

INFORMAA QUARTERLY

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RMAA Directory

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PRESIDENT'S REPORT

Welcome to 2004, everyone should be back after vacations refreshed and ready to take on the new challenges. We were nearly unable to bring out the current issue of *infoRMAA* to schedule because the news material needed for this issue was not available in time. I have to note regrettably that our members are not making effective use of this organ of communication. The quality of *infoRMAA* is very dependent on contributions from members and I urge you to write an article for the upcoming publications.

History – 35 years ago the RMAA was officially launched in both Melbourne and Sydney in March 1969. This year is also the 20th year that we have been producing the *Informaa Quarterly*, which I must say has come a long way since the early days when each Branch was responsible for producing the magazine.

It was interesting to note that the Federal Council was formed in 1970 which consisted of the Executive from Victoria and NSW and state convenors elected came from Queensland, Tasmania and Western Australian. At that first Board meeting the Federal Council as it was known then, planned to hold the first conference in 1972 in Canberra and to join the International Records Management Council.

Other states joined as Branches of the Association as follows ACT and QLD in 1975, SA in 1976, WA in 1982, NT and TAS in 1986 and a recent addition of New Zealand in 2001. The Association was formed as a company in 1975.

Research – The National Board is in the process of developing guidelines for a research grant to assist in the development of recognition of the Association and/or the profession. This will be further worked at the March 2004 Board Meeting, however, this is advance notice to get your thinking caps on and start thinking what research you could undertake.

Web Access – Our new Members' Only section has been "live" for a few months and reflects efforts to improve access to RMAA services and products. Online registration is now able to be utilised by both members and non-members. The RMAA e-communities provides different forums for people to post items and ask those questions you've always wanted an answer to.

I hope you have checked out our new look web page @ www.rmaa.com.au, and checked out the members only page. If you are having problems logging on please contact Wendy Daw in the office. I hope you have the RMAA webpage bookmarked and use it everyday. It is being updated regularly and provides information on seminars, meetings, conventions, contact details and the 'members only' section that has many additional benefits to you as a valued member.

Membership – Membership continues to grow and it is encouraging to see Professional Members increasing rapidly. This will assist in our efforts to become recognised as a Profession. In line with our vision, there has been a concerted effort to widen our membership base and I request that if you know a certain field requiring specific targeting to contact either your Branch or the Executive Officer. Records Management is universal, and unfortunately some people just don't get that – but we will remedy that.

Governance – Although a separate report on Governance has been included I just want to reiterate the importance of good governance. The RMAA is a Company and as such is required to conform to the Corporations Act (and others). This requires a lot of policies and actions by the Board to ensure that the Association is ensuring the best for our stakeholders. Governance issues that the Board is currently addressing include:

- Ownership and governance structure
- The role of the Board
- Setting strategic direction
- Creating governance policy
- Running effective board meetings
- Board/EO/Branch relationships
- Monitoring performance
- Directors' and responsibilities
- Monitoring organisational achievements and compliance
- Financial responsibilities
- Risk Management
- Strategic thinking
- Evaluating Board's effectiveness
- Board Member competences, development and education

Board Meetings – The National Board meets four (4) times a year and has resolved that the



meetings will be rotated around the Branches. This will give the Branch (and members) the opportunity to meet with the Board and will create a more friendly and open approach to communication and issues can be addressed immediately.

Accredited Courses – We now have our first Registered Training Organisation (RTO) accredited for the delivery of the Recordkeeping Competency Training Units. After enduring the long process, Esset Australia was RMAA accredited at the December 2003 Board Meeting.

I must include a special thank you to the Directors' who have provided the utmost of professional dedication, tirelessly working for the greater good of the Association throughout Australasia. I must also congratulate our Executive Officer on leading the National Board towards better corporate governance as well as starting the long trek towards gaining professional recognition for records management that is so richly deserved. Also, Wendy Daw, who tirelessly handles the day to day requests that keep on coming.

I invite you to contact me to discuss any issue of concern, or any other matter.

Chris Fripp, MRMA
National President

EDITORIAL

It is with great regret that we announce the resignation of Virginia Bolger as editor of Informaa Quarterly. Virginia has been an asset to IQ for a number of editions and we would like to take this opportunity to thank her for her commitment to the role in the past.

The Board feels that the Association can no longer survive solely on the dedication of volunteer labour but that it should be committing resources towards areas of vital need. The RMAA have utilised a professional publisher and a professional web developer as required, for some time now. They further demonstrated their commitment this year by employing a professional Executive Officer and one of the next steps is to tender for professional Editorial services.

It is also with humble respect that we apologise to Virginia, as her resignation came about because we failed to communicate this intention to her prior to the December Board Meeting Agenda papers being released. At no time was any malice intended, nor were Virginia's commitment or capabilities in question, however the issue has caused Virginia personal grief and while this was never intended we do offer our sincerest apology to her and our members for any malcontent as a result.

On the lighter side:

In this edition you will find a lift out Supplier and Product Directory that also incorporates a quick reference guide of frequently asked questions such as how to unsubscribe from the listserv and how to get into the members only section. We hope that you find the lift out useful as a reference tool.

We are trying out some new themes in 2004, as follows:

February	Promotion of the records management profession
May	Technology
August	Professional development
November	Post national conference issue including review of conference and keynote papers

Something else we will be experimenting during 2004 is trial lift-outs. Specifically we will produce 2 Calendar of Events, detailing all known Branch and National events for the

upcoming 6 months. It is intended that these will be separate lift-outs and will be placed in the May and November issues of IQ. Of course it is always useful to keep an eye on the web for updates.

When the Board downsized last year each Director took on a Portfolio, just in case you missed it they are listed again here for your information:

Director of Marketing

Kristen Keley

Marketing & Promotions, Editorial (Informaa Quarterly), Conventions, Awards (J. Eddis Linton awards)

Director of eBusiness

Vacant

e-Records / transactions, Information technology (IT), Online business initiatives, Web, strategic and operational

Director of Standards & Legislation

Kemal Hasandedic

Australian and international standards, Australian recordkeeping / information legislation

Director of Economic & Finance

Thomas Kaufhold

Analysis and forecasting, Treasury and budgeting

Director of Education

Vacant

Competency standards, Course recognition

Director of Strategic Alliances

Helen Hancox, ARMA

Building and maintaining strategic alliances

Director of Governance & Ethics

Chris Fripp, MRMA

Ensure appropriate ethics and legal requirements are met for adequate and accountable governance

Director of Professional Development

Lyn Kickett

Roadshows, Seminars, Mentoring, Certified Professional Development (CPD Scheme)



Director of Chapters and Special Interest Groups (SIGs)

Vacant

Facilitate national Special Interest Groups and Chapters' Special Interest Groups

Please feel free to contact any of the Directors regarding their particular Portfolio (contact details can be found on the website) or our Executive Officer, Kate Walker regarding anything at all to do with the RMAA. Strategic planning is scheduled for the March Board meeting however for a general update on the Portfolios please refer to the reports contained within this edition.

Kristen Keley, ARMA
National Vice-President

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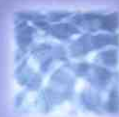
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AUSTRALASIAN & INTERNATIONAL

Happy Birthday to Us: RMAA 35 Years Old in March

Abstract

In March 2004 the RMAA will be 35 years old. This special paper by the National President gives members an insight into our beginnings and includes extracts from a manuscript that is currently being compiled, entitled "The Story of the Records Management Association of Australasia – The first 35 years."

From its original formation in 1969 as the Records Management Association of Australasia, the RMAA, has always drawn its strength from the hundreds of individuals who have given it their time and support.

The Association has achieved much for its members. Nevertheless, whenever members gather they talk not of the past achievements but of the enjoyment they have had in each other's company over the years. It is this bond of friendship upon which RMAA has been built.

Whilst people continue to share and expand their knowledge and take pride in being at the cutting edge of records management, the RMAA itself seeks continually to adapt its own structure and activities to help them do so.

The Early Days

This is the story of the first 35 years of the Records Management Association of Australasia (RMAA).

As was the case with most of Australia's associations, the formation of the RMAA national body grew from activities undertaken by State groups. In 1969, these activities were conducted primarily in Melbourne (Victoria) and Sydney (New South Wales) leading to State Associations being established in those two States.

The pilot committees agreed that the enthusiasm of officers of the then American Records Management Association (ARMA), including Miss Eunice Thompson, Crawford Jenkins, William P Southard, John D Culton and William Benedon, helped to get the Records Management Association of Australia under way. The "Records Workshop," conducted in March 1968, viewed ARMA publications and slides sent over from the United States which helped considerably in forming the objectives of the first pilot committee, which, in the ensuing twelve months, saw those objectives achieved.

Pilot committees were formed in Melbourne & Sydney in 1969 and autonomous State Branches were inaugurated. The branches immediately formed a Federal Council for RMAA and New South Wales' Tom Lovett was elected President. In one year, membership was approaching 400 throughout the Commonwealth of Australia and New Zealand. It was thought a NZRMA may be officially inaugurated in 1970/1971 but it was not until 2001 that the New Zealand Branch was actually formed.

Victoria established 1969

In the Annual Report of the Victorian Branch, **Mike Leigh** (President 1969 - 1970) stated that this Branch was the first Branch of the RMAA to be inaugurated (March 1969). Within three months, its membership had grown to 135 and members attending the General Meeting in June 1969 formulated the basis for a State Branch Constitution.

During the next six months, it became clear that the activities in which both the Victoria and NSW Branches were involving themselves in required proper coordination and that if records management was to become an important science in the business administration field a national authority would be essential.

Efforts were directed towards the establishment of Federal Council for the Association which would be representative of State Branches as they became inaugurated. This would have the ultimate effect of relieving the Victoria Branch Council as well as other Councils of the following responsibilities:

- Development of educational material,
- Publication of an educational journal,
- Development of internal procedures standardisation,
- Promotion of new interstate Branches,
- Co-ordination of study projects,
- Liaison with overseas records management institutions,
- Structuring of fees, membership status, etc,
- National publicity & promotion,
- Negotiation with Federal education authorities.

Unfortunately, Federal developments were not something in which the members, to whom we are committed, could participate. However, it was emphasised during the early days that, come what may, the Association would do all in its



by **Chris Fripp, MRMA MAICD AMIM
AdvDipBus(RKg)** National President, RMAA

power to ensure that value for money, in a tangible format, should be provided. To this end several functions and events were organised.

The Education Committee made a determined effort to stage a seminar, which would cover, at least in part, all of the major fundamentals of record management. Friends from New South Wales and Tasmania joined in with local members in presenting a series of most successful papers and discussions. Later in the year another full day was allotted to discussions on mail management, equipment and the application of the computer to records management.

New South Wales established 1969

Mr W. J. Latona, Head of the School of Commerce, Sydney Technical College, who was responsible for planning Commerce Courses, gave the inaugural address. Mr Latona commented on the great potential of records management as a profession in Australia. "The pilot committee," he said, "has started a revolution."

Mr Latona said that, by the act of inauguration of the RMAA, records management, the newest profession, had been born. He said, "The development of professions resulted from the community calling out to those people whose interests and experience qualify them, and judging by the rapid, widespread interest and enthusiasm in the Association, records management will become a vital force in business administration." He also stated that there was a gap in business education which the Association should be able to close.

J. Eddis Linton, Chairman of the Business Archives Council of Australia (NSW Branch) and a member of the pilot committee spoke on "The Dynamic Objectives of the RMAA". He said, "The Association will fulfill four main functions...

1. Organise formal courses for people from filing clerks and secretaries to information managers.
2. Provide a source of information on the subject ... Principles of Information Management and secondly, Promulgation and Interchange of Information.
3. Form study groups to develop methods, ideas and standards.
4. Carry out research".

In addition, the Association will develop professional status for those engaged in records management and records work. Mr Linton said, "It is because we have not had an Association that we have had no training courses and no

professional status, with the results, bad records problems and chaotic paper proliferation."

Other Branches

In 1975 the Federal Body of the RMAA distributed information leaflets, membership application forms and applications for higher status to Queensland, the Australian Capital Territory (ACT) and South Australia and suggested branches be formed in those states if sufficient interest could be generated.

A seminar titled "Enter the Paperless Office - A New Era" which was to have been held in Adelaide as well as the Eastern States in 1976 was cancelled due to insufficient registrations. Subsequently, ACT and Queensland were formed in 1975 and South Australia was formed in 1976.

The formation of other branches took place over a number of years after discussion with the Federal Body of the RMAA and distribution of membership forms and applications for higher status.

Western Australia - 1982
Northern Territory - 1986
Tasmania - 1986
New Zealand - 2001

Federal Council formed

At the July 1970 meeting the following officers were appointed to the Federal Council:

President: **Mike Leigh** (VIC)
Secretary: **Tom Lovett** (NSW)
Treasurer: **Eddis Linton** (NSW)
Vice President: **Harry Nunn** (VIC)

The Federal Council appointed Convenors of State Branches:

Queensland: **David Godfrey**
Marcel Wykman
Tasmania: **Bill Gough**
Western Australia: **Bruce Davenport**

A national conference of the RMAA was planned for October 1972, to be held in Canberra and **Harry Nunn** was appointed Conference Coordinator.

The Federal Council appointed three members to represent Australia on the International Records and Information Management Federation Steering Committee. Chairman of the IRIMF Steering Committee was **Tom Lovett**.

Informaa Quarterly - Reflections on 20 Years

2004 marks the 20th anniversary of the first publication of **Informaa Quarterly (IQ)**. With the publication of the February 2004 edition, for 20 year's original articles on the state of records management have been published in a journal for records management and about records management. Looking back over 20 years is a sobering experience but it reveals that **IQ** has traveled a long way from humble beginnings to a sophisticated journal for which the RMAA can be proud.

It is apparent that the nature of records management has changed considerably, the first edition contained just two articles, both originating as papers delivered to the 1st National Convention held in 1984 at Coolangatta, Queensland. The articles covered office automation in a large American company and an analysis of office automation technology in NSW Local government.

It is interesting to read the editorial written by then National President, **Harry Haxton**. He wrote: "A number of innovative steps have been taken to improve communication with our members and to make our Association more visible within the business community...I urge all members to contribute to this publication and to help make our Association the leading voice within the Information Technology field."

The fact that it took until 1984, some 15 years after the Association was formed, for a national journal of the Association to be published is a telling commentary of the early years. States interests often outweighed the pursuit of higher ideals such as the promotion of records management as a profession able to stand on its own feet and develop an identity of its own.

By any measure, the publication of **IQ** has been a success. Through its 20 years, it has managed to bridge the gap between a formal journal of serious study in records management and a commercial publication focused on advertising.

After the launch of the first edition, responsibility for publication rotated between the states. It is clear which states published which edition. A quick glance at the covers in the early years reveals the Sydney Harbour Bridge (February 1985), AFL and Ansett plane (April 1985), wild flowers (August 1985), Ularu (November 1985), a girl in a bikini (May 1986) and trams (November 1986). Rotating responsibility

between the branch's to publish **IQ** lasted up to February 1992 when publication became the responsibility of an editorial team comprised of **Jim Shepherd, Thomas Kaufhold, Judy Watts, Ray Holswich** and **Ross Thompson**.

The editorial written by then Federal President Ray Holswich announced a number of 'exciting changes concerning its image and direction'. This edition also contained the results of a membership survey into the perceptions, priorities and views of members. Some 14 year later the survey still makes sobering reading. Indeed, it is interesting to see many issues that were of concerns to members are still relevant today.

One thing that **IQ** has tried to do over the years is to reflect members concerns. How these issues and concerns have been measured and written about is variable. In over 20 years there have only been a handful of letters to the Editor. Understanding the perceptions of the reader is one of the more difficult tasks of the editor. A balance has to be made between presenting articles of interest and gaining sufficient articles to fill an edition. Like any journal there is a balance to be struck between presenting articles that are of interest to a diverse readership and overlooking important matters such as debate about the place of the RMAA. It is interesting to note that there are few articles about the place of the RMAA or discussion regarding the way the Association is run.

It is appropriate to suggest that the journal has been in some ways a reflection of our soul. When we read an edition of **IQ** do we see ourselves is happy enough not be confronted by ideas that threaten our world? The absence of radical views or articles that question the existing structures and systems suggest that we are, by and large, a contented bunch.

However, this does leave **IQ** something between a collection of articles of interest but not likely to provoke heated discussion of debate and a professional journal that strives to add flesh to the knowledge base, questions the norms and sets a new agenda. In the middle is **IQ**, the articles have in the main been reflective of the body of knowledge we feel comfortable with. Few articles have striven to question the norms we know. Does this matter? In some ways it doesn't. However, it does represent a lost opportunity. The lost opportunity to expand understanding, think about problems in new

by **Philip Taylor, MRMA**

Co-editor of **InfoRMAA Quarterly** from 1985-86 and 1988-89

ways and advance the understanding of records management beyond the immediate membership. The absence of a readership beyond those who have an interest in records management means that opportunities to promote and understand records management are not being presented to a wider audience.

IQ has provided the opportunity for articles to be written by people with something to say. This is especially important for the information management professional who has few opportunities to articulate and argue a point. The greater number of opportunities there are to write and be published increases the knowledge base of records management. The ability to articulate and present a case is a foundation skill of a professional information manager. The ability to be able to write clearly is a skill demanded by employers. There is no better way to show this skill to be able to put in a job application a list of articles published in **IQ**.

However, there is still that excitement, the four times each year when the plastic wrapper arrives in the mail. Amongst the junk mail and bills, the **IQ** provides an opportunity to delve into the world of records management. We have become familiar with routine. The front cover usually features some eye-catching colour. In recent years, the covers have ranged from the avant-garde (May 2001), to those that make you wonder if your eyesight is failing (May 2002). Others just leave you trying to work out (November 1999). Each 4th edition features the site of the next National Convention ... yes with the Sydney Harbour Bridge again (November 2000)! Inside there has been numerous changes to style and format but the layout stays much the same. The National Presidents have their say on the latest news on the Association and this is usually followed by a selection of articles maybe wrapped up in a theme or as a random collection.

A study of the articles over the years reveals a range of authors. By far the greater majority of authors are producing original works that build a broader understanding of what records management is about. It is interesting to track the changes in emphasis of articles over the years. The early years were mostly concerned with descriptions of work practices and routines to which were added articles on records disposal, organising records program, training and secondary storage. The first article on automated records management systems appeared in February 1987 and the first article on document management systems in June 1989. From a 2004 perspective these articles reminds us that not a lot has changed but they do capture the spirit of those early years where software and EDMS were a novelty. In records continuum

terms this a record of the social aspects of records management.

For the records management student, **IQ** is an invaluable source of original material. Articles on every facet of records management have been written making **IQ** invaluable for students. What remains in doubt is the use by students in other study areas of information management or business of articles in **IQ**. It won't be until other students in related disciplines of interest use **IQ** that there will be the opportunity to make records management more known and understood by the wider community. Getting **IQ** into a wider audience is one of the big challenges for the RMAA.

Advertisements have played a part in the history of **IQ**. The first advertisements appeared in Volume 2 and have been a regular feature of all subsequent editions. Fortunately, advertisements have never dominated **IQ**. A conscious decision by successive editors has that seen advertisements play a subtle role of keeping readers informed about products and services available but never dominate. It is a policy decision of some significance that has allowed **IQ** and its articles to be the dominant feature rather than the paid advertisement.

In a similar way the Branch news feature provides an opportunity to catch up on happenings round Australia. In reading 20 years worth there is a marked similarity in content and style, probably a reflection of the effort it takes to make Branch news item for each edition different from the preceding one. There is only so many times that reference to seminars and social functions can be made interesting.

And the next 20 years? If the first 20 years is any guide then the next 20 years will be one of consolidation and unless there is a dramatic change in editorial policy, **IQ** will remain much the same. Whether this is good or bad depends on your perspective. The publication of a journal like **IQ** is an evolutionary process. The changes come gradually and slowly and usually mark some change in views of the editor.

While **IQ** will remain as the flagship publication for members it should not be forgotten that there is a very large world outside of records management. The next challenge for **IQ** will be to expand its horizons and start having original articles published in **IQ** also published in other journals. It will be then that **IQ** will be recognized as an authoritative source of information of contemporary records management issues and then a credible start has been made to getting records management issues out into the wider community.

Discussion Paper on Records Management Classification: Feedback Wanted

by Stephen Bedford

In June 2002, Standards Australia's IT 21 Records Management Committee approved the establishment of sub-committee IT-21-9 Records Management Classification. The goal of this sub-committee is to develop a handbook on the structure and construction of records classification tools in accordance with the international standard AS ISO 15489 – 2002: **Records Management**.

As a preliminary step, the IT-21-9 Sub-Committee has identified a number of issues in Records Management Classification and has developed a Discussion Paper to gather a wider perspective on the construction, implementation and use of records management classification tools. The records management community is being asked for comment, and feedback will support the preparation of a handbook on records management classification, to support AS ISO 15489

The Discussion Paper will be of interest to Records Managers, Records and Document Management software vendors, Records Management Regulatory bodies and Records Management consultants. It may be of interest to Information Managers and Knowledge Managers (particularly those who use business classification as an internal language), Information Technology professionals (particularly those who are involved in implementing Electronic Document Management systems or those who based directory structures on business classification) and Librarians (particularly those who are carrying out information audits).

The Discussion Paper is available on the RMAA website <http://www.rmaa.com.au> and comprises two main sections:

- Project background and scope, and
- Issues.

The project background and scope outlines the reasons for the formation of the IT-21-9 sub-committee, the perceived need for a handbook on developing records classification tools, and tentative notes on the scope of the proposed handbook.

The issues section lists a range of issues that have been canvassed by the committee. They have been divided into the following broad areas:

- Constructing classification tools
- Language and terms
- Scope notes
- Alphabetical and hierarchical presentation
- Presentation of classification strings
- Electronic vs paper environment, and
- Realising the benefits of classification.

The list of issues is not comprehensive. Many of the issues are presented in a 'points for and against format' and/or with focus questions.

How to provide comment

Members of the records management community are invited to comment on any aspect of this discussion paper: on the project scope, the issues raised or other issues which the committee may have overlooked.

Comments can be emailed to IT-021-09@adm.monash.edu.au or mailed to: Records Management Classification Feedback C/- Tamara Puli Assistant Records Manager

Building 3a, Records Management Office
Monash University
Clayton, Vic 3800 AUSTRALIA

Deadline for comments is Friday 1 May 2004.

Making a Records Manager's Services Sexy



by **Janine Nealy**
Information Management Consultant,
Records Solutions Pty Ltd

Abstract

Success or failure for records management programs depend on how well the records managers can promote and market them within their organizations. They may be required to go beyond their comfort zones and become "promoters" of their own importance and value to the organizations. To do this, they must know their own strengths, weaknesses, skills and limitations.

The paper is a summary of the author's presentation to the 20th RMAA National Convention in Melbourne, Victoria, in September, 2003.

Organizations are, I believe, well aware of the importance of internal and external information but there are still many corporate executives, managers, upper-level administrators and team members that have little to no understanding of what a comprehensive document management program should be.

As a result, these people are also unaware of the impact a comprehensive document management program can have on an organisation.

Today, the people promoting good records management need to be both information services specialists and business executives. They need to be business executives in order to explain or convince teams and organisations of the value of document management in terms of money, time, energy and legal security. And they must be business executives in spirit and practice, even when not in title.

The 1990's have been called many things, everything from the Decade of Turbulence to the Dawn of the Information Age. As **Dr Mark Langemo** (1) wrote

"The 1990's will be a decade where being competitive and successful will be highly dependant upon having almost instant access to documents and information".

Surprisingly, the information age has lead to an increased need for marketing records management rather than a decrease. With corporate and government downsizing, the success or failure of a records management program is dependant upon how well a records manager is able to promote and market a program.

In this fight for survival, records managers are required to go beyond their 'comfort zones' and become promoters of their importance and value to an organisation. They must undergo evaluative processes to determine: who are we, who are they, where would we like to go, and how to get there. Resolving these questions will provide the basis by which a records manager will be able to market, promote a program and ensure its future growth.

Perception is the problem

Records managers will often find that perception is 90% of the problem in marketing a program. They must take matters into their own hands and change the image of their profession. The foundation of this change is to convince themselves and others that they have intrinsic value to the organisation in managing **anything**. Confining themselves to stereotypical ideas of records only closes the doors to opportunities. A whole world awaits records managers willing to go outside of their comfort zone and pursue their dreams. Having a dream and direction determines where to go and how high.

The successful records manager will individually be the most effective promotional tool as personal selling is high on the list of promotional strategies to be used. Win over senior management; consult colleagues and encourage collective ownership; encourage records management staff members to recognise their own importance; streamline the records management identity; use feedback; exploit vital records; and ensure organisational recognition of the value and benefits of records management.

The trends and major issues characterising records management marketing are rooted in the challenges that face documents management in this decade. The ten major issues facing promoters of good records management are:

1. Selling the need for document management to management and to support personnel
2. Determining the place of records management in the structure of today's and tomorrow's organisations
3. Clarifying the roles of responsibility
4. Implementing the fundamental
5. Determining an appropriate 'mix of media'

6. Integrating records management systems with office automation and other systems
7. Disaster recovery planning
8. Selecting and implementing records management software
9. Recruiting skilled personnel
10. Continuing education and training

The most obvious of these points is the first; selling the need for document management to the organization's management and support personnel.

It is essential that there is awareness of the positive impact an efficient RM program can have and of the dangers likely if there is no such program. Records management is not safe from budget cuts and these dangers are much greater when decision-makers are not aware of the important role RM plays.

One of the essential features of records management marketing is a records manager's ability to establish a relationship with the IT department. The concepts of the 'information systems taskforce', the 'information systems committee', and other such team-oriented approaches are becoming extremely popular. The records manager needs to establish close working relationships with the organization leaders and the heads of information systems, accounting, finance, telecommunications, etc. Such relationships will further promote records management principles and the profession itself.

Here's the way to go.

So, the guidelines to all you records managers are these:

Be aware of current trends, gain knowledge and skills, be aware of current literature about records management, play an active role in records management networks (eg RMAA), participate in continuing education training and adopt an entrepreneurial (or **intrapreneurial**, as the case may be) outlook. These are the tools that records managers need in order to survive and prosper.

To sell our RM program to our organizations, we must be able to sell it to our most critical client: **ourselves**. We must believe in the RM program and its goals. We must **personify** it in our actions and results.

To actualise the marketing program we must follow a simple Triple E philosophy:

EMBRACE the organisational goals and make them part of our overall RM program goals thereby ensuring that we are on the same page as the rest of the organisation. We will find that the implementation of these RM goals will merge with organisational goals giving them greater acceptability.

EMBODY: Larger retail stores like Myer or David Jones will always tell their employees that **they are the company** whenever they serve a customer. Similarly, records managers must be the personification of the RM program and its goals. In other words, put our name to it. The success of our RM program will depend on our wish to make it succeed. If we are not willing to associate our names with the programs, we can't expect others to do so.

EMPOWER ourselves to control our destiny and bring initiatives to the table. If we believe in our goals and have confidence in our abilities, we can make things happen! There are many opportunities for organisational savings in the RM area but they will never come to fruition unless we are willing to 'stick our necks out' and take the initiative to address them. Yes, there are risks, but the rewards will be our own.

The Author

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Role and Work of IT 21, the Australian Standards Records Management Technical Committee



by Judith Ellis, BA (Hons), MA, MRMA, AIMM, MIPAA,
Managing Director, Enterprise Knowledge Pty. Ltd.

Abstract

This paper is reproduced from a presentation given at the November 2003 meeting of the RMAA Perth Branch. It summarises the role, composition and work of IT 21 - the Standards Australia Technical Committee on Records Management, and its sub-committees. One of the major products from IT 21 was AS ISO 15489 - Records Management. The positioning of this standard within a business framework relevant to today's organisations is highly important for its use and success. To assist in this, a new Standard on Recordkeeping Compliance is emerging.

Introduction

The process of developing an industry practice standard is extensive, collaborative and thorough. This paper is a snapshot of these processes through the role and work of IT 21 - the Standards Australia Technical Committee on Records Management. It also considers the positioning of the Australian Records Management Standard, AS ISO 15489, and provides some background to the purpose and structure of the forthcoming compliance standard for recordkeeping.

Standards are accepted specifications or codes of practice that define materials, methods, processes and practices. They provide a basis for determining consistent and acceptable minimum levels of quality, performance, safety and/or reliability.

There are four types of standards:

- Design Standards (or codes) for, for example, engineering and building projects
- Safety Standards providing guidance on safety in health, life and property matters
- Test Methods used to establish conformity with a specification, and

- System Standards that specify requirements for the development and implementation of management systems like AS ISO 15489.

Standards such as AS ISO 15489 and its predecessor AS 4390 are derived from the industry in which they are to be used. They are the outcome of a defined industry need, clearly articulated to and agreed by organisations like Standards Australia, for an Australian product, or the International Organization for Standardization (ISO) for an international standard. They are developed by industry through broad-based representation of stakeholders on a responsible technical committee. They are agreed to by industry through extensive consultation: commenting and voting processes.

Standards Australia International Ltd is an independent, not-for-profit, peak standards writing body, trading under the name "Standards Australia". Its core activity is the development of national standards. It is also involved in a number of other business activities, such as product and systems certification, knowledge management, training, consulting, etc.

Standards Australia is funded from the sales of publications, membership subscriptions, royalties and dividends from its subsidiary companies.

It has an extensive technical infrastructure to manage the governance of standards development, including the Standards Development Board, Sector Boards, Task and Coordination Groups, the Joint Technical Management Group and a raft of technical committees that are responsible for the preparation and content of a standard.

The technical committees are formed on a representative basis from nominated personnel from associations or organisations concerned with or affected by a particular standard. Representation is carefully balanced and consensus decision-making principles are used. In turn, the technical committees may also comprise sub-committees and working groups - often as a way to divide up the work. IT 21 is an example of this, with sub-committees IT 21/1 to IT 21/9.

Development of a standard

The process for development and approval of a standard is extensive within layers of Standards

Australia's procedural requirements.

As noted, the project must be initiated and undertaken totally on a need basis. Various issues are considered before projects are approved and commenced by Standards Australia, such as:

- National benefit,
- International considerations,
- The cost benefit and resource implications,
- The need to support regulatory, industry and community demands and
- The level of involvement of all parties in the development of standards.

The normal stages in the preparation of a Standard are:

- Preliminary draft
- Committee draft or drafts
- Public comment draft
- Final draft for postal ballot to all committee members.

This process is strongly governed by two key processes, transparency and consensus. This gives standards their authority and widespread acceptance. Standards Australia defines "consensus" as: "General agreement, characterized by the absence of sustained opposition to substantial issues by any important part of the concerned interests, arrived at by a process that takes into account the views of all parties concerned while reconciling any conflicting arguments".¹

"Transparency" means that "notification and all information on current work programs and proposals is available to all interested parties. Transparency also includes the concepts of openness, participation on a non-discriminatory basis, and impartiality".²

IT 21 - Records Management

This is the parent technical Committee that has facilitated the development of a number of records-related standards since 1996 including, most notably, AS 4390, ISO 15489 and AS ISO

ISO 15489. Although still called "Records Management" IT 21 sees its scope as including "recordkeeping".

Its mission is to provide direction and best practice guidance for the design and application of recordkeeping practices, process and functions.

The committee was established in 1992 in response to a demand from industry for a records/document management standard to feed into, or support the ISO 9000 quality systems compliance regime. It initially involved 20 to 30 people across five or more sub-committees undertaking the development. This took four years of deliberation, drafts and consultation, and AS4390 Records Management, parts 1-6 were the result in 1996.

The same year, AS 4390 was submitted to ISO for consideration as a model for an international records management standard. An ISO Technical Sub-Committee, ISO TC46/SC11, was established to develop this initiative. It was administered and chaired by Australia, through IT 21. ISO 15489 was produced in 2001 and adopted by Australia as AS ISO 15489 the following year.

The current membership of IT 21 is 16 people representing stakeholders such as the Australian Society of Archivists, the RMAA, Institute of Information Management, universities, the National Archives of Australia, the Public Records Office, Victoria, the Institute of Internal Auditors and some Government departments. The also include the chairs of its sub-committees.

The ongoing functions of IT 21 are:

- Development of relevant industry standards.
- Chair of ISO TC46 SC11, and administration of the Secretariat.
- Co-ordination and receipt of reports on the work of the sub-committees.
- Business planning.
- Marketing.
- Industry awareness and liaison.
- Liaison with other sub-committees, e.g. Health Informatics, Computer Applications, Corporate Governance, Knowledge Management and others.

IT 21 sub-committees

The IT 21 sub-committees are as follows with a brief with a brief description of each description of each:

•IT 21/1, 21/2, 21/3 - AS4390

•IT21/4 - Work process analysis

•IT21/5 - Compliance

•IT 21/6 - New Zealand

•IT 21/7 - Recordkeeping metadata

•IT 21/8 - AGLS

•IT 21/9 - Records management classification

IT 21/1, 21/2 and 21/3 sub-committees were responsible for drafting components of AS 4390 and are now defunct.

IT 21/4 - Work Process Analysis

This sub-committee, under the very able leadership of Sydney University archives and records manager **Anne Picot**, was tasked with developing a tool to be used for undertaking work process analysis and description specifically for recordkeeping purposes.

It has broad membership representation including government, private sector, industry bodies and universities. It produced Standards Australia's AS 5090-2003, Work Process Analysis for Recordkeeping, released last year. The scope of AS 5090 is well explained as:

"In a recordkeeping context, work process analysis ...refers to a descriptive and analytical account of work processes in actual workplaces in real time...(this is) distinguished from analysis of workflow as defined by the Workflow Management Coalition, which specifies the purpose of the analysis as automation."³

IT 21/5 - Compliance

IT 21/5 was established in 2002, to develop a compliance infrastructure for recordkeeping, specifically one which enables organisations to demonstrate compliance with AS ISO 15489.

Initially the product is planned to be an interim Recordkeeping Compliance Standard, to be released in 2004. The purpose of this is:

- To test the Australian market and
- To enable participation in some parallel work in this area at the international level through ISO TC 46/SC11. The model developed by IT 21/5 is under consideration for an international standard on recordkeeping compliance, so the local and international processes can run concurrently, but independently.

Chaired by this author, its representation includes:

- Government departments working in audit, recordkeeping policy and standards, electronic records, compliance in information systems;
- Large private sector companies;
- Universities
- Corporate governance interests and
- Overseas interests such as Japan and Canada.

The content of the proposed compliance standard is discussed further in this paper.

IT 21/6 - New Zealand

This sub-committee exists to enable joint and parallel work by New Zealand stakeholders interested in Australian and NZ standards development in records management. Its original task was to create a NZ Guide to AS4390 and ISO 15489. This is now largely out of date but is available at www.caldeson.com/RIMOS/nzguide.html.

The sub-committee is currently being reconstituted with some interest in working on electronic metadata.

IT 21/7 - Recordkeeping Metadata

Rather than develop yet another set of jurisdiction-specific metadata, the scope of this sub-committee, led by Sydney recordkeeping consultant **Barbara Reed**, is to co-ordinate a collaborative effort across Australian government jurisdictions to work on an Australian standard for recordkeeping metadata under IT 21/07 stewardship.

The existing committee membership will be augmented by COFSTA institutions that have been invited to join as representatives of relevant government jurisdictions and work on the latest draft.

IT 21/8 - AGLS

Led by **Adrian Cunningham**, National Archives of Australia's Director of Recordkeeping Standards and Policy, the sub-committee brought the existing work on the Australian Government Locator Service (AGLS) to the Standards table with the aim of expanding the AGLS to non-government sectors. The outcome in 2002 was AS 5044 -2002, parts 1 and 2.

The role of IT 21/8 is now:

- Ongoing maintenance, review and revision of AS 5044 - AGLS Metadata Element Set.

- Consideration of options for the development of support material such as case studies, business cases, handbook and/or guides for the integrated implementation of AS 5044 with other metadata standards.

IT 21/9 - Records Management Classification

This sub-committee, formed in 2002 is led by **Stephen Bedford** of the Australian Broadcasting Authority and has 15 members around Australasia including consultants, records managers and representatives from public records and archives institutions. Its scope is to produce a handbook about the structure and construction of records classification tools such as thesauri and records classification schemes to support recordkeeping systems developed in accordance with AS ISO 15489. A Discussion Paper is being prepared for distribution to the records management community early in 2004 seeking feedback to inform the development of the Handbook.

Positioning of AS ISO 15489

The work of IT 21 is not only to respond to the needs for records-related standards within government and industry. It is also to identify how and where records-related standards can or should be applied to business practice, in any sector. It is important that IT 21 positions products such as AS ISO 15489 within a business framework relevant to today's organisations.

For example, various business imperatives exist that necessitate good recordkeeping:

- Compliance and corporate governance: e.g. legislation, regulations, standards, rules and codes that govern or have some impact on every organization. Risk management is high on the agenda.
- Business continuity and/or business success be it performance, or profit. This includes factors such as cost savings, informed decision-making, consistency and continuity in what an organization says and does, managing customer relationships, etc.
- Research, intellectual property or strategic planning imperatives. The organization needs to know what it owns, its obligations, rights and debts (including intellectual property).
- Corporate culture and organisational identity. The organization needs a frame of reference for the present and the future. This links with using information to build and share knowledge.
- Many standards are used by organisations to guide various operations and business

practices, such as Quality Systems (ISO 9000 2000), Risk Management (AS/ANZ 4360:1999), Corporate Governance (AS 8000-8004: 2003) and Complaints Handling (AS 4269-1995). These standards all say that records must be kept, but they do not clearly say how this should be done.

- In essence, records provide the evidentiary framework to meet these imperatives. AS ISO 15489 provides the infrastructure for keeping adequate evidence of business, evidence which: Can be used for improving a business, eg. performance, R and D, customer service. Supports policy development and decision making
- Enables organisations to meet regulatory requirements, audit and protects them in litigation or other dispute
- Enables organisations to provide the proof of compliance in relation to other practice standards.

Purpose of the compliance standard

Why would IT 21 decide to develop the compliance standard when there are already nearly 80 pages of AS ISO 15489, parts 1 and 2? AS ISO 15489 provides the principles and the 'how to' for good recordkeeping, to meet whatever business imperatives are important to the organization. The compliance standard enables an organization to check, assess, measure that in fact it has understood the principles and done the 'how to'.

The compliance standard:

- Is a tool to enable organisations to demonstrate compliance with AS ISO 15489.
- Provides a benchmark for measuring the quality of a records management program and its application in any organization.
- Is for use in the Australian context.
- Applies to public, private and not for profit organisations, small or large organisations.
- Could be used by any organization for self auditing purposes, or by a third party conducting an independent audit using the same tool.

Structure of the compliance standard

The compliance standard is modelled according to recordkeeping processes, for example: recordkeeping framework, creation, capture, retrieval, access, storage and preservation, disposal, etc

For each process, it provides:

- The criteria to meet.
- Level of application, i.e. organisational level or system level.
- Explanations of the criteria.
- Sample (audit) questions to ask
- Examples of verification, that is, what evidence is there that criteria have been met?

It provides cross-references to AS ISO 15489.

An Example

Section 6 of AS ISO 15489 is "Policy and Responsibilities". It says: 'An organization seeking to conform to this part of AS ISO 15489 should establish, document, maintain and promulgate policies, procedures and practices for records management to ensure that its business need for evidence, accountability and information about its activities are met'.

Section 6.2 says:

- Organisations should define a policy for records management.
- Organisations should ensure that the policy is communicated and implemented at all levels in the organization.
- The policy should be adopted and endorsed at the highest decision-making level.
- Responsibility for compliance should be assigned.
- The policy should be derived from an analysis of business activities.
- Policies should be regularly reviewed, etc.

The Compliance Standard would say:

- Criteria: Records management policies, procedures and practices appropriate to the organization's business needs and regulatory environment are established, documented, maintained and promulgated in the organization.
- Explanation: further explanation of this if necessary.
- Questions
 - Does the organization have a records management policy?

- Has the policy been authorised at an appropriate senior level?
- Does the policy cover all records, in all formats, in all business systems?
- Does the policy identify legislation, standards and codes of practice to which the organization or its employees are subject?
- Has the policy been promulgated throughout the organization? How?

•Verification

- The records management policy statement is signed off by the organisation's CEO or senior management delegate.
- The policy is promulgated at all levels.
- The policy is supported by operating procedures, business rules, manuals etc.

Use of the compliance standard

The compliance standard can be used for a variety of purposes:

- Specific records management assessments, which can be enterprise wide, or it can be for one area of the business.
- As a benchmark measurement tool - to see where the organization is, or where it is compared to other organisations.
- For a gap analysis, looking at where the organization is and where it should be in relation to AS ISO 15489.
- To identify areas for corrective action.
- To develop broad-based strategies for recordkeeping.

It is expected and hoped that it will be used mostly for the latter three purposes, to enable organisations to assess the adequacy of their recordkeeping framework and to develop strategies to meet broader organisational needs.

Conclusion

IT 21 and its numerous sub-committees have involved many experts on a voluntary basis from the records, information and other industries over the past 12 years. Their work has provided national and international models for recordkeeping, and related activities. It is important that the standards resulting from this process continue to be reviewed, kept current and highly relevant to the business imperatives of modern organisations across all sectors.

This alone is a challenge, and one which requires continued commitment and input from the information management industry as a whole, through comment on discussion papers, implementing these practice standards and providing feedback on use, and through highlighting additional or changed requirements as technologies, our organisations or business imperatives change.

The Author

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Ms Ellis has contributed to a number of professional conferences and publications, edited three books and is currently involved in teaching, course advice and development, and assessment at four universities. She is also undertaking applied research projects in knowledge management.

Endnotes

¹Standards Australia, Standardization Guide No.1, Preparing Standards, 14 October 2002, p1.

²Ibid

³Standards Australia, AS 5090-2003 Work Process Analysis for Recordkeeping, s.1, p.5

⁴Standards Australia, AS ISO 15489.1-2002 Records Management, p.5

An African viewpoint

I'm finally learning Linux. What is your new year plan?



By **Shadrack Katuu**

Having recently picked the habit of reading **The Economist** magazine, I was drawn to The technology section of The World in 2004 special edition. At the beginning of the year it is always intriguing to read the insightful opinions of industry leaders and then have the hindsight at the end of the year to see what happened to their predictions.

In the recent issue, **Larry Ellison**, the CEO of Oracle, identifies three ideas "whose time has come." He states: "if I were to identify three things which will matter not just in 2004, but for a long time to come, they would be: Linux; grid computing; and software as a service."¹ My immediate attention was drawn to the first prediction: Linux, the one thing I had set for myself to learn in 2003 is Linux. I was so serious about it that I managed to attend the first meeting of a constituting group of Linux enthusiasts and newbies and even won myself a free copy of RedHat Linux version 7.2. That was almost six months ago.

Allow me to digress for a bit. At the end of 2003, the World Bank Institute and the International Records Management Trust hosted an e-discussion on "Electronic governance and electronic records."² Looking through the very rich and insightful summary document of the discussion, a statement stood out within one of the strategies for seeking technological solutions.

"Support the development of open standards...for computer software and then encourage the development of an affordable, "simple" self-contained standard technology platform, consisting of hardware and software that are "open" and accessible through the web, along with sustainable power sources and telecommunication networks to ensure wider access."³

Why did the statement stand out? Because two of my peers, both independent RIM consultants running one-person businesses in two different continents (unknown to each other) had, over the last few months, consistently vowed actually to develop these standards and more than that, actual open source products and could be distributed at minimal cost. Speaking from their personal consulting experience, they managed to convince me that the path to open source solutions is both desirable and do-able. Not only

is it economically more accommodating for small institutions and economically challenged governments, the advantages of lateral operability would address a lot of the technological challenges bewildering technophobes and neophytes around the world.

So, why haven't they done it? Maybe they are like me, that Linux software package I got more than 6 months ago is still in its box, never been opened. I never seem to have the time, important as it maybe. As for my two friends, willing as they may be to dedicate their time, it would mean taking time away from earning their daily bread. The solution? If only they got research funding that would support their development activities. Looking forward to this year, I hope they do. As for my Linux package, by the time I dispatch this article I have vowed to have at least opened the packaging!

The Author

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¹ Larry Ellison (2003) "Changing the game" The Economist: The world in 2004, pg 111

² World Bank Institute, "Electronic Government and Electronic Records: E-Records Readiness and Capacity Building" An Electronic Discussion running from November 19 to December 12, 2003." http://www.worldbank.org/devforum/forum_erecord s-readiness.htm

³ IRMT (2003), "Summary of actions and strategies", Electronic Governance and electronic records: E-records readiness and capacity building, <http://www.irmt.org/evidence/ediscussions/Objectives andStrategies.pdf> 12th December, pg 6

Retention policies are for life, not just for Christmas!

by Mike Marsh, Director, Corporate Archives and RM,
JT-International S.A, Geneva Switzerland



Last Christmas, I watched an advert for a popular European lager that cleverly combined the office party and the then recent scandals. On the ground floor the office party was in full swing, fuelled by the lager, and 'snow' was falling past the windows. Then the camera panned upwards to the Executive Suite, where we saw the Board members merrily (well, it was Christmas) shredding documents and tipping them out of the window, causing an artificial snowstorm!

Back in the real world, Enron and Arthur Andersen had been caught in a blizzard of accusations. They had an approved corporate retention and disposal policy, but admitted that unauthorized premature document destruction had taken place, thus rendering it meaningless.

Out of sight (off-site), or out of their mind?

The Shell oil company was recently accused of concealing evidence of contamination caused by an oil spillage. The Texas-New Mexico Pipeline Company (TNMPC), a subsidiary of Royal Dutch Shell, once had substantial archives including records of the disaster that were scheduled for **permanent** preservation. Rather ironically, TNMPC was sold to Enron and later, EOTT unwittingly bought the 'assets' and the skeletons in the cupboard from the Enron bankruptcy. EOTT then found itself being sued because, many years earlier, TNMPC employees had buried 190 boxes of archived records in the New Mexico desert. Of course, hot dry sand is a good preservation medium and the records weren't destroyed, just concealed. A frightened company had acted unethically to protect itself. Its employees had complied to save their jobs but it was EOTT and Shell who had their reputations tarnished. And, once again, a retention policy was rendered meaningless by being ignored.

A shot in the dark and a smoking gun?

Litigation can require the production in court of millions of documents. The legal discovery process is often a "shot in the dark" netting many documents not directly related to the charges.

There is no doubt, the quicker we can retrieve and produce the records, the fewer other potentially damaging documents will come to light. But even a genuine inability to find and produce records can count against you. E-mail and attachments, even **deleted** ones, may be 'smoking guns' because investigators can use sophisticated software to search your IT file-servers, hard drives, portable IT and audio equipment, diskettes and CDs, electronic archives **and** back-up tapes.

Hackers may breach even high security measures – ask the U.S. Department of Defense, the FBI and CIA. The archives of the tobacco, pharmaceuticals, biological research laboratories, and nuclear industries as well as governments, their advisers, and the 'intelligence' communities, are especially vulnerable because of the sensitive nature of their records. They have the added burden of balancing things like data protection against freedom of information.

Balance and enforcement

In framing policies we must strike a balance between the business, legal, regulatory, and customer requirements; and the need to improve business efficiency, manage the risks, and minimize the associated costs. That requires a corporate team effort, from the basement to the boardroom. But the CEO and executive board must first set and publish their **ethical** policy. The nature of their business will thus dictate their priorities, and will shift the balance either way towards the extremes of 'keep forever' or 'destroy as soon as possible'.

Such policy-making must be transparent and published, but then someone (e.g.: Legal office, Chief Compliance Officer, Internal Audit or the Records Manager) must actively **enforce compliance**. Employee contracts need to be clear and specific on the requirement to comply with policies, and employees must be left in no doubt that they mean what they say.

Above all, senior staff must take ownership and set an example. All too often, as in the Enron case, it is people in a position of authority and trust who breach company rules. It is a sad reflection on those involved, but that is human nature. Who do you think was the most to blame – the executives who sailed too close to the wind, those who ordered the destruction, the archivist who allowed archives to be plundered or the company that failed to enforce policy? Leaving it until the court hearing could be the most expensive option!

The Author

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from concept to reality

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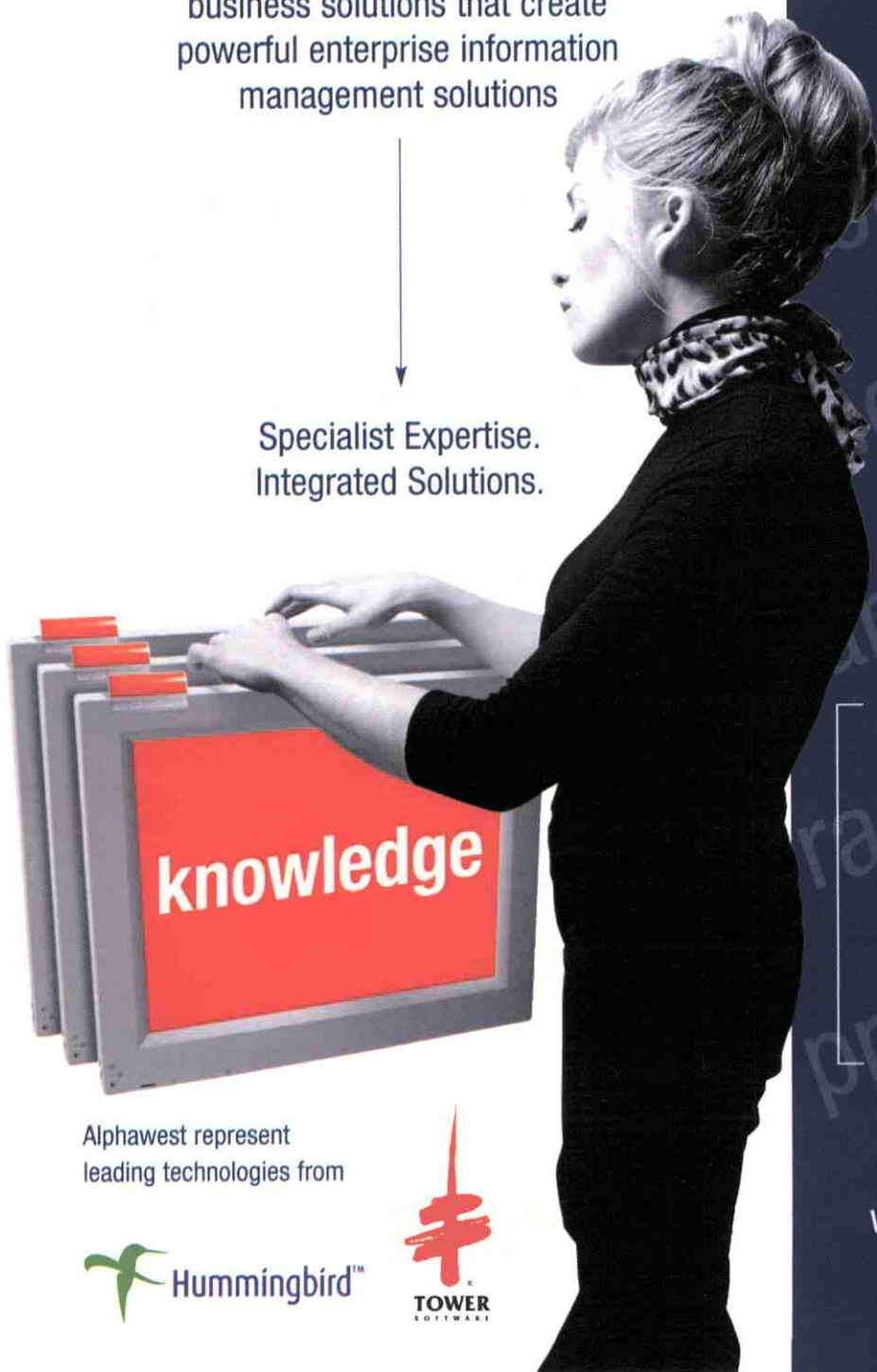
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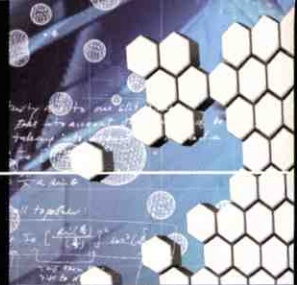


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Matthew Lipscombe B.Eng B.Sc MBA

Prior to founding DocBanq, Matthew provided consulting services in the area of information management strategies for numerous organisations with the Australian Department of Defence.

Until 2000, Matthew was Product Development Manager for CPAP Products at ResMed Ltd, actively managing a multi-disciplinary team to develop and market devices for the treatment of Obstructive Sleep Apnea.

Mario Boutet B.Eng

Educated in Canada, Mario Boutet's career in Australia started with Cochlear Ltd where he worked as a Production Engineering Specialist for 4 years. Cochlear Ltd is the world leader in the design and manufacture of Cochlear implants for the profoundly deaf.

In 1995, he joined ResMed Ltd where he was most recently Product Development Manager for Bi-Level Products which are designed to provide assistance to patients with respiratory insufficiency and Obstructive Sleep Apnea.

From 2000 and prior to founding DocBanq, Mario provided consulting services to the Australian Department of Defence for the management of electronic documents and records.

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Neuromonics (www.neuromonics.com) is commercialising a medical device-based treatment for the medical condition of tinnitus. This condition can be described as the perception of sound when no external sound is present, often referred to as "ringing in the ears".

In the absence of any existing satisfactory treatment, the disorder constitutes a major health problem in the industrialised world, having a debilitating effect on almost 2% of the population. Neuromonics is based in Sydney, Australia.



BUSINESS NEED

Organisations that develop, manufacture and distribute medical devices operate in a highly controlled environment and are subject to the stringent requirements of a number of regulatory bodies.

Fundamental to enabling compliance with these requirements is the tight management of the documents and records that are produced in product development and in the course of doing business.

Electronic Document Management (EDM) systems are software tools that are designed to streamline the document management process and ensure the integrity of the document set for audit. These systems embody concepts such as Version Control, Design History and Security Management, concepts that underpin any document management strategy.

Until DocBanq, the high cost of ownership of EDM systems has made the benefits out of reach for Small-Medium Enterprises (SME) and some larger companies.

"When we first looked at setting up our document management system, we considered doing this in-house using commercially available systems, and quickly came up against the high upfront costs" said Peter Hanley, CEO of Neuromonics. "An in addition to the high upfront costs, we would have needed on an ongoing basis to source - and pay for - a resource with the expertise to manage and maintain the system. Dedicating resources to such non-core activities as maintaining IT systems just didn't seem to make business sense for us". By their nature, biomedical organisations consist of multi-disciplinary teams collaborating on projects from various locations. The ability to access documents and work collaboratively within a controlled environment is crucial.

"For a given project, we might need the ability for contractors working offsite, partners in other organisations, staff members within our premises all to work from the same documents and to do this within a controlled environment" says Dr Hanley.

SOLUTION

Neuromonics uses DocBanq to store and manage their documents from a central repository. Staff members and contractors can then work collaboratively on these documents from multiple sites.

The ownership and maintenance of the hardware and software infrastructure is completely outsourced. This also includes upgrades, system maintenance work, security, data integrity, backup and recovery.

BENEFITS

"The outsourcing model makes a lot of sense for a growing organisation like ours" says Dr Hanley. "Being charged on a usage basis means that the cost of using the system matches our organisation size and level of activity".

An outsourced solution ensures that the overall service delivery follows current best practice in the field of Document & Records Management. "Not only can we now access our documents from any location, but we also benefit from having our documents protected and stored according to current industry best practice. This gives us added confidence that we can continue to meet our legislative and compliance requirements on an ongoing basis" Dr Hanley concluded.

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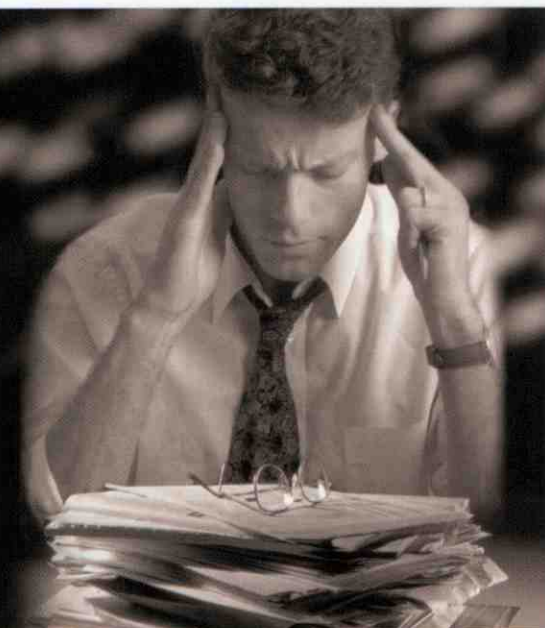
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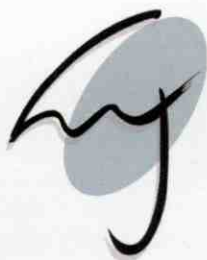
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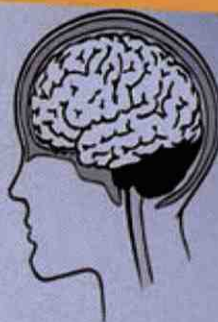
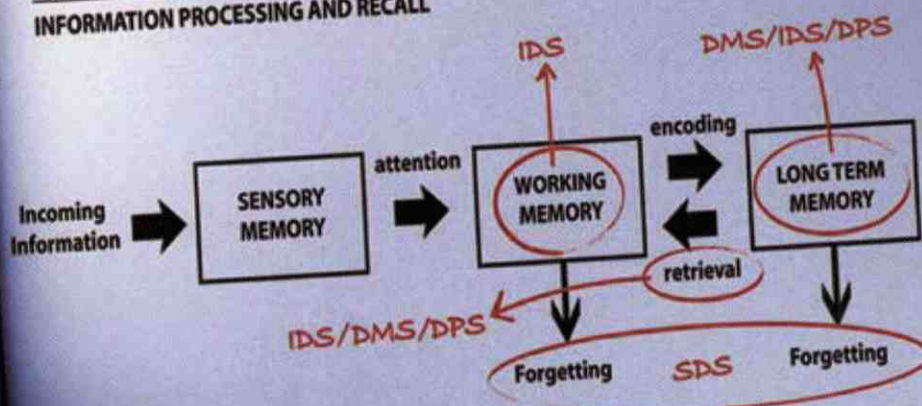


figure 11.a

INFORMATION PROCESSING AND RECALL



Chapter 11: The Brain and Memory Function | 232



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RMAA NEWS

RMAA NEWS

Government agencies must follow Archives guidelines: Cullen

The Deputy Prime Minister, Dr Michael Cullen, has publicly backed the Chief Archivist in upholding the government record disposal functions assigned by the Archives Act.

And, at an end of term function at Archives New Zealand, he hinted that the long-awaited Public Records Bill could be law by the end of 2004.

The Deputy Prime Minister and Minister of Finance told the gathering: "The Archives Act assigns some very important functions to the Chief Archivist, foremost of which is authority over what happens to government records. In short, no agency may destroy a government record unless the Chief Archivist says so."

Dr Cullen was speaking to Archives NZ staff and stakeholders at the institution's December launch of its "General Disposal Authorities" or "GDAs", guidelines setting out procedures for government departments in the destruction or transfer to Archives of their personnel, financial, accounting housekeeping records.

He was firm that evidence of government decisions, "actions or inactions" and dealings with the citizen "must pass the scrutiny of the Chief Archivist before destruction can happen".

He was equally in unequivocal about the institution's new Government recordkeeping programme, Continuum, launched earlier this year. "Each agency must manage its own records, according to guidelines and standards designed and promulgated by Archives."

He went on: "Archives will be working with other agencies to lift record keeping capability across the public service. The three GDAs which are being launched today will be essential products to aid in that process."

Then came his Public Records Bill hint, perhaps more in hope than expectation. Introduction of the Bill was one of the big Parliamentary challenges that still had to be met, he said. "It is necessary to take account of the additional responsibilities of Archives New Zealand both as a department of state and, more generally, as

the agency responsible for the broader government record not just the archival component."

"I am hopeful that when we meet again next Christmas we will be able to celebrate the passage of the new legislation."

N.Z. Recordkeeping Showcase is a sell out: Top names at first RMAA event

Wellington, January 2004

The Recordkeeping Showcase planned for the Archives and Records Week in March is a runaway sell out. The event has attracted 19 exhibitors and 13 presentations, the maximum number possible in the time and space available in Wellington's Town Hall convention centre

The Showcase, on Friday, March 26, will be a highlight of the Archives and Records Week in New Zealand backed by RMAA and the Archives and Records Association of NZ. The event will run throughout the day with the non-stop series of presentations by top high-tech and hardware vendors from across New Zealand and Australia.

Attendance will be by registration and will be free to all comers. Morning and afternoon refreshments and a light lunch will be provided. Registration forms will be available on-line next month and will be widely publicised.

New technology companies large and small from across Australasia have jumped at the opportunity to show off their products at the big event.

Objective Corporation's 6i, Tower's TRIM Context, Hummingbird, Synercon Management's a.k.a, NZ Micrographic's Desktop Imaging, Anuva, Infovision, Codafire, Docbanq and Reliance will be among the high-tech products to be presented at the day-long Showcase and on display at the Exhibition in the Convention Centre's Civic Suite.

The event will cover a wide field of archives and records management with presentations or displays by organizations like archives suppliers, Hydestor, Europlan and Zetta Florence, the

Filecorp Holdings consultancy and the Government Recordkeeping unit of the national Archives New Zealand. The Recordkeeping Showcase is near capacity only four weeks after its launch. The Exhibition area has been extended to meet demand.

President of the New Zealand branch of the RMAA, Helen Hancox, ARMA, who launched the project in November said in Wellington: "Recordkeeping technology has grown hugely in the last few years. This is going to be a superb opportunity for the technologists to show off their processes and systems, and for users to look them all over and make decisions.

"The demand by big players for places at the Showcase illustrates clearly a wish to take advantage of increasingly strong industrial and commercial enterprise in New Zealand. We will be looking at creating an even bigger event in 2005, perhaps involving more than one city venue."

The 2004 event was so popular that the organisers, NZ Branch Councillors Michael Steemson, ARMA, and Trish O'Kane, ARMA, had to hire additional space in the Civic Suite. Michel Steemson said: "I believe we could have sold even more space if it had been available." The Recordkeeping Showcase is modelled on similar, very successful events held in Australia.

The Archives and Records Week 2004, from March 21 to 27, aims to draw attention to the information management professions and their work for stronger management of the knowledge product they facilitate. The week will be filled with seminars and other events in most of the main centres in New Zealand.

NSW to offer Records Management Scholarships

The NSW Branch will award scholarships for Records Management education this year. They will be known as the **Peter A. Smith Scholarships** in recognition of Peter's contribution to the NSW Branch over many years and his special interest in the area of education.

The scholarships will consist of one off payments to assist study and are open to any

resident of New South Wales aged 16 or over who is enrolled in tertiary study in the field of records management. The courses must be a RMAA-recognised university courses or accredited vocational qualifications delivered by an RTO.

\$5000 has been set aside by the Branch for the scholarships and if sufficient applications are received at least one scholarship will be awarded for each of the following categories:

- University students
- Diploma/Advanced Diploma students, and
- Certificate III/IV students.

Applicants are not required to be members of the RMAA but will need to provide the following:

- A short personal statement of approximately 500 words stating why they wish to study the course in which they are enrolled. Applicants will need to indicate what they hope to achieve

by completing the course, their personal motivation for the study and how they think it might contribute to their future plans and career.

- A Curriculum Vitae, including details of any relevant work, voluntary or other experiences, and/or other information about their background which may be relevant
- Proof of enrolment in a recognised university course or an accredited records management vocational qualification.
- The names of two referees.

The judging panel is to consist of the Dean of Humanities and Social Sciences at UTS, **Joyce Kirk**, and two NSW Branch Councillors, **Greg Brace** and **Stephen Smith**. The final amount awarded to each of the successful applicants will depend upon the number of applications received in each category.

Applications will close on 1 March 2004. Further information and an application form are available on the RMAA website. Additional

inquiries may be directed to Stephen Smith, Chair, NSW Education Committee, on 9561 8823 or by email on Stephen.Smith3@det.nsw.edu.au.

The inaugural scholarships presentation will take place during ARM Week in May 2004.

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INDUSTRY NEWS

VET Qualifications for the records management profession

Vocational education and training (VET) courses have risen in significance and prevalence over the last five years, leading the charge in responsive and flexible training options for working professionals. By the end of 2002, over 1.7 million students were enrolled in VET courses across public and private training colleges around Australia.

Vocational qualifications are delivered through a competency based process, whereby training and assessment is workplace based, focusing on meeting industry required standards, and students are deemed competent as they demonstrate they are able to perform in their workplace to this required standard.

While VET qualifications have traditionally been regarded as technical qualifications, **the restructuring of the VET system through the 1990's has seen a larger focus on higher level qualification areas, and a broader theory knowledge base incorporated into qualifications.**

In 2002, over 30 000 University graduates had enrolled in TAFE NSW alone¹, seeking additional VET qualifications to take advantage of a broad range of features in the new VET system. Students enrol in VET qualifications for a variety of reasons, including:

- to improve their employability
- to assist in transferring theoretical understanding to the workplace environment
- to access further flexible professional development opportunities
- to maintain the currency of their workplace skills and knowledge
- to overcome real workplace issues and needs
- to support transitions into new workplace roles/positions

With the release of the Business Services Training Package in late 2001, national competency standards and associated VET qualifications for the records management profession became available for both technical and professional roles within the recordkeeping industry.

While the recordkeeping competency standards

were developed from reviewed earlier versions developed in 1996, these standards represent the first time national training package qualifications have been available to records professionals.

There are four qualification levels available in the recordkeeping area:

- Certificate III in Business (Recordkeeping)
- Certificate IV in Business (Recordkeeping)
- Diploma of Business (Recordkeeping)
- Advanced Diploma of Business (Recordkeeping)

The certificate level recordkeeping qualifications are relevant for technical records management officers, where records are used, maintained and reviewed with a supervisory focus.

The diploma and advanced diploma level recordkeeping qualifications are relevant for the records management professional, involving the setup and review of complex records management systems, and managerial responsibility for the planning and implementation of records frameworks and staffing.

All units within these qualifications have been directly aligned to the international records management standards ISO 15489, ensuring they are relevant to the latest quality standards in records management processes and practices.

The VET qualifications have been designed to be complimentary to other educational programs including university degrees. As evidenced above, many university graduates enrol in VET qualifications to assist their transition into the workplace environment. Alternatively, VET students may complete diploma level qualifications as a pathway into University degrees, applying to Universities for credit articulation on a **case by case** basis. Commonwealth government guidelines suggest up to one year's credit from a relevant diploma qualification into a three year degree.

A range of public and private training colleges are now offering the recordkeeping qualifications at all levels. Training options include seminar based training courses, self paced distance education, on-the-job training

pathways, e-learning courses and recognition of prior learning (RPL) options for experienced students. When considering a VET qualification, you should match the flexible training pathway to your lifestyle and commitments, to ensure you find a study program that will best meet your needs.

When comparing and selecting a training provider, you should consider four key criteria:

1. Training pathways/options available to suit your needs
2. Support systems available for access to qualified tutors
3. Accreditations held by the training provider (eg ISO, Government Endorsed Supplier, RMAA, etc)
4. Course costs

When next considering your professional development needs, don't overlook completing a VET course or full qualification – they achieve results in reflecting on and reviewing individual and workplace practice.

Phill Bevan
Operations Manager
Esset Australia

Esset Australia, a fully accredited training college, has recently achieved RMAA accreditation for its Recordkeeping qualifications. For more information, contact Esset Australia on 1300 558 936 or visit the records management toolbox site at:

<http://www.esset.com.au/rmt>

¹ Australian National Training Authority (ANTA), 2003, Australian Training Magazine, June 2003 edition.

Archives New Zealand appoints Māori Manager



Archives New Zealand has appointed its first Kaiārahi (Māori Manager), the North Auckland consultant **Hinerangi Himiona**. Chief Archivist **Dianne Macaskill** welcomed her, saying: "This appointment is very important to us. We had to be sure we got someone who could combine an understanding of Māori culture and traditions with an understanding of the concerns and issues relating to archives."

Hinerangi was raised by her grandparents in the Bay of Islands, and by her parents in Auckland. She attended Turakina Māori Girls College and Auckland Girls Grammar before starting a degree in Māori Law and Philosophy at Te Wānanga O Raukawa in Otaki.

She was diverted from that by an interest in preserving the past that had been fostered by her grandmother, who was the first Māori liaison officer for the New Zealand National Library in the late 1980s.

"She had always encouraged in me an interest in old things, information and history. I decided to do the Certificate in Archives Management course which was being run in Masterton," Hinerangi said.

The course took a year and included visits to Wellington institutions as well as two weeks of internships that Hinerangi did at the Alexander Turnbull Library and at the University of Auckland Māori Manuscripts Library, Te Hukātai.

Hinerangi was one of only two Māori to graduate from the course, and when she finished she went on to a position as the Māori Manuscripts Librarian with Te Hukātai.

"That was a great job – I created catalogues and finding aids to make all these great resources more available to Māori people. I travelled around the country and surveyed Māori material in other public archives collections and got to see the services they provided."

During this time Hinerangi also fitted in starting a family, doing some more study, was involved with the development of the Indigenous Librarians' Forum and started helping out iwi throughout the country who needed advice about looking after their own taonga.

"The Waitangi claims process has meant lots of research and resurrecting of histories. Lots of paper is being created and old paper records are being discovered. It's important that these records are kept properly and people need help to find ways to store and manage it so it is safe."

In the end this advisory work started to take over, so Hinerangi left her Auckland University job to be more available to assist Māori groups.

Over the next five years, she worked with Ngati Kuri people in Kaikoura helping them develop their hapu archives with policies, training and help with application for funds for appropriate storage. Hinerangi worked as part of a team of people, including paper conservator **Vicki-Anne Heikell**, textiles conservator **Rangi Te Kanawa**, objects conservator **Nick Tupara** and **Hinuerina Mangan** and **Rangiiria Hedley** both Māori Liaison librarians for the National Library, holding workshops, visiting marae and giving advice to local communities on the storage and protection of taonga.

This work has also seen her helping develop standards and models for marae-based repositories – ranging from the basic guidelines through to the requirements for a dream repository.

"One of the interesting things we have been looking at there is the possibilities of using earth building as an option for repositories."

She was also involved with Te Wānanga o Raukawa in the foundation work to establish a tertiary level course on managing Māori information.

"Some of the questions we had to think about were how do you put this information into a Māori framework? What is a source of information, in Māori terms – for example how do you include the information held by kaumātua (elders), or that's inherent in waiata (song)? How do you store that sort of information and how do you make it accessible?"

Then, last year, she was asked to help Archives New Zealand develop its Access Standard and from there moved into becoming part of the Archives' Māori consultative group and taking on a contract position helping prepare the ground for the Kaiārahi position.

It was the experience she gained from that job that persuaded her to apply for the position herself.

"At first I wasn't going to – I thought the place and the job were both a little scary, but after working here I got to see how it works and I got to know some of the people. Plus this is a great opportunity to bring together the aspirations of Māori and Archives New Zealand and the wider archives community. It's a great chance to introduce and develop a Māori perspective which I think is very important both for the Māori community and for Archives New Zealand."

"Issues around the creation, ownership, management, dissemination and preservation of Māori information and particularly Māori heritage information are often overlooked in the face of seemingly more important issues such as health, education, employment etc. Māori need to be connected to our heritage. We need to know our history, who we are and who we come from. So many Māori are disconnected from what is rightfully theirs, and these things are essential to positive, functional development. I am excited to be doing this mahi."

Hinerangi is convening a special seminar at Archives N.Z. on Māori recordkeeping for the New Zealand Archives and Records Week in March organised by RMAA N.Z. and the Archives and Records Association of NZ (ARANZ).



Chris Fripp

Professional Status:

MRMA MAICD AMIM AdvDipBus(Rkg)

Director Portfolio:

Governance & Ethics (Also National President)

Branch Represented:

NSW

Current positions on Branch:

Treasurer and Director

Years involved in RMAA:

18 years and have held the following positions:

National President 1999 - present

President of the NSW Local Government Chapter 1995 - 2000

President NSW Branch 1991 - 1994

National Director 1989 - 1994, 1998 - present

Federal Treasurer 1994

Federal Secretary 1992 - 1993

Company Secretary 1997 - 1999

Chairman, Special Projects Committee 1986 - 1989

Secretary NSW Branch 1989-1991

Treasurer NSW Branch 1991/1992, 1998 - present

Chair Federal Membership and Status Committee 1998 - 2000

Current job & Company:

Corporate Records and Archives Manager

Sutherland Shire Council - since 1995

Responsible for the provision of strategic advice on records management policy, standards and statutory interpretation, including the coordination of physical and electronic records, archives, information and knowledge of the Council. Responsible for 17 staff.

Passions

Training, competencies, professional development and being part of a progressive and professional Association. Personal passions include chocolate and ice-cream.

Dislikes

Unhappy members, oysters and pumpkin.

Personal Comment

I have found my time on the Board very fulfilling and have been glad to be part of a progressive Association. I would recommend that all members get involved with their Association at various levels and take advantage of all the learning and professional development opportunities.



Helen Hancox

Professional Status:

ARMA

Director Portfolio

Strategic Alliances

Branch Represented

New Zealand

Current positions on Branch

President

Years involved in RMAA

1.5

Current job & Company

Top of the Pecking Order, the Flying Filing Squad

Passions

Fun, business and philanthropy. I chair the Women's Loan Fund in Wellington and we lend small amounts of money to women.

Dislikes

Gardening, housework and rap music.

Personal Comment

I personally believe that it is important to have balance in my life and to give to the community that I live in. When I started my business in 1989, a variety of people assisted me. I work with the Women's Loan Fund to assist other women restructure debt or take their business past the embryonic stage.

Directors



Lynnette Kickett

Professional Status :

ARMA

Director Portfolio:

Professional Development

Branch Represented:

NT

Current positions on Branch:

Branch Secretary + NT Board Member

Years involved in RMAA:

Ingural Committee Member NT 1986

1986 – 1989 (I think) as Committee Member & Associate Member NT

1995 - Associate Member - WA

1999 - to Date - Associate Member NT

Current job & Company :

Corporate Records Manager

Information Governance

Power Water Corporation

Passions :

Being Organised

Family and Friends

Aussie Rules or any sport at elite level

Fishing for the Barra or Snapper

Sitting on the beach watching the sun go down

Camping anywhere in the hotel of a million stars

Curried Chicken and Rice

Dislikes:

Rude and Selfish People

Drivers who think females aren't capable of driving a 4 x 4

Personal comment:

Being involved in this industry, for the challenges, changes and the commitment of the interesting and different people I have been fortunate enough to cross paths with. The challenge of the history of the corporate knowledge of an organisation, the research and relating it, to a controlled and systematic interpretation provides the greatest job satisfaction.

If I have the ability to make positive changes within any organisation's corporate records management units, that provides greater understanding by the decision makers present and future. That we are just not the filing clerks, that there is no quick fix solution within our business, that in fact we are the knowledge managers of the organisation. Invest in our skills and they shall seek the rewards, then I feel I have achieved my goals.



Kemal Hasandedic

Professional Status:

MRMA

Director Portfolio:

Standards and Legislation

Branch Represented:

Queensland the Knowledge State

Current positions on Branch:

Councillor, President Local Government Chapter

Years involved in RMAA:

1996

Current job & Company:

Records Manager Thuringowa City Council

Passions:

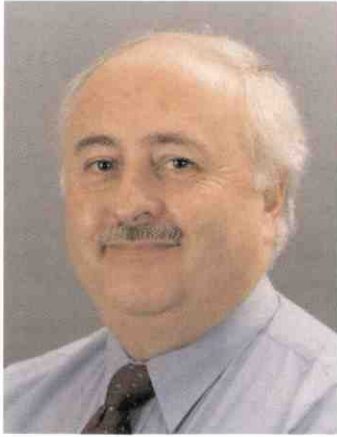
Recognition of Records Management as a Profession and that it provides value to an organisation.

Dislikes:

I dislike the IT industry pushing supposed systems that will fix the needs of organisations and their slick salesman who sell to CEO's or the IT/IS manager a recordkeeping system. Which is deficient and the user or person responsible for implementing the system never had a chance to say boo about what the system needed to have to assist the organisation meet its recordkeeping and business related requirements.

Personal comment:

Don't judge the book by its cover or you will likely be sorely disappointed by its contents.



Thomas Kaufhold

Professional Status:

Associate

Director Portfolio:

Finance and Economics

Branch Represented:

ACT

Current positions on Branch:

Board Member, Branch Treasurer, 21st International Convention
Committee Member (Convention Treasurer)

Years involved in RMAA:

28

Current job & Company:

Manager, Administrative Support Unit (includes Records Management)

Passions

Good records management and life in general



Kristen Keley

Professional Status:

Associate

Director Portfolio:

Marketing (also National Vice President)

Branch Represented:

South Australia

Current positions on Branch:

Branch President
Membership and Status Co-ordinator

Years involved in RMAA:

Branch Council since 1994
Board since 1996

Current job & Company:

Records Management Co-ordinator
WorkCover Corporation

Passions

The RMAA, my family, shopping and when I get time my craft related hobbies

Dislikes

Mangos, peppermint, people who don't follow through and timewasters

Personal Comment

I believe in the RMAA and its' strategic direction. The Board has worked hard towards realising its' goals for the Association and I am proud to be part of it, despite the workload that this entails. I hold great respect for the members of the Board, the Branch Councils and other volunteers, for making the Association what it is today and look forward to helping shape it into what it will be in the future.

Governance and Ethics Directorate

There have been a few recent issues suggesting that the recent emphasis on corporate governance and corporate behaviour has yet to run its course. Conformance to corporate governance and financial performance are not mutually exclusive. They are the two vital ingredients of corporate success and good corporate governance behaviour does beneficially impact on financial performance and member decisions.

The National Board is a strong advocate of ensuring good corporate governance and as such have endorsed several policies at the December 2003 Board Meeting.

Copies of these will be provided on the Members' Only site in due course, however, a summary of these include:

Annual Agenda:

The annual agenda contains items that the board may wish to plan to spread its workload across the year and to provide time for focused analyses and discussion.

Board of Directors' Charter:

The role of the National Board is set out within the Constitution, however, further authority to manage the business and affairs of the RMAA was undertaken in relation to stewardship responsibilities of Board, Management, Strategy, Risk Management, Capital Management and Internal Control, Material Transactions, Financial Reporting and Communication.

Carrying out Due Diligence Prior to Joining the Board:

Joining a board can and should be a positive and rewarding experience, but it also brings with it some risks. It is imperative that prior to joining the Board, a prospective Director carries out their own due diligence process to gather as much information about the board, its processes, commitments and its members as can be reasonably gained. (This is to form part of an "Information Package" that will be provided to interested parties.)

The Challenge of Chairing the Board:

If there is one concept that is universally associated with the board's role, it is "leadership". Above all else, the role of a governing body is to provide leadership to the organisation. Within this role rests a myriad of

interrelated leadership functions which, when enacted in an orderly and systematic manner, combine to protect and enhance the owners' interests.

The National Board is also a strong advocate of educating its Directors and wants to ensure that this is undertaken on a regular and acceptable basis. Continuing education is required in all great professions – why should Directors' be different.

As Members would no doubt agree, the need for better communication between Directors and the Members of the Association has been a regular topic. The Board hopes that with the introduction of e-communities (a two-way communication mechanism) on the website, this will give Members a chance to communicate on a regular basis rather than once a year at the Annual General Meeting.

Corporate governance is something that needs constant work and that even accepted structures and arrangements need to be looked at through the prism of today's corporate governance expectations. The RMAA National Board is determined to work towards continual improvement in relation to Corporate Governance and I look forward to informing you of our continued progression.

Chris Fripp, MRMA
Director, Governance and Ethics

Strategic Alliances: Gaining access to new markets and opportunities

The Board is considering whether it would benefit RMAA members to develop strategic alliances with other organizations. We are interested to know what you think. In the past we have made formal alliances with the Australian Society of Archivists (ASA) and the Institute of Information Management (IIM).

As a membership-based organization, we do need to consider whether we need them and what sort of benefits they could bring to members. **Peter de Jager**, in his article "Technobility: Loss of Association" (*Computerworld*, 17 November, 2003) laments:

"In nearly every industry there's a growing and disturbing trend. The lack of time, dwindling resources and a growing desire to protect personal time from the incursion of business are all conspiring to bring about the demise of the professional association. Membership numbers, conference attendance and willingness to participate on boards and in meetings are all on the decline."

His comments are pertinent to the whole idea of Strategic Alliances. Such alliances can strengthen the individual associations; alternatively, they may lead to a merging of associations.

Kate Walker, RMAA Executive Officer, has also done some thinking on the topic. She notes that alliances

- have become more common in the voluntary sector
- typically involve organizations collaborating to achieve a result which can be achieved more efficiently than if done independently
- can be an arrangement ranging from an informal collaboration to a merger

She adds that changing economic and social realities combined with stiffer competition for funding and resources have caused many organizations to re-examine the manner in which they finance and implement programming. Her research indicates that there are four typical models:

1. **Administrative Alliances:** Generally involve one organization entering into an agreement with another for the provision of administrative services, space or products. The main purpose is to share functions, increase operational efficiency and to reduce costs

2. **Service Organizations:** Organizations establish a new and separate entity with the intent of providing shared services to both the founding organizations and, potentially, to others. Typical examples would be fundraising, accounting, personnel services and procurement. Because it is a separate entity it may effectively insulate participants from direct liabilities.

3. **Joint Programming Alliances:** Organizations which form an alliance for the purpose of delivering a joint program, taking advantage of different skills and abilities in an effective manner. Typical matters to be considered in an agreement providing for a Joint Programming Alliance would be:

- Establishing and defining the nature, type and level of contributions
- Governance – consideration of some form of joint advisory council if not to be a separate entity. If a new entity is to be established matters that must be addressed include Board representation and the removal of unwanted Board members; the meetings conduct, quorum and so on

- Intellectual Property – must clearly agree and define what intellectual property will be owned by each party; what intellectual property will be used by the new entity and proper requirements to licence its use

4. **Merger:** The amalgamation or joining together of two or more organizations that share similar objects, goals, principals and/or programming. This process often results in the dissolution of one or more of the merging organizations.

Period of consultation

If a strategic alliance is to work, there must be a period of consultation before the agreement. The consultation period will assist the parties to appreciate and understand the implications of an alliance. Each party would undertake a detailed program of due diligence in order to examine

the operations, finances, board governance, and other matters involving all parties to the agreement

If a strategic alliance is to proceed, it is critical from the outset that the parties understand the agreement; the agreement is well documented; and the agreement establishes the terms of the relationship going forward. Key Elements of a typical alliance agreement include

- Expenses – a proper defining of the expenses to be shared;
- Personnel – who will be the employer;
- Leasing of Space – who will lease and who will sublease to the other;
- Fundraising – if joint fundraising is contemplated must define the fundraising process and establish a proper accounting of all funding;
- Proceeds;
- Books and records – to be maintained jointly or separately; and
- Dispute Resolution – how to argue successfully.

What do I want you to do?

So, what do I want from you, dear RMAA member? Your opinion, please, on what you think about the RMAA actively pursuing strategic alliances. Is it something that you would like the National Board to focus on? If so, what organizations do you suggest we approach? Should we merge with these, or just stand together? What value could the other organizations bring to RMAA and what improvements might they achieve for themselves and us? All comments gratefully received and in confidence, of course. Please contact me at helen.hancox@xtra.co.nz.

Helen Hancox, ARMA,
Director, Strategic Alliances,
President, NZ Branch.

Marketing Director's Report

I am pleased to be able to provide you with a brief overview of what has been happening over the past few months and what we are planning for the future.

Anniversaries

The RMAA are celebrating two anniversaries this year. First the RMAA will be 35 years old next month and second the InfoRMAA Quarterly will celebrate its 20th year later this year.

Christmas Cards 2003

I hope all of our Professional members received their Christmas card personally signed by our esteemed President, Chris Fripp. This year we will be introducing an electronic Christmas card.

Corporate Membership Certificates

I am pleased to announce that we will be re-introducing Membership Certificates for our Corporate Members in 2004/2005 due to popular request.

Conventions

The RMAA has been holding annual Conventions for 20 years with each branch hosting a convention on a roster basis. This has always been successful and will continue to be performed in this manner, however the Board has decided that since the annual Convention is an RMAA event hosted by a branch, as opposed to a branch event, the Board should take a more active role. Those who have not been involved in hosting a Convention may not be aware that it takes two to three years of planning to put a Convention together. To assist in this process the Convention By Laws have been re-written, Convention Operating Guidelines are being drafted and a Board representative (the Director of Marketing) is now available to provide advice to each host Branch, ensure continuity and assist to resolve any difficulties. By no means does this take away the local contribution or flavour of the Convention - it is merely an overseeing and support role. I can happily report that the 2004 Canberra Convention, 2005 Perth Convention and 2006 Queensland Convention are all well into their various planning stages. I can also report that the Board has agreed to hold the 2007 Convention in Wellington, New Zealand. Get your diaries out and start planning.

Promotional Items for sale

There are a range of promotional items and speakers gifts for sale, the order form is available on the website and samples are available to view in each Branch. We are also working towards introducing online ordering and payment in the near future.

Marketing Plan

A marketing plan workshop was held at the December Board meeting with several positive outcomes, including:

^a Redefining who is our customer and what do they expect from us

- A 'generic' poster that can be used to promote any RMAA event. It will be A2 size and will have a blank section at the bottom where details can be added as required

- RMAA presence at Career Days: Most states have a career day for high school students, it is hoped that by having a display, reaching them early and targeting the information to suit them, we may influence their career choices and introduce records management as a legitimate career option

- 2004 is the last year for ARM (Archives & Records Management) Week. Its theme will be "Records Management as a Career" and it will be held in the last week of May (except in New Zealand where it will be held in March)

- From 2005 we will be introducing I AM (Information Awareness Month) which will encompass all streams of information. The theme for 2005 will be "Personal Records" and will concentrate on introducing the idea that even householders manage records.

Kristen Keley, ARMA, Director, Marketing

Professional Development Directorate

I am far too inexperienced in this portfolio to write what you may want to hear, so this paper contains my thoughts as to events that have unfolded around me since taking on the portfolio for the first time.

During the National Board Meeting in September 2000, and in line with the changes to the responsibility of Board Directors, I was asked to select the portfolio in which I felt I could contribute to the best as well as to indicate my passion.. My initial reaction was: "Hell, what do I know about any of these portfolios at a higher level?"

Education, Marketing, Governance and Ethics, Economics and Finance, Strategic Alliances, Standards and Legislation, e-Business, Professional Development, Portfolios loomed at me from the whiteboard - not a great deal of area where I have had a lot of experience apart from what I needed for my own cause. Having a two way conversation between my conscious and subconscious, and staring at the white board for what seemed hours, Professional Development chose me. Well, that's how I like to think it happened!

Now, I have to be responsible for implementing events to happen at the national level. All a bit scary.

My energies from September 2003 to December 2003 have been focused specifically back on the NT Branch trying to lift its profile, and to this point I felt that I had achieved zero at the national level.

Contemplating the situation I now faced on the plane home from the December 2003 Board Meeting, where a lot of ground work on portfolios emerged, my positive thinking began running amok. I began to realise that I really did have what it takes to do this and having unlimited support from other directors and the Executive Officer and the Board, made me feel a little easier.

I began assessing what I knew up to this point in time. On researching the web page for the Branches, I found every branch was heavily involved in providing members with various events, from seminars, workshops, breakfast and luncheons, arranging guest speakers and doing all the hard yakka at Branch level.

Taking into account what Branches were providing, I needed to realistically plan what was achievable for 2004, and the following points were of concern.

- What kind of events could be coordinated at the national level?
- Who was going to facilitate the events or did this mean adding more time to the already heavy volunteer input?
- Would members participate?

As part of the national strategy for professional development, the Board decided to undertake a road show on the Competency Standards for members in 2004. So this is my first targeted area.

Proposed dates for this will be negotiated with Branches. Members will be advised of those dates in due course.

The competency standards, developed in 1997, have been reviewed for inclusion in the Business Services Training Package and have been aligned to the International Standards for Recordkeeping.

Finalisation of the topic's for this road show are still being considered, but may include the following.

- Introduction
- Qualifications Framework
- Common Business Competencies
- Qualifications Guide
- Assessment Guidelines
- Recordkeeping Competency Standards
- Practical Use of Competency
- Recruitment and Induction

So with one professional development program evolving I looked at where else is professional development raising its head? We are very fortunate already to have in place an annual event, currently called ARM Week, and I see this as one of our greatest assets for the promotion of professional development across the Australasia and the world in general. With the coordination of functions and events through state seminars, open days, social events and networking opportunities, particularly with people who speak our language, we should take

the opportunity by marketing at the national level throughout this week.

We have the potential to broaden our membership particularly in our big week. Events being considered by branches across Australasia include, breakfast, luncheons, formal and informal dinners, with guest speakers and games, workshops, seminars, excursions just to name a few.

Most Branches already have plans in place for ARM week 2004, however, where possible we would like Branches to try and work to the theme "Records Management as a Career". I will be sending some information out to Branches via e-mail to try and assist in developing the week if necessary.

All Branches are working towards openly promoting professional development within our industry. Conducting courses, seminars and workshops on interesting and varied subjects has achieved more than the minimal requirement. Well done to all those involved, for without your hard work we wouldn't be in achieving our goals.

I look forward to working with all Branches and the Board in the next year, to ultimately achieve a more coordinated role for professional development.

Lyn Kickett, ARMA
Director, Professional Development.

BRANCH REPORTS

NSW

In my last report I mentioned that I was to be in Singapore in early October. While there I presented two papers at a records management seminar for government employees and a number of people from Government corporations. It was good to be able to share with them.

Our Christmas Party was held in early December at the Hyde Park Barracks Café where around 60 people gathered and enjoyed themselves heartily. Christmas is a very busy time of the year with social events and planning for holidays. Thanks to our major sponsors Hummingbird Australia and Zenith Management Services, and also to all our table sponsors (Tower, Siller Systems, Synercon, Recordkeeping Innovation, Alphawest, and One Umbrella). Also thanks to Chris Colwell and David Pallot for organising the event.

2004 is shaping up well for NSW with a program nearly finalised for the year with a seminar in early February with Fuji Xerox, a member's meeting in early April on ethical issues for records managers. Archives and Records Management Week is shaping up as well for late May.

Our Council is working well with sharing the responsibility for organising events under the guidance of Joy Siller.

Elsewhere in this issue is an announcement of the Peter A Smith Scholarship. Development of this award has taken us some considerable time and I thank Stephen Smith for his commitment to the project. I also thank Stephen, Greg Brace and Joyce Kirk for agreeing to take on the responsibility of the committee responsibility for its award.

I trust 2004 is good to you and our paths may well cross somewhere, sometime.

Geoff Smith ARMA

Branch President NSW

NT

Our Christmas function attended by 25 members was the last for 2003. A great time was had and some new networks were established. Some lucky members who are now proud owners of the some RMAA marketing items won door prizes.

The NT Branch is gearing up for a very busy year in 2004. Our small committee is working actively to achieve our goals set and the majority will come within the first half of the year.

These include lunch time workshops and seminars. For Archives and Records week in the last week of May negotiations are planned for the coordination with archive services, information management and records management professionals to come together and celebrate. Our major event will be a formal dinner with guest speaker media personality Ms Megabyte. More details regarding this function will be posted on the website early in 2004. Contact person for this function is Marlene Hewitt at marlene.hewitt@atsis.gov.au

Lunch time workshops with guest speakers from archives, information and records management and a possible fun excursion to the Museum and Art Gallery of the NT. In July we will have our AGM and our committee hopes to be welcoming new members to the Branch.

A new initiative for Northern Territory will be our participation and representation in youth Careers Week late in August targeting potential candidates pursuing careers in archives, information and records management.

Our branch is also encouraging members to attend the annual conference in Canberra in 2004, "From Concepts to Reality"

Our membership is slowly increasing. A few are considering upgrading their status, which is great for the branch. We welcome **Barry Garside** back to the Territory and extend our welcome to **Lauren Thompson** who joins us from Victoria.

My thanks and appreciation to our committee for their contributions, hard work and dedication shown during 2003.

Pat Parry-Jones
President , NT Branch

Well what a year we are having. Since the elections in July 2003 we have seen a flurry of activity at both Branch and Board level.

The year has seen Victoria hosting one of the most successful National Conventions that the RMAA has run since its inception. Those of you who attended will, I am sure, agree that the Crown Casino venue was a great meeting and networking forum for this event. (For those that didn't make it, be sure that you are at the next one).

Of course, events such as these don't just happen and it would be remiss of me if I did not mention the hard work put in by the Victoria convenors, organising committee and, for that matter, the entire Branch Council and National Board. Although there were many that contributed to this event, I would especially like to thank **Anne Cornish**, now resting in sunny Queensland, and **Peter Gaca** for their untiring efforts. Well done, guys!!

Local Chapter Branch

As always, our Local Government Chapter has been setting the pace for the rest of the Branch. During October, the Chapter ran a very successful meeting at the City of Greater Bendigo. A presentation on ISO15489 (Records Management) was delivered. It is anticipated that a number of other sessions and presentations will be offered in our regional centres over the coming months, so stay tuned.

Rupert Hamer Awards

On the December 11, we held the Sir Rupert Hamer Records Management Awards 2003. This event was run in conjunction with the ASA and the PRO Victoria and jointly we celebrated our Branch Christmas party. However, not to lose focus on the primary reason for meeting the following is the list of award winners that were announced on the day:

- Inner Budget Agency:
 - Award for Excellence - **The County Court**
 - Commendation - The Department of Education and Training
- Outer Budget Agency:
 - Award for Excellence - **The Metropolitan Fire and Emergency Services Board**
 - Commendation - Chisholm Institute of TAFE

- Local Government Agency:
 - Award for Excellence - **City of Port Phillip**
 - Commendation - Shire of Mornington Peninsular
- Small Agency Category:
 - Award for Excellence - **Koorie Heritage Trust.**
- Rural And Regional Agency:
 - Award for Excellence - **Goulburn Murray Rural Water Authority.**

Branch Council changes

From a council perspective we have had a number of changes since the beginning of the year. We started the year with the return of Peter Gaca as both our President and National Board representative. Faced with growing pressure at his place of employment (currently going through a merger), Peter has reluctantly had to stand down from both positions (elections for National Board representative will be held at the next council meeting). However, on the up-side it appears that we may have a number of past councillors returning to the ranks (who these are will be revealed in good time).

Coming events

High on our agenda in the coming months is the Victorian State Seminar. Planning is currently underway for this major event, possibly as a joint function with the ASA. It is anticipated that early 2004 is a suitable time and that one of our central regional centres will make an ideal forum for this event. In accordance with previous years the council has set out a Business Plan for 2003/04. Some projected activities are in the development stages and most have been completed.

David Moldrich, FRMA.
President, Victorian Branch

Convention 2007

New Zealand Branch is delighted and excited that the National Board has approved our bid to hold the 24th National Convention in Wellington in 2007. It will be the first Convention to be held outside Australia.

During December's Board meeting, also the first held in Wellington, Directors were shown through the extensive Wellington Convention Centre, an amalgamation the capital city's handsome, Edwardian Town Hall and its next-door ultra-modern concert hall, the Michael Fowler Centre, in the central city, close to the entertainment and theatre Courtenay quarter.

A steering committee has been set up and planning is beginning. It will be not just a convention but an **Event**. So, start saving your pennies and work on your boss to make sure you can come to Wellington, New Zealand, in September 2007. Plan a holiday around your visit, too. We're organising special tourism deals to go with the event. We will be supplying dates and more news throughout the year.

ARM Week, March 2004

Planning is well on the way for this, our second A & R Week since we opened. The Archives and Records Association of NZ (ARANZ) is joining in with its own events and there are many highlights, including:

- The Recordkeeping Showcase 2004. It will be free to registered delegates. We have a full nine-hour programme of vendor presentations and so many companies want to take part that we have had to hire more exhibition space:

- Maps Seminar

- Maori Recordkeeping Seminar organised by Archives N.Z.'s Maori Manager (**Kaiārahi**), Ms **Hinerangi Himiona**, and

- other events in Auckland, Wellington and Dunedin still in the planning stage.

Branch Councillor portfolios

I have assigned some of the Board portfolios to Branch Councillors. We see this allocation of tasks as a way to ensure that all bases are covered when it comes to promoting the RMAA in New Zealand. The posts filled, so far, are:

- **E-business:** Councillor **Matt O'Mara**, ARMA, Records Manager, Archives New Zealand, Wellington.

- **Finance:** Branch Treasurer **Christine Edney**, ARMA, RM Advisor, Intellectual Property Office, Ministry of Economic Development, Lower Hutt.

- **Education:** Branch Vice-President **Micky Stevens**, ARMA, Records Officer, Inland Revenue Department and Councillor **Gillian Ratcliffe**, ARMA, Land Transport Safety Authority, Wellington

- **Governance & Ethics:** Auckland Chapter President, **David Pryde**, ARMA, Information Analyst, North Shore City Council, Auckland.

- **Marketing:** Auckland Chapter Vice-President, **Vera Giles**, ARMA, Manager, Information Consultancy, Filecorp Holdings Ltd, Auckland, and Councillor **Mike Steemson**, ARMA, Principal, The Caldeson Consultancy, Wellington.

- **Professional Development:** Councillors **Deirdre Wogan**, ARMA, records and archives management consultant, and **Trish O'Kane**, ARMA, Director, SWIM Ltd, Wellington.

- **Standards & Legislation:** Branch Secretary **Alison Midwinter**, ARMA, Senior Archives Analyst, Government Recordkeeping, Archives N.Z., Wellington.

- **Strategic Alliances:** Branch President, **Helen Hancox**, ARMA, Top of the Pecking Order, Flying Filing Squad Ltd, Wellington.

Auckland Chapter

New Zealanders who presented paper at Melbourne's excellent National Convention in September took themselves off to Auckland to present their papers to the Auckland Chapter. Thirty or so people attended, a great way to promote the benefits of membership of the RMAA. We even managed to put in a word about how much fun it is to be a Branch Councillor.

The Chapter, lead by Queenslander **David Pryde**, has published its first newsletter and run a number of well-attended members' meetings.

Informaa NZ

Editorship of our exciting e-zine, **Informaa NZ** (the last edition ran to a bumper 15 pages, see the NZ Branch pages on the RMAA website), has shifted to Auckland for a while as the editor, **Kerri Siatiras**, enjoys her new son, Michael Christopher, born two days before Christmas. Auckland chapter Vice-President **Vera Giles** is running the magazine, meantime. If you have anything to say to or about NZ Branch, please email Vera at verag@filecorp.co.nz.

Monthly Events

The up and coming members' events in Wellington include a half-day seminar on the new N.Z. Electronic Transactions Act, an up-date on the N.Z. e-Government programme, and presentations from Wellington City Archivist, Joanne Newman, MRMA, Trish O'Kane, Matt O'Mara and New Zealand National Library Preservation Officer, Jocelyn Cuming. Our annual general meeting will be on June 13, 2004.

Helen Hancox, ARMA,
President, NZ Branch.

SA

A hands-on product demonstration of the new electronic document and records management system called 'DocBanq' was held on November 14 in Adelaide. Those who attended found that the ability to try the system first hand was invaluable.

Our Christmas breakfast on December 9 at the Adelaide Zoo was well attended. A subtle acoustic background of live monkey chatter and the calls of an array of bird life accompanied breakfast. The speaker, **Brian Nielson** from Experience Matters, kept the topic light as he discussed his beginnings in records as a radio personality and the transformation that

took him to records, as in records management. His presentation was quite motivating and many heads nodded in agreement around the room as he spoke.

Several presentations are in planning for this year, keep an eye on the website for updates. Why not post some requests on the SA members e-community to help us provide relevant topics?

Kristen Keley, ARMA
President, SA Branch

QLD

Queensland Branch members enjoyed a social occasion to see out 2003. A large group gathered at a Brisbane Hotel to enjoy the festive occasion and catch up on the latest happenings.

It has been a busy year in Queensland. Our Professional Development program delivered 9 seminars, 6 editions of the Branch newsletter, 4 breakfasts and a state conference. In addition, the Queensland based chapters have been busy with members meetings. Also planning for the 2006 National Convention to be hosted by Queensland commenced. All in all there has been something for everyone.

There have also been some changes at Branch Council. Brett Clark who has been on Branch Council for 15 years retired from Council at the end of December. We all thank Brett for his hard work over many years, unfortunately Virginia Bolger has also resigned. But the good news is that we have a new Branch Councillor, Jennifer Curley ARMA who has also agreed to fill the roll of Branch Secretary.

The Branch has also been invited to participate in a number of education initiatives currently under examination. The Queensland University of Technology is examining the introduction of a master of Information Management from 2005 and the Queensland State Archives is examining options for records management courses. The RMAA is pleased to have representation on committees considering these issues and looks forward to working with external bodies.

What's happening in 2004. The professional development program will be back with a new selection of seminars, another state conference is being planned and there will be more breakfasts. We look forward to seeing you in 2004.

Philip Taylor MRMA
President, Queensland Branch

ACT

A new year has begun and it is shaping up to be a very busy and successful year for the ACT Branch. This year we play host to the 21st International Convention for RMAA in September, a time of great enjoyment in Canberra with the Florida festival and many great places to visit in the national Capital. We are planning a very interesting and busy program and hope to attract delegates from all aspects of the business sector.

The Branch finished 2003 on a high note with a recordkeeping policy seminar supported by presentations from National Archives of Australia and the Australian National Audit Office and sponsored by Alphawest.

It gave me great pleasure to present Associate Member upgrade certificates to Tracey McKnight, Graham Baseden and Gail Brown. Congratulations to you all and I hope you will enjoy contributing and working with the Association.

The Branch Executive was honoured to be invited to the Christmas function and presentation given by the Institute for Information Management ACT, it was a very enjoyable night of networking and collaborative planning and we hope to see more cooperative events between our organisations in 2004.

In October, I was invited to participate in the Archives Symposium coordinated by the Australian Society of Archivists to help provide a more pro-active approach to sustainable archive holdings for business records in Australia. The RMAA offered its full support to help preserve some of the important history of Australia's business community and indeed work together to find a way of maintaining valuable information in an era of electronic process and strong business focus.

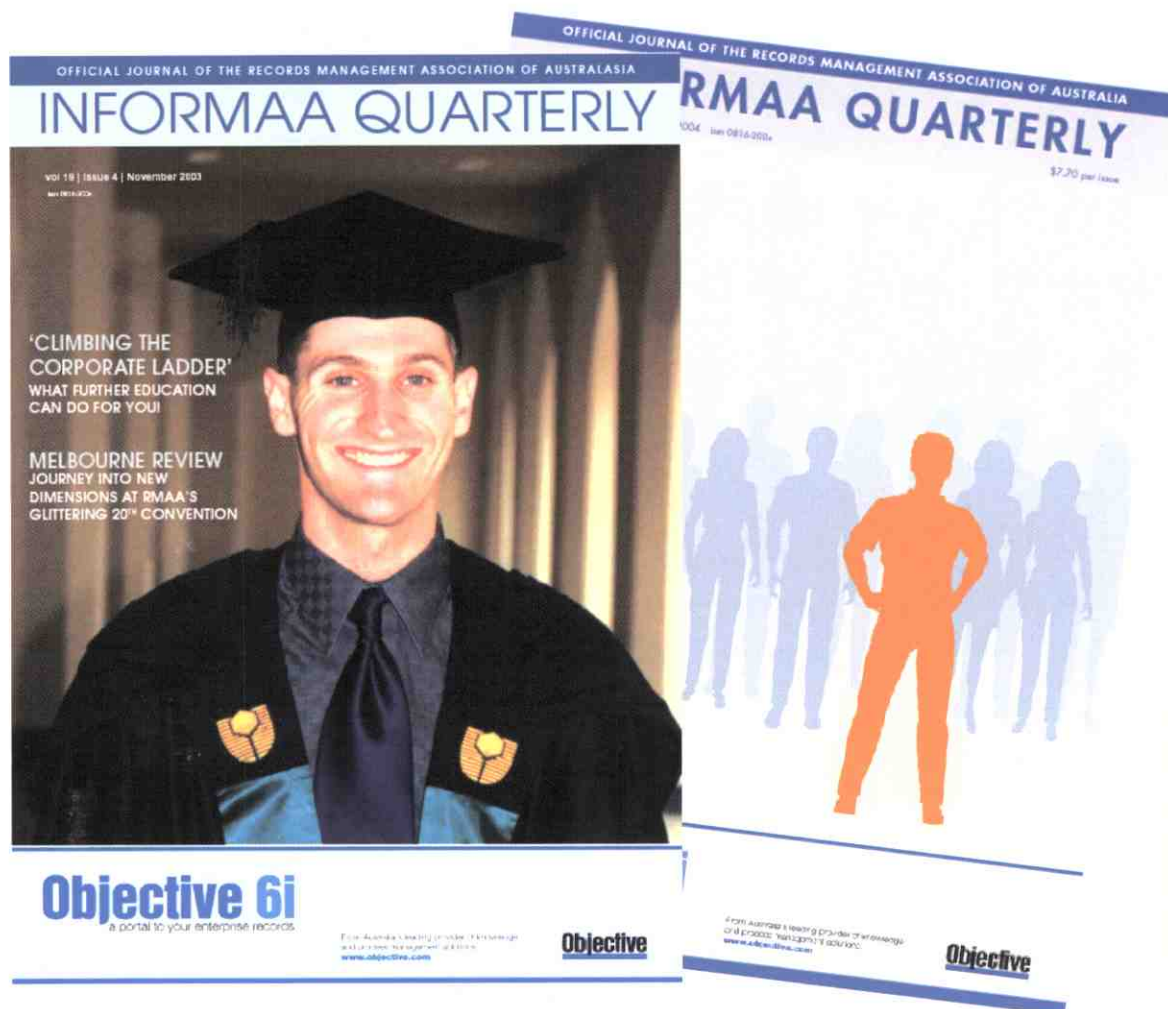
I remind you to register early this year for the 2004 International Convention. I urge all ACT members to participate and invite members and non-members internationally to register for what promises to be a very exciting program.

Veronica Pumpa, ARMA
President, ACT Branch

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