this accountability is through effective recordkeeping at the time of the business activity and with continued

BIG APPLE TALK

News from NY and AIIM '97

April in New York - and the Jacob Javits Centre is something else again. Very international. Exhibitors ranged from \$multi-million set-ups to small fax-form software. Visitor estimate was 40,002 - the last 2 being Microsystems - ie yours truly and GM Stephen Wellington.

Q. *How many stands can you cram into the one Trade Show?*

A. For New York it was over 300 - and it's set to be almost that for the **Systems Solutions Show** coming up at Darling Harbour in late August. Microsystems will be there in strength - and at RMAA Convention, Perth.

Film first, then scan

Overseas there's much ado on the cost-efficiencies of scanning from microfilm rather than paper. As Wayne Sandberg, President of AMITECH Corp reports:

'Even if records exist only on paper it is still a good idea to microfilm the paper, then scan the film.'

It seems the USA has (at last!) discovered that microfilm can mean huge savings on input time/cost, as imaging's easier from standardised format microfilm. Big, big gigabyte savings too. Expect to hear lots more on this new/old modus operandi.

The Wizards of OZ

Apart from ideas on all the latest in you-beaut equipment and software, AIIM '97 left us in no doubt that Australia's imaging industry is up with the best, especially in terms of value. We came home with renewed respect for our operators. As a team, the tops.

Next issue look out for big news on some amazing Canon equipment set to take Micrographics into the next millenium. Don't miss it.



Greg Townley

*"See you soon
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accessibility to the information contained in those records (with the appropriate safeguards in place to ensure integrity and prevent unauthorised access) over the requisite time period. Basically, organisations or agencies create, receive and maintain records as part of the normal course of business and as well as being of use for ongoing business purposes (general administrative, fiscal, legal) and for research and historical purposes, these records remain as evidence of business activities or transactions over time and may be used to defend or explain past actions, should the need arise. The WA Inc. Royal Commission demonstrated that misuse and abuse of the public record was commonplace in the 80s and lamented that "The absence of effective recordkeeping has dogged this Commission in its inquiries. Records provide the indispensable chronicle of a government's stewardship. They are the first defence against concealment and deception".

The records should show an audit trail of decisions made: the decision and its outcomes, the how, the why and the when, by whom, and even how much it cost; that is, not only the actual decision made, but also the full context in which it was made. In effect, all the relevant details of every activity, (including the contextual details of the record) should remain as evidence for accountability purposes. Where applicable this will show version control. If an officer of an organisation is not willing to commit details to paper or other suitable record format, it is obvious that the decision/action is open to question and the particular action officer (of whatever level) is not comfortable about being held accountable for the decision made. Of course, delinquencies in recordkeeping are not always deliberate actions to avoid possible future consequences. In many cases the lack of commitment to good recordkeeping is simply a basic lack of knowledge and understanding of

the requirements, rather than a wilful disregard of the law. However, we all know of instances where this does not appear to be the case, for example the infamous Sports Rort Affair, (remember Ros Kelly and the whiteboard?)⁸ and closer to home, the WA Inc and Wanneroo Inc Royal Commissions. Probably the best known example in Western Australia is the removal of post-it notes (and other records) from official files, the so-called *sanitisation of the records* in the Brain Burke era, and I quote from the Royal Commission Report "Over several weeks before Mr Burke's retirement as Premier, four or five members of his personal staff were engaged in removing material from departmental files and destroying it. The task was major involving hundreds of files. It was described by one witness as a "mammoth job". It was done after normal working hours on weekdays and on weekends. Records office staff were not consulted or involved". The report goes on further (S.8.19.35) to "note that all records of Government activities necessarily form part of the official record of the State for accountability and historical purposes. The deliberate destruction of official records cannot be justified and those responsible for authorising it deserve censure".

There is also a purely functional aspect of good recordkeeping that many tend to forget: the record of past actions enables the current occupant of a position to not only account for but also understand the decisions and actions of his/her predecessor. This is of particular importance in our mobile society, where the current average time in a particular management position is two to five years. Duplication of effort and waste of costly resources can also be avoided or minimised when records and results of past actions, activities, and research are readily available in the organisation to those who need them.

Recordkeeping responsibilities

The Library Board of Western Australia through the Public Record Office (LISWA), is currently the primary responsible body for recordkeeping (both current and archival) in the public sector (both state and local government) in Western Australia, under The Library Board Act of 1951 – 1983. The Act outlines basic responsibilities and defines terms such as record, public record and public office.¹⁰ Local government is specifically designated a "public office" under Section 3:

- c) any council of a municipality or other body constituted pursuant to the Local Government Act 1960, or any Act amended or replaced by that Act; or
- d) any other local governing body corporate or incorporate".

Much criticism of the Library Board Act 1951 – 1983 has occurred over the last decade and The Royal Commission into Commercial Activities of Government and Other Matters¹¹, The Commission on Government¹² and the Auditor General¹³ all make extensive recommendations for change, as do the relevant professional bodies¹⁴. For example, the conclusion of the Office of the Auditor General¹⁵ about the legislation is that it needs to be improved or enhanced to include:

- provisions to ensure that public sector records management roles and responsibilities are clearly defined, assigned and appropriately discharged;
- sanctions to discourage the unlawful disposal or destruction of public records and other breaches of the Act;
- provision for the issuing of public records standards and guidelines; and
- clearer definitions of record, public record and public office.

The Auditor General's 1994 report on accountability for public sector recordkeeping in government agencies¹⁶ outlines the primary accountability relationships and records management

responsibilities in the Western Australian state public sector. The local government sector fits into a similar framework under the Library Board Act 1951 – 1983, because of its identification as a public office under the Act. The report (page 54) recommends that "Government should ensure that a comprehensive records management framework is developed, implemented and resourced to assure the effective and efficient management of public sector records". A further report tabled in Parliament in October 1996 was highly critical of public sector recordkeeping. It makes very interesting reading and is freely available from the Office of the Auditor General¹⁷.

Despite the criticisms however, until the current Act is superseded or amended the Library Board remains the primary body charged with responsibility for recordkeeping in the Western Australian public sector.

The officer in charge of a public office has specific responsibility for recordkeeping in the organisation (Library Board Act 1951 – 1983). Section 30 of the Act enumerates these responsibilities. This is reinforced by the Local Government Act 1995, s.5.41 (h), which states that one of the specific functions of the CEO is to "ensure that records and documents of the local government are properly kept for the purposes of this Act and any other written law". Other sections also indicate recordkeeping requirements, such as the keeping of minutes, the keeping of proper accounts and rate records, etc. These two Acts are the general Acts relating to records and accountability in the local government sphere. A number of other statutes, regulations and by-laws will have far more specific accountability requirements: Occupational health and safety, equal opportunity, taxation, personnel, zoning, building codes, health regulations, to name but a few, all of which need to be understood and complied with. Freedom of Information

legislation has had an enormous impact since its introduction in 1992 and has been a great motivator for some organisations to get their records housekeeping in order. The Criminal Code and the Evidence Act also need to be considered.

As already mentioned, the Public Records Office (PRO), through LISWA and the Library Board of WA, is the primary body for records management responsibility in the WA public sector. The sphere of activity of the PRO includes providing general assistance and advice about current principles and practice, and the development of policies and standards encompassing the whole spectrum of recordkeeping from the creation and maintenance of records to retention and disposal scheduling and permanent archiving. One of the latest publications of the PRO is Public records management: A guide to normal administrative practice, colloquially known as NAP, which states that "... all government officers are responsible for the proper recording and maintenance of public records under their control. Government officers are required to ensure, to the best of their ability, the accurate and proper documentation of each business transaction or event"¹⁸. Under the Act (which is currently under review) public bodies also have certain responsibilities in regard to the disposal of public records. Theoretically all records created or received by public/government officers (both state and local) are public records and disposal may not occur without recourse to the Library Board Act. Appropriate disposal (whether it be ultimate destruction or permanent archiving) is expedited legally and effectively through the mechanism of a Retention and Disposal Schedule approved by the Standing Committee on Public Records (of the Library Board of Western Australia). Disposal effected through this mechanism stands up to scrutiny in the courts as the said disposal can be demonstrated to have occurred as part of the normal

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course of business practice in the organisation. This is often very important in the legal discovery process or when answering questions from the Information Commissioner. If a document is extant it must be produced. Although routine and legal or compliant disposal (backed by the relevant approved schedule) as part of the normal course of business practice is acceptable in a court of law, one needs to remember that it is an offence to destroy documents, even if they may be due for destruction under the terms of an approved Retention and Disposal Schedule, if the said documents are a part of any investigation. Far better to routinely destroy documents when their sentence expires rather than have them come back to haunt you at some later date!

The compliant organisation

Different types of records will obviously need to be kept for varying lengths of time. Some may be disposed of almost immediately, others, perhaps 10%, will be of enduring value to the organisation or the state and need to be kept forever. Factors which impact on the timeframe or sentence allocated to records include general administrative and fiscal operating requirements, legislative/regulatory requirements and the purely historical. Over 500 statutes/regulations in Australia make mention of the recordkeeping responsibilities of organisations in one way or another. Most do not apply to local government, however, as previously mentioned, there are a significant number that do and organisations need to make themselves aware of these. A compliant organisation will identify all those particular statutes or regulations that are applicable to them and develop mechanisms to ensure that they can demonstrate compliance. Failure to comply can be costly in dollar terms and very embarrassing. The old chestnut "it will never happen" simply does not ring true anymore! In these times of increasing litigation compliance should be a basic component

of the risk management strategy of the organisation. Risk management has moved beyond the financial arena. Ignorance is no longer bliss! Can you afford not to protect your organisation? A formal compliance programme will ensure that all necessary recordkeeping responsibilities are identified and managed appropriately as an integral part of the "due diligence" process.

The recordkeeping/accountability nexus

Thus records in whatever format or medium, received, created or actioned by the organisation in the course of its business, provide evidence of those activities, policies, decisions, and outcomes. It is this evidential role of records that is important for the purposes of accountability. Records should provide an audit trail of actions, decisions and outcomes and must be managed effectively and ethically to ensure this outcome.

Every organisation is unique and thus organisations will differ in the way they manage their records. Some will have very centralised management with a records registry, some will have totally decentralised management with smaller concentrations of records nearer to the users, whilst others will have a combination of the two. Still others will have no management at all! In this scenario management is abdicated to the end-users, which may be all very well until the particular person/s leaves the organisation. One organisation I was in recently has had three administrators in the last two years. Each time the incumbent changed the computer hard disk was wiped and the new person started from scratch! Situations like these are not uncommon and leave the organisation very vulnerable. A catastrophe waiting to happen!

The format of the record

For many the record is still just paper placed on a file. This certainly is no longer the whole story. Computers have become an integral part of life.

The sheer mass of information flooding the workplace means we cannot live without them. Computers have become a vital tool in the management of this information and of course enable us to create far more information and at a faster rate than ever before! And, at a later date, any single item of this information must be located quickly if required. The greater the mass of information, the more important good management of the record becomes, otherwise finding the required information becomes like the proverbial needle in the haystack.

And what about the paperless office? Despite the hype, for most it does not appear much closer than it was a decade ago. Statistics indicate that about 90% of records are still in paper format.¹⁹ A worrying statistic is that more paper is being consumed than ever before. What is more, 60% of the information created on computer is printed out for data entry, that is rekeying, into another system!²⁰ A basic problem here! So, we have far more information being generated and far more paper being used! A term heard recently on television to describe the paper avalanche generated by computers was *computer puke-out!* How appropriate! Another obvious problem is the time-lag in technology take-up. Imaging has been around a long time now but how many of us are actually using it effectively. We have certainly all been considering it for a number of years. We also need to have the issues about the admissibility of imaged documents clearly enunciated and widely understood.

What can you do?

Accountability at the organisational level can be facilitated through good recordkeeping and is an expected outcome of good recordkeeping, but, what is good recordkeeping? The profession in Australia, indeed around the world has been addressing this issue for a number of years. In February 1996 the Australian Standard AS4390

Records Management was issued. This standard is currently being considered by the International Organisation for Standardisation for adoption as an ISO Standard. The Standard sets out very clearly the requirements for good recordkeeping and can be used as a benchmarking tool. Most of the standard is just good plain commonsense.

The preface to the Standard points out that;

Inadequate records and recordkeeping can contribute to, or even be instrumental in accountability failure through –

- a) failure of employees or systems to make records in the first place;
- b) making records that are inadequate to meet accountability and other organisational requirements, (ie. records that are not full and accurate);
- c) failure to capture records into recordkeeping systems, so that they are subject to arbitrary destruction or cannot be found when required;

- d) failure to identify and retrieve the authoritative version of a record where multiple versions exist;
- e) failure to maintain records during the time necessary to meet specific accountability requirements; and
- f) failure to assign responsibility for different aspects of recordkeeping at appropriate levels of the organisation, so that no-one takes responsibility.

One of the recommendations of the standard is that someone in the organisation should have prime responsibility for the records management programme/function. Furthermore, records should be a recognised programme within the organisation, with due recognition given to the role of records and information management in the achievement of the core business (and strategic aims) of the organisation.

The Role of the Records Manager

Ultimate responsibility resides with the CEO. In practice this is usually devolved, hopefully to an experienced, skilled and pro-active records manager/senior records and information officer.

The role of the record manager revolves around the inextricably linked issues of service provision, risk management and the closely allied concept of accountability.


Service: The most obvious day-to-day role of the records manager is the provision of a quality/ best practice records and information management service to the organisation to facilitate the business processes, decision-making, strategic objectives, etc. of the organisation. High quality records/information and recordkeeping services are critical to an organisation's ability to function effectively and gain a competitive edge. Service quality includes aspects of timeliness, currency, accuracy, relevance, completeness, etc.

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Monitor and manage workflow.***

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Risk management: The identification, minimisation and management of the information risk of the organisation is also a crucial role of the records/information manager. This includes the identification and appropriate protection of those records critical for the continuance of the organisation should a disaster occur, and the establishment of a routine and compliant retention and disposal regime for records according to legislative/regulatory requirements and the needs of the organisation. *Accountability* can be considered a basic component of the risk management function. Records are created, received and maintained as part of the normal course of business and as well as being of use for ongoing general administrative, fiscal, legal, and cultural purposes, these records remain as evidence of business activities or transactions over time and may be used to defend or explain past actions when required. Lack of such evidence for accountability purposes leaves the organisation extremely vulnerable and the cost to the organisation could be immense.

The 90s and beyond

Well, it is a very brave or perhaps foolish person who predicts the future in this time of rapid technological change! No doubt technologies will evolve that we cannot even envisage today. However one thing we can be sure of is that accountability in the public sector will remain on the public agenda and thus true recordkeeping mechanisms must be incorporated into electronic systems of whatever kind to ensure accountability. Whole-of-organisation frameworks need to be developed. My vision is one of a single user interface, a completely electronic desktop with "hot links" to all the necessary record and information databases, both internal and external to the organisation. And probably this will eventuate, but not tomorrow. The move from the paper to the electronic environment has been much slower than many expected. Developments are many and varied, and most organisations now have

some form of electronic system. Despite the increase in capacity and the decrease in costs many organisations have been reluctant to move to imaging technology. Apart from the cost, a major factor has been uncertainty about the admissibility of imaged documents as evidence. Until the issue is clarified, (as has been the case in other jurisdictions such as South Australia²²), doubt will remain about the advisability of doing so. The Public Records Office at this point in time advises that original source documents that are imaged be retained for evidential/accountability purposes²³.

Electronic systems are like sirens beckoning and promising all – vendor hype is most enticing! There is no doubt that electronic systems offer many opportunities such as improved accessibility and workflow to enhance the business process. The major challenge will be how to manage effectively to ensure that records will be available when needed for current and ongoing administrative requirements, and how to capture evidential records to ensure that all accountability and compliance requirements are met. Much has been written on the issue of late.²⁴ Too often in the electronic environment it is a case of *here today and gone tomorrow!* How will you access today's data in ten years time? Technical obsolescence is a fact of life so continued accessibility of the record means the establishment (and don't forget the funding!) of a migration program for the data and the metadata through successive upgrades of hardware and software. Security and integrity are other vital issues that must be addressed. I see a real need for the development of a genuine symbiotic relationship between records managers and information systems managers. Each has a wealth of skill and knowledge that when combined can be of real value to the organisation. For example the records manager may identify the recordkeeping requirements of a system, whereas the information systems manager may be more closely

involved in actually determining how these requirements are achieved and implemented. Above all, success will be dependent upon adequate resourcing and the support and commitment of senior management.

Conclusion

The evidential nature of recordkeeping has always been important, but the problems and mismanagement of the 80s (with associated corporate and government corruption) and the subsequent enquiries and royal commissions, have highlighted the importance of recordkeeping for accountability purposes.

Despite the alleged move to *open and accountable* government, little has really changed. We need to ask – do the majority of politicians and senior public servants really want to be accountable? Rhetoric is fine, platitudes are cheap. But, the fact remains that real action in this area is lagging behind public expectations of accountability. Despite the recommendations of numerous enquiries, audits and royal commissions, recordkeeping is still largely seen as an unimportant, unskilled task to be carried out by the least skilled officers in the organisation, rather than as a function that is crucial to the achievement of the strategic aims of the organisation and the development of a competitive business edge. Organisations are only as good as the decisions they make and decisions should be based on high quality records and information. Thus "good records management and the records this produces are critical to an organisation's ability to function effectively ... records are not an optional extra – they are integral to the business of government and to accountability of all types and all levels"²⁵.

Recordkeeping is indeed an instrument of public sector accountability.

Foot Notes

¹ Temby, I. QC (1994). Making government accountable: The New South Wales experience. In Brogan, M. & Phillips, H. Past as prologue: Proceedings from a conference on the Royal Commission into Commercial Activities of Government and Other Matters: Perth: SASTEC, Edith Cowan University, p.4.

² David Parker in evidence given to the Royal Commission into Commercial Activities of Government and Other Matters, and quoted widely in the press, eg. the Editorial in *The West Australian*, 21 September 1996, 'Parker's fall from grace complete', p.12.

³ See for example The Royal Commission. (1992). Report of the Royal Commission into the Commercial Activities of Government and Other Matters. Perth, WA: The Commission. Parts 1 & 2.

⁴ Acton, John Emerich, 1st Baron. 19th century historian and politician in *Historical essays and studies*.

⁵ Corbett, D. (1992). *Australian public sector management*. Allen & Unwin: Melbourne, p.191.

⁶ Parliament of Western Australia. Local Government Act 1995.

⁷ The Royal Commission, op. cit., Part 1, Vol. 6, S.27.2.7.

⁸ Oakes, L. (1994). 'Too late to turn back now'. *The Bulletin*, February 23, p.14. Political embarrassment over the allocation of \$30 million worth of grants on a whiteboard with no permanent record of decision-making process kept. "The only charge against her that has been made to stick is that of sloppy administration. No fraud has been found, no impropriety, and political bias in the awarding of grants has not been proved."

⁹ The Royal Commission., op.cit., Part 1, Vol. 2 S. 8.19.34; 8.19.35: pp. 8-69 and 8-70.

¹⁰ Parliament of Western Australia. The Library Board of Western Australia Act 1951-1983.

¹¹ The Royal Commission, op.cit., Parts 1 & 2.

¹² Commission on Government. (1995). Report No. 2, part 2. Chapter 7: Independent archives authority, pp. 34-157. Perth, WA: The Commission.

¹³ Office of the Auditor General. (1994). Performance examinations: Part 2C - Accountability for public records management. Perth, WA: OAG. ppA1 -64.

¹⁴ For example the Records Management Association of Australia (WA Branch) in various submissions and reports, eg. the 1994 position paper: An independent State Records Office in Western Australia. Perth, WA: RMAA.

¹⁵ Office of the Auditor General, op.cit., p.55.

¹⁶ Office of the Auditor General, op.cit., p.54.

¹⁷ Office of the Auditor General. (1996). For the public record: Managing the public sector's records. Performance Examination, Report No. 6. Perth, WA: OAG.

¹⁸ Public Records Office of Western Australia. (1995). Public records management: A guide to normal administrative practice. Perth: LISWA, p.10. A copy is circulated free of charge to all state and local government agencies - additional copies may be purchased from the PRO.

¹⁹ Coopers & Lybrand, 1987 study cited in Kouloupoulos, TM. & Frappaolo, C. (1995). *Electronic document management systems: A portable consultant*. New York: McGraw-Hill. p.14 and Delphi study, 1992, p.15.

²⁰ Kouloupoulos, TM. & Frappaolo, C. (1995). *Electronic document management systems: A portable consultant*. New York: McGraw-Hill, p.16

²¹ Standards Australia. (1996). AS 4390 Records management: Part J: General. Homebush: SA. Preface, p.3.

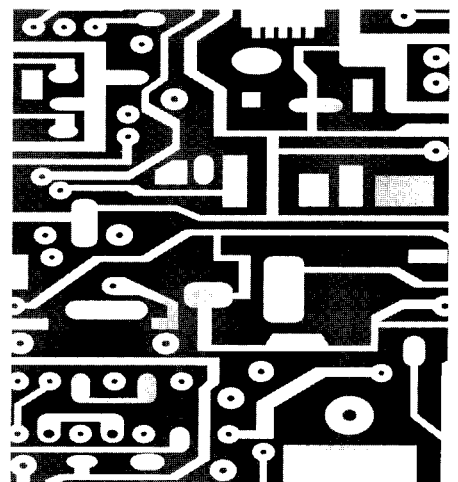
²² The SA Evidence Act 1990 permits the production of scanned documents as evidence provided they are certified as an "accurate reproduction of the original contents" and are accompanied by a supporting set of "image system compliance criteria" against which the system, agency can be certified.

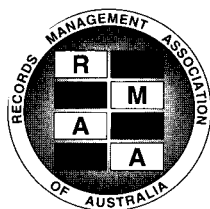
²³ Public Records Office of Western Australia, op.cit., p. 24.

²⁴ See Bearman, D. (1994). *Electronic evidence: Strategies for managing records in contemporary organisations*. Pittsburgh: Archives & Museum Informatics; and Australian Council of Archives. (1996). *Corporate memory in the electronic age: Statement of a common position on electronic record-keeping*. Boxhill, Vic: ACA.

²⁵ Douglas, J. (1992). On the public record: Accountability and records management in the light of the Royal Commission into the Activities of Government and Other Matters. In *Proceedings of the RMAA Conference*, Hobart, 1992, p.1 (on disk).

Margaret PEMBER
ARMA, AALIA, ASA





Preserving Yesterday Managing Today Challenging Tomorrow

The Organisation Process

Our Convention Planning commenced in January 1995 at a casual luncheon where a group of four Branch Councillors discussed the probability of running a successful National Convention in Perth, some 2.5 years down the track.

A Plan was established and taken to Branch Council for approval in March 1995. Authorisation was granted and we commenced the selection process for a Convention Manager.

Expressions of interest were prepared with the assistance of the Western Australian Tourism Commission and Congress West.

Approval was granted by the Federal Council in September 1995, Congress West was contracted and we were on the way!

One of the most difficult decisions in the whole convention management process was the selection of a theme. After many Chardonnays and Chenins a very relevant, distinctive theme was developed.

Another difficulty the committee faced early in proceedings was to select the convention venue. Yes, we did select a hotel located on the beach— in fact the best beach in Australia with the best sunset! It was hard to go past the Radisson due to their superb convention facilities. We moved away from the city, casinos and big cement blocks! We have tried something different and we know it will be a great success.

The Programme Committee has been fantastic. The range of speakers they have selected with the differing sessions, breakfasts and other events will give delegates a great range of options.

We were now ready to move into the Marketing Phase with a Video, a comprehensive Registration Brochure which included a complete Programme and list of confirmed speakers.

This was later followed up with a second circular of the brochure with additional speakers detailed.

As D-day approaches, our committee will move into radios, newspapers, magazines, personalised visits and hopefully some T.V. exposure.

The other duties not listed previously include:

- Design of Letterheads, Logos, Brochures and Videos.
- Writing by the Committee of dozens of articles, letters and appendices.
- Taste testing the many menus.
- Viewing bands and visiting convention venues at all hours of the day!

As the Convention Chairperson, I have often been asked to explain what is the most important aspect of organising a successful National Convention? It is a tough call, but I suggest the composition of the Committee to be the most important aspect. Size and professional backgrounds are not as vital as having a group of people willing to work in a team environment that is both

committed and prepared to give a great part of their time over a three year period for the benefit of their colleagues.

A question often leading from this is, is there life after the Convention? I would certainly like to think so!!

In all it has been fun, sometimes protracted, but it will be worthwhile when in September, we again come to meet our colleagues throughout Australia and beyond, with whom we will enjoy having a lighthearted joke, light ale or will it be a Chardonnay or Chenin?

See you all in Perth.

Neil Granland ARMA
Convention Chairman

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RMAA 14th National Convention Perth, Western Australia 15-17 September 1997

Trade and Sponsorship

Industry has become an integral part of our profession over the past two decades through consideration, application and participation.

During this time both records professionals and industry have realised the enormous benefits associated with strong relationship.

1990 was the first time any of our National Conferences received sponsorship by industry. This growing sponsorship has ensured that our National Conventions have become professionally recognised and successful.

The Industry Exhibition has become an integral part of RMAA National Conventions. This year's National Convention, to be held in Perth in September 1997, will display more

examples of our Profession's progression in Manufacturing Products, Service and Technology.

The 14th National Convention Committee and our convention management organisation, Congress West, thank the Industry for their continued support. Thirty two of the forty Industry Exhibition Stands have been booked.

Sponsorship, however, has been a little slow and there are some very worth while opportunities available. We thank Recall for their continued commitment to our National Convention. Their support makes the tough financial decisions easier and ensures we can give our delegates that little extra. Lunches, morning and afternoon teas will be served in the exhibition area

and we will encourage delegates to visit the exhibition.

Our Convention will provide members with the best opportunity this year to upgrade their professional skills and knowledge.

Don't miss out. See you in Perth for the big one in September and remember to bring the speedos!!

**Neil Granland ARMA
Convention Chairman**

Note:

At the time of going to press trade booths and sponsorship opportunities were still available.

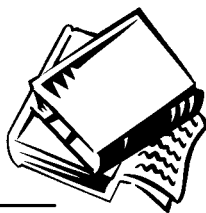
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Book Review

**Records Management:
A Practical Approach.**
3rd ed. 1995.

Susan Diamond

Amacon. New York.

ISBN 0-8144-0295-X

Prentice Hall Australia

Recommended Retail Price \$59.95

That this popular North American text book is now in its third edition attests in great part to the worth of the book. Practicing Australian records managers and students of records management will find it contains much of value. Examples of forms and memoranda in the book, which can be used to support a records management program, reflect the depth of knowledge and practical experience of the author who is a records management consultant with 20 years experience in the field.

In addition to the title, author and edition, the dust jacket carries the words "policies", "practices", "resources" and "technologies". Readers will find much to support them in the development of policies which now play such an important role in underpinning records management programs in today's devolved organisations. The breadth of coverage of technologies is somewhat weak in that although imaging, CD-ROM and microfilming are covered, there is little in the way of coverage of the management of records in Email and electronic document management systems. Discussion of

the attributes and applications of computer assisted records management packages is also poor.

Like most North American text books on records management, the book is particularly strong in the areas of records inventories, retention scheduling, vital records and records centres (centres for the storage of inactive records). Forms and reports management are also addressed well by the author. They are frequently neglected aspects in Australian records management programs. Hopefully, Australian records managers, after reading these chapters, will be encouraged to extend their records management programs to cover their management.

Three chapters which I am particularly pleased to see included are the chapters on staffing the program, using project management tools for planning and control and documenting the program. The practical experience of the author again comes through in her strategies for checking the filing of new staff and her preference for leaving "out" cards where files are removed from filing shelves, even though they may be issued out with a barcode, in order to expedite re-filing. The project of developing a retention and disposal schedule is used to demonstrate project management techniques, including showing samples of a project diagram that highlights the critical path and a milestone chart outlining tasks, targeted dates and

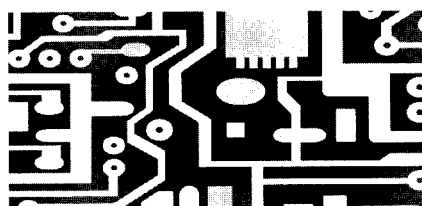
persons responsible. The importance of documentation is emphasised in the chapter dedicated to this topic and includes policy statements, distribution procedures and playscript procedure writing.

The index and glossary are helpful but weak from an Australian perspective in that terms such as "resubmit" or "bring-up", file tracking, public records and folios, classifications are not to be found. This edition purports to be a completely updated edition. It includes fourteen chapters as well as a resource appendix, glossary, bibliography and topics index.

Throughout my record management career I have drawn upon previous editions of Diamond's text and I am pleased to see this new edition. However, I am mildly disappointed in its coverage of the new technologies and issues confronting the records manager of today; the latter which she touches upon in the last chapter which comprises just 5 pages.

Priced around \$Aust 59.95 this is a book worthy of placement on the resource shelves of records managers.

Marita D Keenan MRMA



Send Your Book Reviews to: Informaa Quarterly
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Perth 6849 WA

CompuTechnics Successful in OGIT Records Management Bid

Leading Australian information organisation, CompuTechnics, has been successful in winning a place as one of the Federal Office of Government Information Technology's (OGIT) preferred electronic document management and records management suppliers in partnership with systems integrator Ferntree Computer Corporation.

According to John Harriott, CompuTechnics, the announcement reinforces the company's position as a leader in the information management marketplace.

"Our flagship product, Objective, is the result of many years of Australian based research and development. We believe Objective sets the world standard in functionality, design, ease of use and flexibility for information management.

"It is very rewarding for an Australian organisation such as CompuTechnics to be recognised as a preferred vendor of best of breed software to the Australian government," said Mr Harriott.

The CompuTechnics and Ferntree partnership is one of five entities selected by OGIT. The OGIT panel consisted of professional evaluators and representatives from intending government agencies. Each of the OGIT submissions were evaluated on references, product, research and development commitment and level of Australian content.

Founded in 1987, CompuTechnics is a leading software development and systems integration company specialising



in document management, records management, workflow and imaging solutions. CompuTechnics is based in Sydney, Australia, with offices in Melbourne and Canberra.

Objective Enterprise

CompuTechnics' flagship product is Objective. Built from the ground up in Australia, Objective provides one solution to the three challenges of information management; electronic document management, physical records management and workflow.

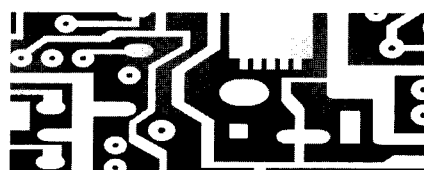
Objective securely stores and manages information within a user friendly information management system. Using Objective, users can organise, route, track and share all corporate information quickly and efficiently.

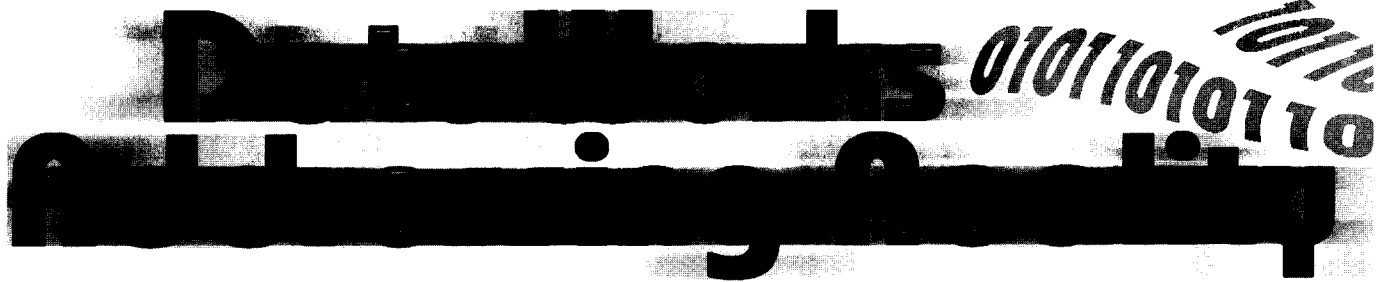
Objective customers include Transfield, BHP Information Technology, Royal Australian Navy, Department of Environment, Public Transport Corporation of Victoria, Aboriginal and Torres Strait Islanders Commission, Honeywell, P&O Ports, CSL, Clyde Engineering and the Environmental Protection Agency.

With over 20 % of its staff focused on R&D and product improvement, CompuTechnics continuously improves and maintains its position as a provider of world class information management solutions.

Enquiries

John Harriott
CompuTechnics Pty Ltd
Ph: (02) 9955 2288





DataWorks the Complete Information Management package developed by Brisbane based company Advanced Data Integration Pty Ltd (ADI) is the means of addressing the reality of Information Processing today according to National Marketing Manager, Mr Geoff Redman.

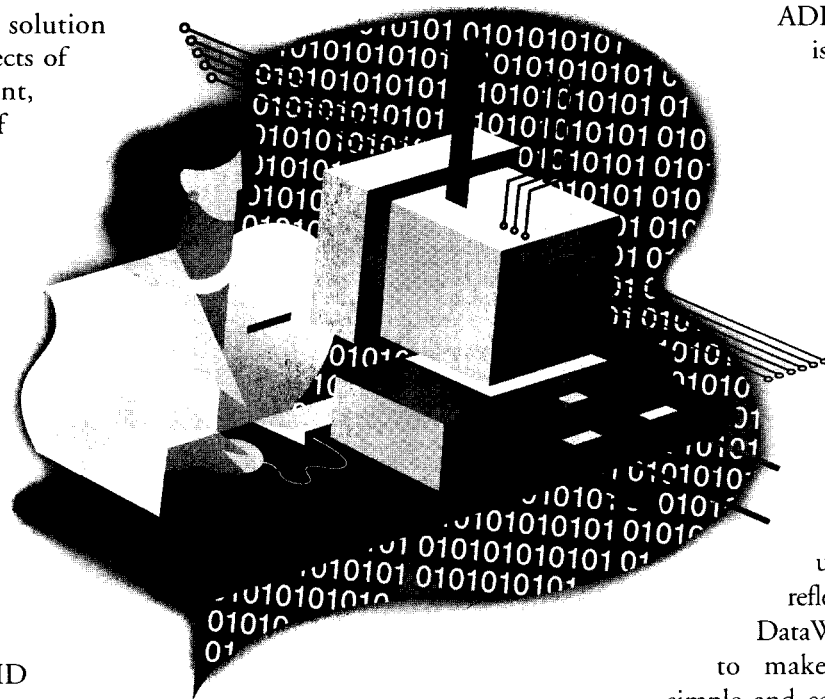
Mr Redman advises "ADI has created a totally integrated solution encompassing most aspects of document management, including the issues of traditional document management, with management of hard copy documents, capture of electronic documents, facsimile and Email gateways, workflow, document imaging and the storage of data/information to a variety of media including CD-ROM, Optical disks, Tape, RAID disks, etc."

Advanced Data Integration has enjoyed rapid growth since it was established in May 1994 by Chris Gorry, Mark Jeacocke and Nick Inglis and has grown from an initial staff of four to a current staff of eighteen with offices now located in Brisbane, Melbourne and Emerald in central Queensland.

The physical growth in the company has been reflected by a corresponding

growth in DataWorks functionality. DataWorks, a Windows-based development from its inception (3.1.1., 95 and NT Win) operates on a variety of hardware and software platforms including NT. Clients have the option of selecting a low end system based on

well as a solid base of Local and State Government bodies have installed DataWorks. The major attraction has been the functionality of the product and the commitment of Advanced Data Integration to providing a high level of professional support and guidance during the implementation process.



ADI's DataWorks software is able to be tailored to meet specific client requirements. The DataWorks database includes all of the core data elements expected in a product that covers records management and workflow. The user site is able to build an index structure and screens on top of the underlying structure that reflect the site requirements.

DataWorks provides a Wizard to make this complex task simple and easy to complete. As a result the site is able to add additional index 'tabs' and screens as required.

The ability to tailor the application without impacting on the ability to upgrade to the next version means all departments within an organisation can take advantage of a single product.

ADI's DataWorks is able to handle different data formats. For example, it is possible to store 'host' based data, such as financial reports, payroll, word

Microsoft Access, or the ability to obtain higher processing power through the selection of either Microsoft SQL Server or Oracle. Current installations have clients using DataWorks from multiple sites with replicated databases and hundreds of users.

Over the past two years some of Australia's largest organisations as

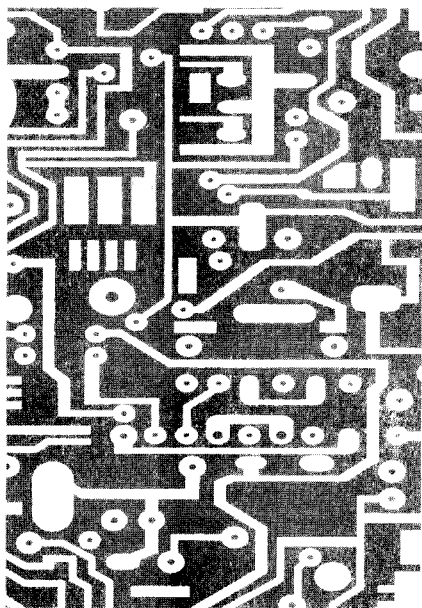
processing, etc. This information may be downloaded from the 'host' computer and stored to optical disk or CD-ROM using user defined criteria.

DataWorks has been integrated with a number of geographical information systems allowing the user to have seamless integration between the document management system and a GIS system. This provides a graphical representation of a physical location. The integration facility unlocks enormous power enabling the end user to identify properties, equipment, etc, graphically and to have the relevant documents displayed. Alternatively, the user is able to move from an examination of a customer enquiry and highlight the relevant property, physical location or equipment, within the GIS system.

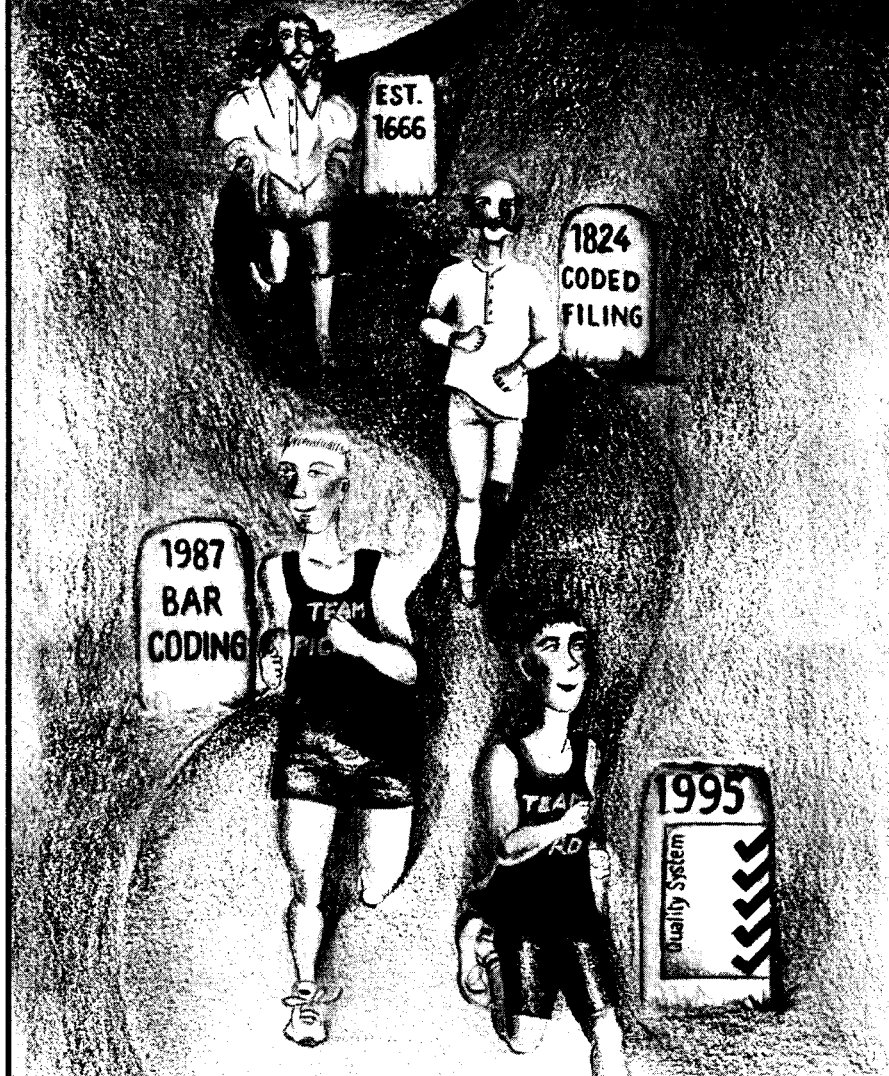
With over forty clients and a rapid growth rate, Advanced Data Integration is assured of continued success and is moving towards the establishment of an office in Sydney.

Enquiries:

Geoff Redman
National Marketing Manager
Phone: 07 3839 1400
Fax: 07 3839 1449
Email: adi@advdata.com.au



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Recall takes Active File Management to new heights

Recall's Active File Service (formerly called Open File), has been significantly upgraded to facilitate high-volume retrievals for high-activity files. Recall has developed a purpose-designed, custom-built, active file storage module, which provides a unique storage infrastructure in its main records centres, (see photo of structure).

This module has been constructed for extremely rapid lodgement, substitution and retrieval of active files and the prototype in Recall's Sydney Records Centre at Alexandria is believed to be the first of its type to be built anywhere in the world. The Sydney Records Centre is 0.6 kilometres long and is the largest single records repository in the Southern hemisphere.

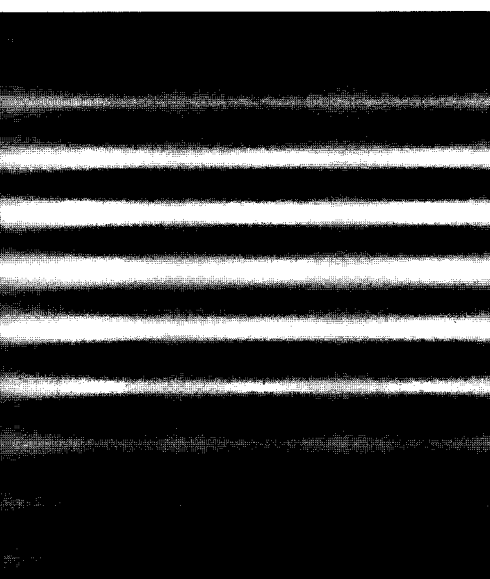
This active file structure has three levels of storage and features security, environmental controls and fire protection services which are integral to the module and separate to Records Centre's main protection services. No effort has been spared to ensure the long-term protection of customers' active files.



As an additional feature, discrete sections of the module can be securely isolated, (based on "linear shelf metres"), for customers who have particularly high-level security storage and retrieval requirements. This facility for multiple independent secure locations has been particularly useful for some types of government files and companies with sensitive proprietary information.

Each file is individually barcoded and scanned into a shelf location using, advanced "array-based" location mapping and newly developed, leading-edge, file tracking and identification systems.





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- U need Accountability
- U need Information Management
- U need Support

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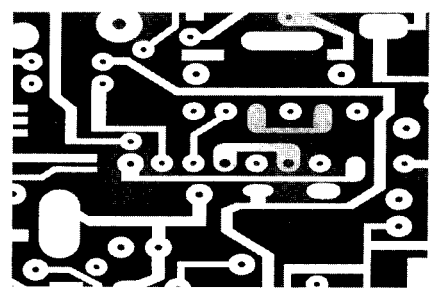
Phone : (03) 9629 5200
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E-mail: info@lt.com.au

This strategically planned module has been designed to facilitate frequent accessibility with high cost-benefit storage value by utilising available storage space for maximum effectiveness. The module's design is based on optimum interaction between people and structure, by charting workflows and retrieval characteristics. This produces exceptionally fast identification and retrieval, ensuring active file customers have immediate access to information with a minimum of fuss, (see photo of girl).

Active file storage and retrieval has clearly developed a long way from searching through cartons looking for individual files.

Enquiries:

Recall
Colin Manning
National Product Manager
Phone: 02 9427 3155
Fax: 02 9427 0434



Branch Reports

NT Branch

Another financial year has passed, during which the Branch celebrated its 100th Council Meeting.

At the Branch AGM this month we are looking to revitalise the Branch by rounding up some new Councillors to give the Branch some fresh direction. The growing need for records management training and education in the Territory is becoming increasingly evident.

During May the Branch co-hosted with PICS Consulting, the workshop, How to Apply AS4390 Records Management Standard. The seminar attracted 20 participants, which is an impressive turn out for the Territory, and all those involved agreed that it was a most rewarding day. The Branch is also arranging for the Records Management Program, which we expect to be well attended.

A possible reason for a revived interest in records management training could be the raising of the profile of records management in the Northern Territory Government which employs the majority of branch members. A Records Management Strategy for the Territory Government has recently been accepted and a range of initiatives are now being considered. These initiatives will involve the future employment of many local members of the RMAA.

Another of the challenges ahead for the Branch is the 1999 National Convention of the Association which is scheduled to be held in Darwin from 29 August – 1 September. The venue has been booked, and the Convention Committee will be established after the AGM, so the Branch is committed for the long haul.

Greg Coleman ARMA
Branch President

VIC Branch

Victoria has experienced an extremely difficult time during the first half of 1997 with the loss of several Councillors. Our thanks go to David Moldrich, Rosemary Kaczynski, Russ James, Candice O'Shaughnessy, Chris Hurley and Keryn Smart, who all resigned for a variety of reasons. Our thanks also go to new Councillors Ruth Burns and Barry Baker and returning Councillors Betty Powell, Tom Curtain and Kay Lewis and seconded member Ben Tosetto, who have volunteered to replace those who resigned.

In spite of the resignations Victoria has been very busy. Our annual State Seminar was held in April at Pinnacle Valley Resort (at the foot of Mount Buller). Whilst numbers were a little down on previous years the seminar was highly successful with members being treated to presentations from highly regarded speakers and as usual, a great social program.

In an effort to provide Councillors with an understanding of their responsibilities, Victoria has recently approved a set of Position Descriptions covering all Branch positions. Those members considering standing for election will now have the ability to gain an understanding of their potential role before nominating. Importantly, the Vice Presidents position includes the responsibility for developing a draft strategic plan. The first draft should be tabled at the August 1997 branch meeting.

As always our Education committee has been working hard and continues to support the courses run at Swinburne TAFE. The annual award for the most outstanding Records Management student at Swinburne goes to Mr Kevin Scott. The Victorian branch wish to congratulate Kevin who completed what is normally a 2 year part time course in 12 months and scored an amazing 7 high distinctions.

Our congratulations also go to Ms Sue Klein, Ms Rhonda Kinghorn, Mr Kevin Naismith, Mr Dennis Renfrey, Mr Tim Newbegin and Mr Owen Hatchard, who have all been approved for upgrade to Associate membership during the last 6 months.

Victoria's Local Government Chapter continues to achieve excellent results, with good numbers attending their last two meetings despite the industry being heavily preoccupied with Competitive Tendering.

Finally, the Branch has embarked on two important courses of action. Discussions with the Victorian Branch of AIIM have commenced on the possibility of conducting a joint State Seminar for 1998 and we have instigated discussion with the Public Record Advisory Council with a view to sponsoring the Council's proposed Records Management Award/Certificate.

John Sim ARMA
Branch President

NSW Branch

This year as usual is proving very busy for all members.

The Local Government Chapter under the guidance of President Chris Fripp has been working hard towards meeting their aims and objectives over the past year and their next objective is to conduct training programmes across the State.

These programmes will consist of seven workshops and have been taken from the record management training manual written by the Victorian Local Government Chapter.

A pilot for Flexible Delivery of Records and Information Management courses will be carried out through Mount Druitt College of TAFE. This pilot, initially, will be coordinated by the college and all enquiries should be directed to Julie Rohleder, Teacher of Record and Information Management, Mount Druitt College of TAFE, Mount Street, Mt Druitt, NSW 2770.

ACT Branch

On Thursday the 19 June the ACT Branch hosted its Annual Dinner at the Canberra Club. Our guest speakers were Ian Cunliffe and Anthony Willis, solicitors from Dunhill Madden and Butler. Their presentation "Legal Aspects of the Internet" focused on issues and implications when using the Internet. The dinner was well attended and the presentation drew many questions from the audience who also enjoyed good food, good company and fruitful discussions on the topic.

Following our AGM in July we are having the Office of Government Information Technology (OGIT) give a presentation by Carol Palmer Director, Information Management. Carol has been a member of the Information Management Steering Committee developing a whole-of-government approach to the management, control and access of government information. The committee has finalised the report "Management of Government Information as a National Strategic Resource" and Carol will inform us of the Committee's activities and outline the recommendations and strategies agencies will need to adopt to achieve effective handling of government information.

Following the presentation the Branch has invited members to participate in a Records Management Forum to have their say on issues concerning the Organisations they represent.

A very interesting presentation was given to members on 10 June by Sue McGovern, who was previously MIS Manager for the Royal Commission into the NSW Police Service. Sue spoke of the merging trends in the paperless courtroom, and faced a barrage of questions after her talk.

Talne Babikian has been busy developing an Internet page for the NSW Branch. It will contain amongst other things, a calendar of events which will be updated regularly.

A selection committee from the NSW Council met a number of times to select a conference organiser for the 2000 convention. The final unanimous choice was Waldron Smith, Conference and Association Management.

Ann Hampson ARMA
Branch President

The Branch Council will be in attendance to offer advice, hear queries or view points on matters relevant to Records Management, to foster discussion on the issues and challenges facing our profession, or offer points of view on matters relevant to records management.

On 25 June 1997 I was proud to present a prize offered by the ACT Branch to the Canberra Institute of Technology in recognition of High Achievement in the Certificate of Records Management. Giving the prize on this occasion was particularly important as the three recipients were the first students to complete the certificate IV in Records Management at the Canberra Institute of Technology in the ACT. The prizes were awarded to Kerrie Van Schieveen, Neil Mulherin and Iwona Pala, congratulations to you all, well done.

As the end of my term approaches for 1996/97 I would like to take this opportunity to thank all the members of Branch council and assistants for their valued contribution to Branch Council over the past year.

Julie Lenson ARMA
ACT Branch president

Branch Reports

WA Branch

Mentoring

A small but enthusiastic group of records management students, new graduates and experienced practitioners met in April to investigate the degree of interest in mentoring in the records management profession in Western Australia. Mentoring is certainly not new in the profession, but in the past any mentoring has been on a fairly informal basis. Paul Genoni and Ann Ritchie from ALIA have been involved in formal mentoring programs in the library profession for about 5 years and were invited to share their experiences with members. Paul and Ann described how the program began and how it has developed into a vibrant and exciting program for new practitioners, those in isolated environments and particularly for those still seeking their first position in the profession. Paul and Ann were kept busy answering a multitude of questions from the floor. From the meeting it is evident that a genuine need exists in this area and the Education Committee intends to pursue the matter.

Course Recognition

The WA Branch has completed the pilot phase of the Course Recognition Project. Applications received from the various institutions have been forwarded to the Federal Education Coordinator. The process has taken much longer than originally envisaged. Although an effort has been made to streamline the process as much as possible and thus keep work to a minimum for the institutions applying for recognition, the time needed to complete the paperwork for the applications is still considerable.

In a profession such as the RMAA, it is inevitable, and probably desirable, that members of the various educational institutions sit on the Education Committee. In the case of Western Australia, there has been a deliberate effort to have all three institutions represented on the Education Committee. This brings up issues of conflict of interest and confidentiality of

course content, etc, if applications are to be evaluated at the local level before being referred to the Federal Education Committee. To dispel any question of conflict of interest a deliberate decision was made by the Committee to step back from the process and to forward all applications directly to the Federal Coordinator.

The issue of site visits was raised consistently by participating institutions. All felt that a site/course recognition visit by a small panel is desirable as it would give a much better and fairer understanding of the actual courses and facilities offered by institutions. It was felt important that in any panel of this type a balance should be preserved between academics and experienced practitioners. Another advantage of a site visit is the ability to interview stakeholders, such as current students, past students, employers and academic staff on a one to one basis or as focus groups, which would add a whole new, more qualitative dimension to the process. It was emphasised by institutions that the course recognition visit process should be viewed a non-threatening process with mutual benefits for both the institution being assessed and the RMAA.

Meeting at Parliament House

Representatives of the RMAA and the ASA met with a number of concerned politicians, at Parliament House in April, to discuss various issues pertaining to the proposed new Western Australian public records legislation. It has been very refreshing to see the different approach at the Commonwealth level, where the proposed new legislation has been the subject of a frank and open review, with ample provisions for input from all stakeholders and all concerned sections of the community.

Margaret Pember ARMA

Chair, Education

June 1997

QLD Branch

The Branch has continued to provide members with opportunities to maintain up to date knowledge and information on issues relevant to modern records practices. The Branch conducted a seminar on the topic of Protecting Vital Records and Undertaking Risk Management. The forum provided participants an opportunity to hear at first hand from experienced practitioners the steps to preventing and reducing the impact of disasters. In June the Branch held a seminar on the topic of 'Evidence and Technology' with a speaker from the Queensland Law Reform Commission, which is undertaking a study into this area. Video tapes of each seminar are available for \$20 from the Branch Secretary.

As reported in the previous News report, the Branch conducted a highly successful seminar focusing on AS 4390. The speakers addressed a broad range of topics relevant to the Standard, identifying how the document can provide an invaluable guide to the better management of records. A video tape and seminar papers of the seminar are available for \$60 from the Branch Secretary.

Phillip Taylor, MRMA

Vice President

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