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INFORMAA QUARTERLY

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Editorial Notes

INFORMAA QUARTERLY is a publication of the Records Management Association of Australia. Members of the Association receive the Quarterly as part of their membership entitlement.

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Cover photograph : Members of the 8th National Convention Organising Committee, Darwin 1991.

Top row (left to right) Celina Natera, Ray Holswich, Judy Watts, Greg Coleman, Lorna Haberman

Front row (left to right) Gloria Corliss, Bronwyn Cook, Marlene Hewitt, (Yvonne Smith absent from photo)

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EDITORIAL

This issue looks at the success of the 1991 RMAA National Convention held in Darwin in September. Despite the troubled economic times, some 200 people and more than 20 trade exhibitors from across Australia managed to obtain the support of their organisations to attend the national event.

In this journal there are photographs of some of the Convention activities and a list of the new Federal Council for 1991/92. The Annual Report of the Association, including Annual State Reports will be issued separate from Informaa Quarterly this year. It is not too early to plan your trip to Sydney for the 1992 National Convention. Some details are included in this issue to whet your appetite.

Informaa Quarterly contains the regular features, as well as articles on a few diverse topics including "Low Cost Solutions", case studies at the Golden Casket Art Union and the Auckland City Council, and two book reviews. Of interest

to all members is the article "The RMAA - Future Directions" by Murray Stewart, and the article on the records management career situation in Britain.

On a different note, Informaa Quarterly is now headed for its next phase of development. A year ago, our objective was to produce a journal with a high level of continuity and quality in editorial material, layout and design. This has been achieved mostly due to the tremendous contributions by members and non members to the content of the journal.

Another organisation will take over responsibility for the editing and production of Informaa Quarterly in the new year. We hope to see the quality and content of the journal developed further.

Thankyou to all who have contributed to Informaa in the past year, and keep up the support in its next phase.

THE EDITOR

* * * * *



Members of Darwin Convention Organising Committee and Federal Directors -
more photos on pages 12-14

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**THIS SPACE
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INFORMAA QUARTERLY**

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STATE NEWS

ACT

The Branch Council regretfully accepted the resignation of our Secretary, Yvonne Tanks. Yvonne and her husband have purchased a business in Urunga NSW and, as such, she could no longer continue her involvement in Branch activities. We will certainly miss her and wish them both well in their new venture.

Kate McCarthy has been appointed Secretary and will also continue as Vice President. The Branch has installed an answering machine for general enquiries, ph (06) 258 7529.

Once again, the ACT provided a strong contingent to the National Convention, both delegates and trade exhibitors.

Comments have shown that the programme and social activities were very well received. The NT Branch is congratulated for putting together such a high standard Convention.

At the time of writing, the marketing survey was nearing completion. The members survey was completed by the end of August and MAP Marketing Advisers have almost finished the survey of interested nonmembers. The final report is expected to be available for the Federal Executive meeting in November.

Our October seminar was on Voicemail and Electronic Mail and was informative, well presented (including some real time demonstrations) and was very well received by those attending. The seminar was presented by Kylie Pascoe, MessageBank Marketing Manager for Telecom, and Robert Smallwood, National Manager of Voice Processing Communications Systems for Honeywell. With these types of systems becoming more prevalent in many organisations, this seminar was a timely introduction to these facilities.

Our December seminar will be a case study of the optical disk system being installed at the

Civil Aviation Authority and will be presented by speakers from Hermes Precisa Pty Ltd.

Ross Thompson
President, ACT Branch

* * *

NEW SOUTH WALES

As one convention ends another convention gets closer and NSW will be putting their effort into providing Australia with an exciting and thought provoking convention.

The 9th National Convention will be held in Sydney 8-11 September 1992 at the Sydney Hilton Hotel. It is hoped that as many members as possible will put this date aside now and support the Convention by actively participating. The keynote addresses will cover Professional Development through Education; Where is Technology Moving; and Synergy of the Profession. The organisation of the conference is on time with most speakers confirmed.

The big feature of this conference is the early bird registration of only \$495, this is almost \$200 off the normal registration fee. So get in early.

The new Branch Council has met a few times now, and all councillors are keen to serve the Branch and to provide interesting and varied meetings throughout the year. So come along to the meetings, get involved and you find that you will get more out of the Association.

Chris Fripp
President, NSW Branch

* * *

NORTHERN TERRITORY

Well, the big event has come and gone, and we seem to have come through it unscathed!

Seriously though, we were delighted with the success of the 8th National Convention - it is probably true to say that it exceeded all our expectations! Hopefully, all the delegates enjoyed the social events and the interaction with others, and derived some benefit from the program.

Having been almost solely engrossed in organising and running the Convention for the past few months, there is very little else of significance that the Branch has done on which I can report. Perhaps of some interest are the Office Bearers for 1991/92, who are as follows:-

President	Judy Watts
Vice-President	Yvonne Smith
Secretary	Gloria Corliss
Treasurer	Barbara Pedersen
Federal Directors	Ray Holswich Judy Watts

Congratulations to Ray Holswich on his election to the position of Federal President.

The big challenge for the Branch now is to capitalise on the success of the Convention and to deliver a level and quality of service to our members which is commensurate with what they experienced at the Convention. We feel that the Branch has "come of age", and that there is now a level of expectation which we must meet if we are to maintain the impetus that the Convention has afforded us.

Judy Watts
President, NT Branch

* * *

QUEENSLAND

The Queensland Branch continues to pursue its goal of increasing awareness of the Association's presence and of fostering new

membership applications in addition to servicing it's existing members.

During September there were seven enquiries regarding membership of the Association which resulted in information packages being sent. Three members were accepted for status upgrade to Associate, they are C Kirby, J Spillane and K Kudera, and congratulations are in order for these three people.

Our participation in the Careers Market at the Boondall Entertainment Centre generated some interest and our future participation is now being considered by the Continuing Education Committee.

The workshop program is, as always, being well received with maximum participation by members. The barcode display at the Brisbane City Council was eagerly sought by more members than could be accommodated.

The presentation by ITI (Information Technology International) of their DBQ/RMS records management system was once again a full house.

The November workshop/luncheon featuring Keith Abraham, who will speak to us on Managing Change, with all the 'right sizing' occurring in the Public Sector here in Queensland, is highly relevant.

The Christmas extravaganza will feature a leisurely cruise to the upper reaches of the beautiful Brisbane River (ps. it's better than the Yarra). The focal point of the evening will be a barbeque dinner accompanied by the keyboard talents of Andrew Kerr.

October saw the resignation of Murray Stewart from the Brisbane City Council after some twenty years with that organisation. Murray is a popular member of the Queensland Branch who has served in many executive positions on the Branch Council since becoming a Councillor in 1985. In 1986 he was elected to the position of Federal Councillor and was appointed Federal Secretary in 1988. Murray and his family have decided to pursue a family business venture in New South Wales and all members of the

Queensland Branch wish Murray and his family all the very best.

Terry Tolhurst
Secretary, Queensland Branch

* * *

SOUTH AUSTRALIA

Recently, several changes have occurred on SA Branch Council. Firstly, Madelaine Fulcher (Workcover) has resigned from Branch Council, and also John Dippel (Woodville Council) has resigned as Editor Informaa Newsletter and from the Status and Standards Sub Committee.

Andrew Wood has taken on the task as Editor SA Branch informaa.

Coming events planned by the SA Branch include a visit to Parliament House and the Parliamentary Library on 4 November 1991 and the SA Branch Christmas Party at the German Club on Tuesday 3 December.

Following the success of seminars in 1990 and 1991, plans are being developed for two seminars in 1992. The first planned for March will be our first outside Adelaide at a regional country centre, whilst another is planned for June 1992.

Andrew Wood
SA Branch

* * *

TASMANIA

The Education Committee has developed a programme of training courses and seminars to be held over the next 12 months. Courses planned include Practical Conservation of Records, Vital Records Identification, Disposal Schedules, Cradle to the Grave - Basic Records Principles, Practical Keyword Thesaurus Use, Centralisation vs Decentralisation, Vital Records Preservation, FOI workshop.

In September the popular course "Cradle to the Grave" was conducted in the north of the State in Devonport. The course was well attended and

generated a lot of interest in records management and the association in the north of the State.

A forum aimed at senior records personnel and managers to assist with professional development was held in October in Hobart. The forum highlighted some interesting questions. The Branch is planning to follow up this course to allow further debate on the subject.

The Branch is seeking a sponsor for an award for the student of the year to be awarded to an outstanding student studying Records Management at the Hobart Technical College in 1991.

The Convention Committee is now beginning serious preparations for the 1993 Convention to be held in Hobart. Work has already begun on the selection of speakers and participation by the trade for the trade display.

Tina Howard
President, Tasmanian Branch

* * *

VICTORIA

This new financial year began with the Annual General Meeting. This year the AGM was held on the 36th floor of the new BHP House. There were approximately 40 attendees. Apart from the proceedings of the AGM, Ms Lindy Saul, and Ms Judith Ellis presented informative papers on the future directions of records management. Both speakers' papers are available from the Secretary Victorian Branch RMAA.

The 1991/92 Victorian Branch Council consists of the following office bearers

President	David Moldrich
Federal Director	
Vice-President	Judith Ellis
Editor Informaa	
Secretary	Rosemary Kaczynski
Federal Director	
Treasurer	Janine Patience
Assistant Secretary	

Registrar Candace O'Shaughnessy
Functions Co-Ordinator

Education Co-Ordinator Chris Hurley
Status Committee Frank Upward
Chairman

Local Govt. Chapter Rod Biggs
Co-Ordinators Kay Lewis
Branch Councillors Peter Clarke
Ann Lewis
Gary Omond
Betty Powell

It was with some regret that the Victorian Branch accepted the resignation of Mr Bill Williams. Bill's contributions to both Branch and Federal Council will be remembered for some time to come. I am sure that all members will join me in wishing Bill continued success for the future.

Despite Victoria being the hardest hit State in terms of the recession, we still managed to have 28 participants attend the 8th National Convention in Darwin. Special mention is made of two Victorians, Mrs Kay Lewis and Ms Mary Neeson who both funded themselves to attend this event. The Northern Territory Branch are to be congratulated on an excellent convention.

****STOP PRESS. WHICH SOUTHERNERS DID MORE THAN THEIR SHARE OF ENTERTAINING IN DARWIN, BECOMING CELEBRITIES OVERNIGHT?****

On a more serious note, the Victorian Branch has made a firm commitment to improving all services to members. This ranges from membership and training, to better internal administration. We intend to put our members first.

Rosemary Kaczynski
Secretary, Victorian Branch

* * *

WESTERN AUSTRALIA

The 90/91 year is now behind us and we look forward to new challenges. Our new Council is formidable. The 12 Councillors and our

Education Committee look forward to the coming year. The only position not presently held is Newsletter Editor and we ask anyone interested to contact us.

It is an opportune time to thank our past Councillors for their contributions and wish our new Council all the best. We should also thank our Federal Directors and Federal Executive who work tirelessly, without fanfare to keep us running in tune with the many new Company Act, Rules and Regulations. We must look further than our own backyards when backslapping, the RMAA is a large Company.

Congratulations to all the Northern Territory Branch for organising a very professional and memorable Convention. The papers, presenters, trade and social aspects were very well received and worthy of the effort involved. A fireworks display at a Convention Dinner, that is some act to follow!

At a Branch level the awarding of Life Membership to Graham Dudley was a highlight. Graham's dedication and commitment cannot be questioned and it was great to see the total acceptance by the members of his many achievements within the RMAA. Well done Graham and certainly well deserved.

The program of events for the balance of the year is diversified with our Big One 'Records and the Law' to be held on March 31. The cost for members will be \$100.00 which will include lunch, morning/afternoon teas and end of seminar fellowship. This price and the best available presenters will make it a must for all Records Managers in our State. A Christmas Records breakfast with the theme 'Marketing Records Management' will be presented by Brian Greedy on December 4 at the Princess Hotel, with a membership cost of \$8.00 including breakfast. This thought provoking address should not be missed. Some nine functions are organised for the remainder of the year.

Our Branch looks forward to what eventuates in Education at a federal level this year and with Maggie Exon and her Committee we know we are in safe hands. There is much to be done, but

a substantial grant by TAFE nationally should ensure a kick start, in a long process.

Roley Sharpe as Treasurer and Jim Bonzas as Membership, Promotions and Standards and Status have both contributed greatly over the past year. Thanks are conveyed to them for their consistent contributions. Norma Easthope has taken on the role of Secretary and looks forward to her future involvement.

Our Conflict of Interest document was approved by Federal Council in Darwin. Federal Council

congratulated the WA Branch on the way they produced and handled this difficult task.

We all look forward to the coming year and hope to hear and see State members on a more regular basis. If eastern state or territory members are travelling west please do not hesitate to contact us for information about our Branch or even assistance with your stay in the finest capital in Australia.

Norma Easthope
Secretary, Western Australian Branch

* * * * *

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RMAA FEDERAL COUNCIL

1991/92

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	Neil Granland (WA)	ph. (09) 326 4038

RMAA 8TH NATIONAL CONVENTION REPORT -

DARWIN SEPTEMBER 1991

by Ray Holswich, ARMA, Chairperson, Organising Committee

Although all the thankyou's were said at the conclusion of the recent 8th National Convention, it is fitting that a report be given to those members and non members who were unable to make the epic trip to the Northern Territory to enjoy the Convention.

It was the Organising Committee's objective that the Convention would be a success professionally insofar as the presentation of papers was concerned, as well as giving delegates the opportunity to meet and mix socially. Both the professional and social objectives were achieved. As far as the social activities were concerned, well! what can be said, the idea of holding the social activities outdoors proved it's worth particularly after delegates were behind closed doors for much of the day. The reaction by delegates during and after the Convention was extremely heartening to say the least and I'm sure the members of the Organising Committee were appreciative of the good wishes extended to them. I know that I can speak on their behalf when I say that we all felt pretty flat after the event and thought well what can we do now?

The presentation of papers was exceptional and to all those who agonised over the writing and presentation of their papers I extend to you our sincere thanks again, to coin a phrase "you done good".

Well what happened at the 8th National Convention?; you might well ask, let me assure you it's pretty difficult to find an appropriate starting point. The traditional Welcoming Cocktail Party was held on Sunday evening in the watergardens of the Beaufort International Hotel and then most delegates were left to their own resources afterwards to enjoy each others' company at dinner and so on. As far as possible formalities were thrown to the wind with the exception of the Official Opening by the Administrator of the Northern Territory The

Honourable Mr James Muirhead AC QC who recalled his days as an Article Clerk with a law firm and the importance that was placed on recorded material during the days of pen, quill and eye shades. At the end of speech, His Honour extended a Territory welcome to visiting delegates and declared the 8th National Convention open.

The Keynote Address was given by Fred Diers CRM, he was followed by Tony Poynton and Kathryn Dann who spoke of the effective use and the impact of technology on information management. The Trade Display was opened in the afternoon by the NT Minister for Industries and Development the Honourable Steve Hatton. The remaining afternoon was left free to allow delegates to view the Trade Exhibition.

Things really started to hot up with the International Food Market being held in Bicentennial Park and then a massive invasion of one of Darwin's better known "drinking holes" took place afterwards. Delegates were certainly in a fine state the next morning and ready to cope with all placed before them. Still suffering from headaches on Tuesday evening dressed in all our glad rags (Territory style) we journeyed off to the Diamond Beach Casino for more frivolity, wining and dining at the Convention Dinner, viewed a magnificent fireworks display, and danced until our feet were sore in one of Darwin's balmy evenings. I have no comment to offer regarding the number of headaches being suffered the next morning.

Wednesday saw the presentation of more excellent papers dealing with topics like

- Educating Tomorrow's Information Manager
- Marketing Your Services
- Achieving More With Less Resources
- The Role of Tomorrow's Information Manager and finally

- Managing Change, and Motivational Talk presented by the Assistant Commissioner of Police in the NT Mr Bill Goedegebuure.

Finally, a very special thankyou must be afforded to the Management of CANON AUSTRALIA for their magnificent support of the 8th National Convention and of the Records Management Association of Australia generally. I would also like to place on record my own personal expression of thanks and gratitude to the members of the Organising Committee for a truly great effort and in doing so, name them

individually for the whole of the RMAA membership to acknowledge also

Judy Watts
Yvonne Smith
Greg Coleman
Gloria Corliss
Celina Natera
Marlene Hewitt
Bronwyn Cook
Lorna Habermann

I look forward to meeting with you all again in Sydney in September 1992.

* * * * *

DIARY DATES AROUND AUSTRALIA

DATE	TOPIC	LOCATION
December 3 1991	PRESENTATION OF OPTICAL DISK IMPLEMENTATION AT THE CIVIL AVIATION AUTHORITY	ACT
December 1991	BRANCH CHRISTMAS PARTIES	ALL STATES
February 1992	STATE SEMINAR	MELBOURNE AND COUNTRY LOCATION
February 18 1992	SEMINAR - STORAGE MEDIA AND THE LAW	PERTH
March 1992	STATE SEMINAR	SA COUNTRY LOCATION
March 11 1992	PROJECTING A PROFESSIONAL IMAGE IN RECORDS	YWCA CONFERENCE CENTRE SYDNEY
March 31 1992	SEMINAR - RECORDS AND THE LAW	PERTH
June 1992	STATE SEMINAR	ADELAIDE
September 8 1992	RMAA 9th NATIONAL CONVENTION. "INFORMATION PROFESSIONALS - A FOCUS ON SYNERGY". EARLY BIRD REGISTRATIONS ONLY \$495.	SYDNEY HILTON

* * * * *



RMAA 8th NATIONAL CONVENTION

LEFT: Speaker Kathryn Dann -
lost in the wilderness
on the opening day.

BELOW: Delegates at the
Welcoming Cocktail
Party





ABOVE: Delegates at the
International Food
Market, Bicentennial
Park

DARWIN 1991

RIGHT: Convention lunches -
Darwin style



DARWIN 1991. TRADE DISPLAYS



THE RMAA - FUTURE DIRECTIONS

by Murray Stewart

This is the text of a presentation made by the RMAA to a joint meeting of information related associations in Sydney 1990. Participants included the RMAA, ASA, ACA, ALIA, MRAA and ACLIS.

The Records Management Association of Australia was incorporated in 1975 and is governed by its own Memorandum and Articles of Association together with Association Regulations.

The Association's business is managed on a national basis by

- a Federal Executive and
- a Federal Council consisting of two elected professional members of Branch Council from each State and Territory.

Each State and Territory has a Branch Council consisting of a minimum of nine and a maximum of 15 professional members (holding Associate, Member or Fellow membership) to administer the functions and affairs of the Branch.

The Records Management Association of Australia is represented on two National Committees, namely

- The Standards Association of Australia and
- The Australian Information Technology Council

and internationally on the International Records Management Council.

There are three National committees within the Records Management Association of Australia. They are

- National Education Committee
- National Status and Standards Committee and
- National New Technology Committee

The RMAA has been concerned for some time about the image and promotion of the Association and is currently evaluating quotations and other documentation recently received in relation to the viability of a National Marketing exercise. The survey is expected to cover all marketing variables to allow us to produce an effective marketing plan over a period of time. Some of the variables include

- the current image of the RMAA
- the perception of the nature of services provided
- assessment of services provided
- promotional methods
- fee perceptions
- the methods used to reach the membership either member or non-member etc.

With the present emphasis on educational qualifications as a pre-requisite or selection criteria for higher classified records management positions, the Records Management Association has undertaken to look at the ramifications associated with the possible accreditation of all three forms of College, University and TAFE education. We, as an Association are very much aware that Technical and Further Education provides a grounding for those entering the records management environment and is also an avenue for those already working in the field to update their knowledge.

From a tertiary education point of view the Association is aware that Bachelor and Degree courses associated with records and information management attached to higher education institutions in either Business or Arts Faculties are available in Western Australia and Victoria. However, the question that is being asked by members of the Association is one relating to the university courses and the curriculum content. Does it provide those outside the immediate records management area with the necessary practical skills to step into a senior records management position? I would suggest the answer is no!

Another problem associated with education is the availability of suitably qualified persons to teach the subjects associated with records and information management. I'm sure that much can be gained from an exchange of dialogue between the like Associations, particularly in relation to education.

Perhaps there is scope for assistance and or use of other information professionals who have already placed accreditation in operation which could result in a uniform Education Policy throughout Australia covering all Information Workers.

Today's economic climate does not provide an easy path to the establishment of tertiary courses without the usual demand for financial input from the proposer, which hinders our efforts in this direction.

So, is there a case in Australia for standard courses allowing students to specialise after completion of standard subjects?

The possibility of increased interest across our associations in such a course is worthy of further investigation.

Perhaps there is already a pointer in this direction with many librarians and record managers completing two courses of study and gaining dual recognition in these professional fields.

The Records Management Association of Australia through its National Education Committee will continue to strive toward "national accreditation" in the next three years.

Reciprocal rights, in publication of articles, attendance at seminars/conventions at member rates and parallel membership if a member's qualifications could be recognised across the various organisations, would provide a larger base from which to attract attendances at national and state events.

The question could also be asked, is there room for a National Information Convention with dedicated days for the various professions and their specialised area of interest?

Joint National Executive premises and staff appear to have benefits across the board. This can be illustrated by a recent offer by ALIA of the services of its Industrial Officer on a user pays basis.

Those organisations not able to establish such facilities could make use of this service, with time and costs being divided on a per member basis.

There is, in the RMAA, a feeling that this type of facility may be out of reach due to initial set-up costs and the subsequent yearly operations, unless increased membership fees were realised.

As part of a commitment to its membership, the RMAA Federal Council accepted an ACT Branch initiative to conduct a national marketing survey.

The Marketing Survey will cover the following aspects

- the association's market
- member situation
- management situation
- competitive situation

Key issues to be covered include

- internal strengths and weaknesses of RMAA
- environmental opportunities and threats

Assessment of marketing and business objectives, which will include

- growth objectives
- services positioning
- promotions objectives
- projected income performance

The Marketing Strategy will include

- service mix
- recommendations on fee levels
- prioritised promotion menus
- effective methods of reaching potential members

Our aim is to have a clearly defined course of action in place, paving the way for a far stronger and committed Association.

This course of action will answer many questions and provide for a long term business plan.

Finally, on behalf of the RMAA, these commitments have hopefully set the theme for the commencement of an ongoing dialogue benefitting a number of information related

organisations.

This meeting should be seen by all present here today as perhaps the commencement of a combined drive to fully establish the Information Worker as a true professional in the eyes of the Australian Industry outside the computer industry and its own individual role.

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For more information, please contact our Head Office —

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RMAA 9th National Convention

8-11 September 1992

Sydney, Australia

"Information Professionals - A Focus On Synergy"

PROGRAM

KEYNOTE SPEAKERS:

Professor Mairéad Browne
University of Technology, Sydney

Mr David Major
DMR Group, United Kingdom

The Honorary Barry Jones MP
(to be confirmed)

Professional Development Through Education

Synergy of the Professions

Where is Technology Moving?

SESSIONS:

Ms Janet Howse
City of Sydney

Mr Tam Best
Road Traffic Authority

Ms Sue McKemmish
Monash University

Ms Joanna Newman
Fletcher Challenge, New Zealand

Associate Professor Joyce Kirk
University of Technology, Sydney

Mike McLean
Mike McLean Management Consultants

Ms Marito Hoo
Information Enterprises, Western Australia

Ms Lynn Allen
Alexander Library, Western Australia

Ms Lynne Hunter-White
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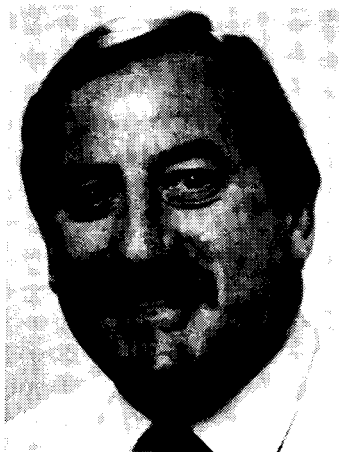
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MEMBER PROFILE

RAY HOLSWICH.

Ray Holswich is the incoming Federal President of the RMAA for 1991/92 after spending a number of years on Federal Council. He was Convenor of the 1991 RMAA National Convention Committee, and is now basking in the glory of the highly successful "Top End" event. Ray is also Records Manager for the Northern Territory University.



my hand and put the NT forward to host the 1991 Convention. I also recall getting a crack in the ribs from Judy as well as being told that I was mad.

IQ How do you feel after the huge and successful effort of the Darwin Convention?

RH Still hung over! No not really. I feel very proud to have been the Chairperson of the organising committee from both a personal point of view and for the Northern Territory Branch, considering the size of the Branch and the fact that we have only been a Branch for six years. To say that you feel great afterwards is quite wrong; I know that I experienced a feeling of emptiness and thought to myself well what's next. It took a long time to regather my thoughts, three years of planning, 12 months of damned hard work and then the realization that it was all over. It now seems that the Convention took place years ago.

IQ What inspired yourself and Darwin to take it on?

RH I recall the inspiration very vividly, and I often chuckle to myself about it. I remember attending my first Federal Directors' meeting during the Melbourne Convention and bids were called for future Conventions. I said to my co director Judy Watts "do you reckon the NT could do it?" and before Judy could say yes or no I raised

IQ What has been the driving force behind your involvement in records management generally?

RH When I entered the Commonwealth Public Service in 1964 (back in the days of eye shades and quills) as a very inquisitive junior clerk, I took more than a general interest in the happenings and operations of the Central Records Section and I can always remember being told to ask "why" things were done a certain way. I asked "why" so often that I was transferred to the Organisations and Methods Section, then I could ask "why" without having my wrists slapped. Since then I have continued to be interested in information management systems and probably will be until I drop off.

IQ What do you consider to be your best achievements or events in records management?

RH Events - obviously the 8th National Convention. Other achievements - there have probably been a lot over the years but I suppose being asked by the management of major departments to conduct systems reviews and then seeing your recommendations put into place is gratification and achievement on its own.

IQ Can you tell us about the level of records management activities in the Northern Territory?

RH 10 years ago I would not have given the Northern Territory a hope of reaching the standards in records and information that the southern states had reached. Things have certainly changed since then and more and more people are showing a greater level of commitment to the records and

information industry. There is a constant search for excellence in the quality of the systems being used in many departments and authorities.

IQ What is the status of records management at the NT University?

RH I will simply say that the Northern Territory University has a long way to go and the amalgamation of technical and higher education facilities together with people's tunnel vision has not helped the situation.

IQ How long have you been active in the RMAA, and what changes have you seen over that time in the Association?

RH From memory I think I first became involved with the RMAA in 1969, in Canberra around the time when the Canberra Branch was formed, I recall attending the Inaugural Meeting at the RSL Club in Turner, and would you believe the ACT Branch still holds its meetings there.

The changes - are too many to mention. I know that through the dedication and hard work of many people throughout Australia that the RMAA is what it is today. I think it fair to say that the Queensland Branch paved the way for the Association when they hosted the 1st National Convention at Greenmount (take a bow Queensland you have just had a compliment paid to you by a New South Welshman).

IQ As the incoming President, what do you see as the main challenges for yourself and the Association for the coming year?

RH The challenges for me personally will be to encourage a greater level of communication between the Federal body and the States and Territories. I think for too long the members of Federal Council have been likened to the FBI by the States. That barrier has to be broken down; hopefully it will be during 1991/92.

As for the Association generally - it will continue to grow I'm sure, and I believe

that the marketing exercise currently taking place will be the lever required for the Association and the people working in the records and information industry to gain greater recognition. In June of this year the members of the Executive met with the Executive of other like associations such as ALIA, ASA, ACA, Medical Records Association etc. That meeting in itself was an historical event, and common interests were shared and discussed, with education being the front runner.

IQ Are you bringing any new initiatives or ideas to the development of the Association?

RH Only time will tell, but I am looking forward to the first Federal Executive meeting in November.

IQ What do you think are the critical issues facing records managers today?

RH I suspect there are several issues, the main one being a records manager's capacity to be able to deal with the changing moods of management and I say that from past experience primarily because the managers are often to blame for things stuffing up simply because they don't know what they want in the first place. The second biggest issue is for today's records manager to be able to cope with the never ending changes in technology. We as records managers are forever being introduced to a variety of new systems. The persons that I really feel for are the records technicians. Most of us have been in the information environment for some time and I dare say we can cope most of the time, but the technicians are not so lucky. I would encourage the authorities in education to continue their efforts in introducing students to the wonderful world of technology, and further to that I would encourage the commercial houses to give the records managers of the future, (and I am talking about students), the opportunity to see the many specialised automated systems available.

* * *

BOOK REVIEWS

**AUSTRALIA AS AN
INFORMATION SOCIETY:
GRASPING NEW PARADIGMS,
REPORT OF THE HOUSE OF
REPRESENTATIVES STANDING
COMMITTEE FOR LONG TERM
STRATEGIES, MAY 1991.**

Australian Government Publishing
Service \$9.95.

**Reviewed by: Philip Taylor, B.
Bus, MRMA, Records Manager,
University of Queensland**

A Committee of the Australian Parliament spent from September 1990 to May 1991, just 9 months, to review Australia as an Information Society. The terms of reference of the Inquiry were widespread and enabled the Committee to examine the many issues associated with the concept. The resulting 52 page report is disappointing in many ways. For a society which has started to promote itself as a "clever country" there is little which is new in the report. It sets out the macro view of Australia as an information rich country and makes strong statements about the need to harness the energies needed to develop into an information society capable of utilizing existing resources as well as creating new opportunities.

This is not the first attempt to develop a National Information Policy. In 1985-86 the Federal Department of Science tried to invoke discussion and debate. Its discussion paper foundered in a sea of interdepartmental rivalry. Prior to this in 1975 was a Committee of Inquiry into Public Libraries in Australia (Horton Report). The main recommendations were never acted upon. It seems that Australian governments have a poor track record when it comes to developing ideas of Australia as an Information Society.

The May 1991 report enthusiastically endorses the idea of having an Information Policy and even suggests that the government introduce the policy as legislation. The Information Policy proposal is very wide-ranging incorporating aspects such as the right to know, industry, transborder data flows, sovereignty, defence, telecommunications/media, media ownership and control, libraries, archives, public accounting information, social justice, privacy education, information research, information statistics, promoting efficient/effective information use, promoting critical evaluation of information and consumer information. The breath of a national Information Policy as discussed by the Committee is certainly widespread.

This is perhaps its weakness. With such a scope of issues, it has made it much harder to focus upon those most critical. It is almost too much for the mind to take in and trying to write a policy would be a minefield of self interest and preservation of existing power arrangements.

The other problem with the Report is not so much about the arguments for a National Information Policy, but are more to do with the framework in which the Report must operate. To really analyse the Report it has to be seen in public policy terms. Without engaging in a long discussion on what is public policy, think of it as what governments do. So what is likely to be the Government's view? The Report was presented to Parliament without a Ministerial Statement and it certainly did not gain media coverage. Perhaps this gives us some insight into what is likely to happen. The Report notes that the large bureaucracies were cautious and pointed out the impracticalities, whilst the smaller bureaucracies were enthusiastic and supportive. The Committee saw this as meaning that the large agencies were

concerned about loosing influence and the smaller agencies as an opportunity to increase their influence (p 32). Remember the fate of the past attempts to tackle the problems.

In archival and records management terms the report did recognize the value of the archival document (see Upward, Informaa Quarterly, May 1991) "As a first step we need to understand which information needs to be stored for future reference; what contextual information is necessary for its comprehension; and which information, once used, is valueless and therefore not worth saving" (para. 4.11 p38). The Committee went on to suggest some ways that recommendations in the Report could be pursued. The principal recommendation was to form a Committee (what else?) to make recommendations on the preservation and use of archival resources (p46). The Report also went on to recommend that the Parliament legislate for the provision of record keeping principles or guidelines to ensure the integrity and historical purposes and to promote ethical record keeping (p47). The Report goes further and states "effective creation and management of archival documents is a pre-condition of an information rich society" (para 4.57 - 4.58).

Admirable objectives but ones much harder to resolve in a practical sense. The legal arguments over the validity of Commonwealth legislation on records created in a state or private company plus the constitutional aspects should keep the lawyers busy for some time.

So what is to be made of the Report? Is it a brave attempt to stimulate debate and place the issue on the public agenda, or can the Report be considered as just another failed attempt to address the issues but ultimately nothing will happen? Unfortunately, I suspect the second is more likely to be the truth, but I would be quite happy to be wrong.

* * *

KEEPING DATA: PAPERS FROM A WORKSHOP ON APPRAISING COMPUTER-BASED RECORDS. Barbara Reed and David Roberts (editors), Australian Council of Archives and Australian Society of Archivists Incorporated, 1991.

Reviewed by: Fiona Reid, BA (Hons) Syd Uni, Dip Information Management (Arch Admin) UNSW. Senior Archivist, BHP Co Ltd.

"Keeping Data" was the title of a workshop held in Sydney on 10-12 October 1990, and organised jointly by the Australian Council of Archives and the Australian Society of Archivists. The presenters included some of Australia's most respected archival practitioners, as well as others, less well-known, who were able to share their experiences of appraising computer-based records. The result, for those present, was a stimulating and challenging program. A number of theories and strategies were floated, some questions were answered, and many issues and problems were raised. This book contains all the papers presented at the workshop.

Then ASA President Anne-Marie Schwirtlich stated in her introduction to the workshop, reproduced in this book, that: "Unless we redefine our approaches the problem will redefine us". The 13 presenters rose to this challenge to offer their ideas and experiences for redefining approaches to appraisal in a positive and productive way.

The book is divided into four main sections: "Computer Systems in Context", "Gathering Information about Computer Systems", "Appraising Computer-based Records" and "Reflections".

The papers in the first section are basically aimed at finding a meeting-place between professions - archivists and records managers on one side, and computer professionals on the other. They address the need for our professions to have a basic understanding of the computing environment and systems documentation, and the problems of

communicating with technical specialists. Some strategies for getting around these problems are proposed.

The papers in the second and third sections introduce a number of approaches, and summarise case studies where some theories have been tested. These papers, especially those by Anne Picot, Lindy Saul, and Judith Ellis, give useful practical as well as theoretical advice about the whole appraisal exercise. All of them advocate targeting one's efforts towards understanding the systems, processes and functions of the agency. The approach of closely examining records to make appraisal decisions is impractical and, as Lindy Saul indicates, inadequate in the context of a whole computer system. Making appraisal decisions about records, according to her paper on methodology, ignores the programs and data which are in the system, and only deals with one possible end product.

Many speakers indicated that the process of gathering information for decision-making must change, to encompass the technical (hardware/software) as well as the organisational environment. Both Michael Hoyle (Australian Archives) and Sue McKemmish (representing PROV) pointed out that we need not undertake technical analysis of records not destined for long term storage - the desirability of retaining the records ought to be established before fretting over the feasibility.

As a number of speakers also pointed out, the challenge for archivists and records managers particularly is to communicate and negotiate effectively with clients and with computer specialists. Reducing the use of jargon (including our own) is one important part of this process.

Case studies were presented from NSW Archives Authority, Australian Archives and the PROV. Typically, some case studies are more generally applicable than others, and some speakers are better able to draw general observations from the experiences recounted. Michael Hoyle suggests that, while early involvement in the development of a system to provide advice and standards is helpful,

appraisal decisions still need to be based on use, and must therefore wait until further down the track. This was a useful comment in the light of a general assumption at the workshop that the earlier we became involved in the design process, the better.

Steve Stuckey's case study of petroleum data tapes raises many interesting points. In a very readable paper, he covers physical concerns - conservation and reproduction - and intellectual issues. He also mentions strategies which have provided the resources to manage this enormous collection.

In the last section, "Reflections", comes the inevitable questioning of the archivist's role in the changing information environment - in this case, with impressive results. Three working archivists with considerable experience and intellectual wherewithal give their views on the challenges posed by computer-based records to traditional theory and their visions for the future of the profession. Frank Upward challenges archivists and records managers to think of themselves as a "record keeping profession", and to acknowledge that the "archival document" is a concern for all of us at all stages of its existence because of its value as evidence. He also emphasises the broader social and legal value of this evidence, beyond the organisation, to the extent of suggesting that technology provides us with the means to move from organisational to social approaches to record-keeping. Michael Saclier aims to be provocative, and raises a number of issues which demand further attention, and are unfortunately not covered by the papers here - notably the proliferation of PCs and the consequent devolution of record-keeping responsibility, and the legal status of electronic records. Glenda Acland provides an appropriate conclusion with her perceptive and useful paper, which discusses whether an archivist should be "keeper, undertaker or auditor". Her conclusion, that archivists need to be auditors, safeguarding the evidence and information although not necessarily taking them into physical custody, comes after a thorough review and evaluation of a number of approaches. The paper provides practical solutions as part of a strong and consistent theoretical framework.

This paper particularly should be required reading for our "record-keeping profession".

The only major shortcoming of the book is that issues involved in long-term retention of valuable records or information are addressed only tentatively in most of the papers which raise them at all. The general feeling seems to be that the bulk of records are still the concern of the agency, not the archives, so we need not be overly concerned with accessibility. For the small percentage needing long-term storage, most archivists favour human-readable formats - COM or paper - despite Steve Stuckey's reminder that some records can only be used or kept in electronic formats. Since the time of this workshop, Australian record keepers seem to have moved on in consideration of the issues involved in longer term storage, particularly in the discussions generated this year by the visit of David Bearman. It is inevitable that a book

like this will, in some respects, be overtaken by continuing developments.

The editors mention in their preface that they did not aim to present definitive answers. The workshop, and these papers, were intended to "break down some of the barriers, to share existing experience and to address some of the concerns that archivists and records managers feel when confronted with the need to manage computer-based records". They believe that they succeeded in this aim, and I agree with them. It is not a definitive work, but is nonetheless an important book in the ongoing development of awareness, and confidence, among Australian record-keeping professionals dealing with computer-based records. Especially for those who were unable to be present at the workshop, I would recommend it highly.

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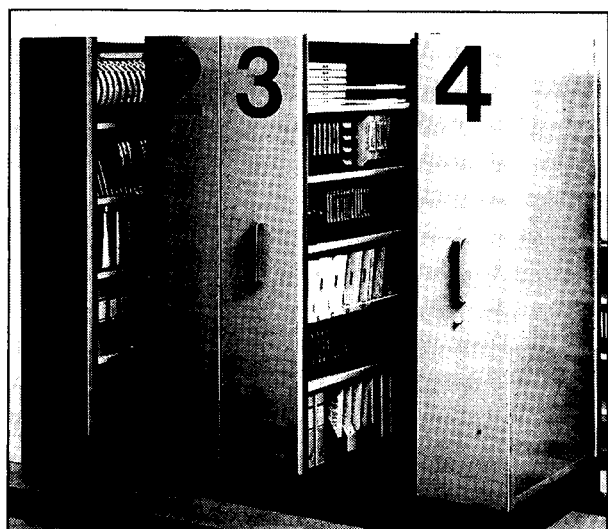
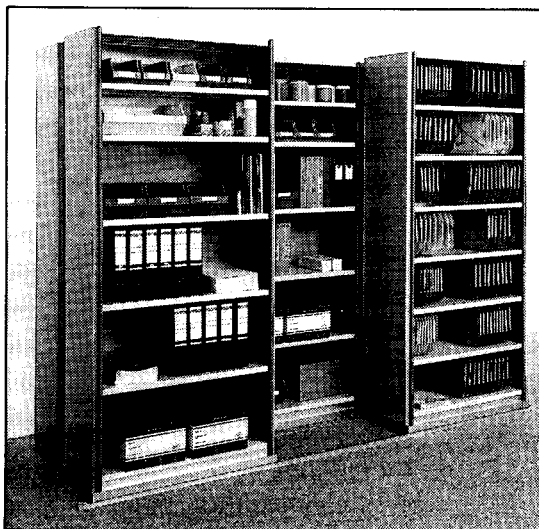
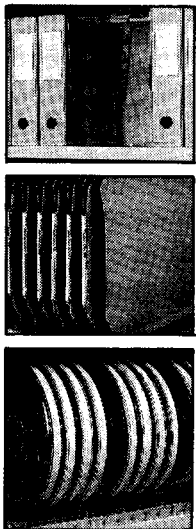
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LOW COST SOLUTIONS

by Joy Siller BA (Lib. Sc.), ALIA

Joy Siller (formerly Stanford) has over eight years experience in the records management industry. This includes over twelve months as Records Manager at Kuring-gai Municipal Council; almost seven as a consultant and trainer with the NSW Records Management Office, during which time she also held the position of Deputy Manager; and 12 as lecturer in records management at the North Sydney College of TAFE. Joy is now Principle Consultant, Siller Systems Administration.

Introduction

Organisations often ask consultants for a low-cost records system. It is particularly risky to recommend a system without knowing the specific requirements and operations of any such organisation.

This paper addresses the problem of finding low-cost solutions to records management problems. To assume that there is a standard "solution" is also to assume that there are standard problems in organisations.

Although there may be a number of similar problem areas for which there are possible solutions, without careful analysis of all needs it would be difficult to choose the best option. There is a definite need to distinguish between a low-cost **option** and a low-cost **solution**. The two are by no means the same, yet it is a common mistake.

I would like to examine some of the key areas to consider when determining low-cost solutions, to emphasise the need for analysing the organisation's requirements, and finally to discuss possible future directions for cost-savings.

Key Areas

To determine the cost of a records system or operation, four main areas are suggested for consideration:

1. Direct personnel costs
2. Direct equipment, material and supplies cost
3. Accommodation costs
4. Procedures

I would like to expand on each of these areas with a view to identifying cost-savings.

1. Direct personnel costs

Salary rates for personnel should be appropriate to the duties performed. There is little benefit to be gained from cost-cutting in this area, yet it is not uncommon for records staff gradings and salaries to suffer when financial belt-tightening is required. It is often at this time that organisations consider whether tasks can be carried out by machines (ie. primarily computers) in an effort to reduce staff numbers.

Aschner (p.126) claims there are two ways to look at technology in these circumstances:

"...you can do the same work you are doing today, but with fewer people; or, you can do more work, and perhaps more kinds of work, with the same number of people. It is the latter that usually applies....if you can use automation in this way, your system is likely to pay for itself long before it becomes obsolete".

Therefore, automation can better be regarded as a method of improving efficiency rather than as a means of saving salaries. Of course, it can be particularly difficult to convince management that the records area may function more efficiently by retaining suitable staff numbers AND adding automation. Abolishing positions is a cost-saving solution to the problem of personnel costs, but, in many instances, not necessarily a way of improving overall efficiency of the records system.

2. Direct equipment, material and supplies cost

In a records management programme, the high-cost items in this area are likely to be storage equipment, computers, paper and other stationery supplies such as file covers.

One of the most expensive pieces of storage equipment for hardcopy records is perhaps the oldest and most common - the four-drawer filing cabinet. It is relatively expensive to purchase and it has been estimated (Aschner, p.4) that, on average, 68% of the costs associated with maintaining a four-drawer filing cabinet are labour and only 32% are related to supplies and space. Given that a four-drawer filing cabinet is an extremely labour intensive system, low-cost solutions to this problem should concentrate on storage equipment which facilitates easy retrieval of records. Provided a secure area can be established, open-bay shelving is usually considered an inexpensive storage option.

Paper is such a readily available commodity that we often forget the expense associated with its use. Many suppliers of alternative media such as microfiche or optical disk, believe huge savings can be made through the replacement of paper. However, this is yet to be proven as there is still a tendency for people to prefer records in hardcopy form and, in the case of newer technology such as optical disk, for legal repercussions to be tested.

An alternative consideration is the improved management of paper through such basic measures as avoiding unnecessary duplication of material on files, and only retaining those documents which have legal, historical or administrative value to the organisation. Improved prioritising and distribution of records can obviate the need to produce multiple copies of a document for distribution throughout the organisation.

As far as other stationery items such as file covers are concerned, the low-cost solution is to "keep it simple". It should be remembered that they are an ongoing expense, and sophisticated systems, such as intricate colour-coding, can often consume valuable staff time.

3. Accommodation costs

A prime concern in records management is space, and a large percentage of the literature concentrates on space when cost-savings are required. If space and the associated high cost of rental accommodation are an organisation's problems, more efficient records storage techniques may be the solution.

A number of these points have already been mentioned in discussing a low-cost solution in relation to equipment. However, the system which is low-cost in respect of capital outlay and ongoing maintenance may not necessarily be the most economical for space. For example, a mobile shelving unit (compactus) is usually much higher in initial cost and ongoing maintenance than open-bay, static shelving, but it provides more economical use of floor space.

It is purported that microfilm can occupy 96% less space than paper records and may be a viable solution to the problem of storing vast quantities of archival material. However, lately it is believed optical disk presents the best potential as the conversion process is simpler. (Snyder, p.41).

Before rushing into a technological option for saving space, it should be noted that a records culling and disposal programme introduces cost controls by removing duplicate and non-essential records from expensive office space. This may prove to be a much lower-cost solution for a number of organisations with little need to retain large quantities of records.

4. Procedures

Many cost-saving measures can be achieved by improving day-to-day procedures, yet they may not be as obvious as some of the other points mentioned in this paper.

Aschner suggests that the real labour costs are incurred during the collecting, reading and processing stages in records management. In addition, it is estimated that most records personnel spend "...about 25% of their time searching for the 1% or 3% of files that are misfiled" (Aschner, p.4).

Because it is often difficult to convince and educate users in the correct procedures for handling information, records administrators tend to institute curative measures. For example, the introduction of portable barcoding is seen as a way of simplifying the file census process. Thus, the need to reinforce strict movement procedures may not be seen as vital because an inaccurate movement record will be detected by the census.

There are many organisations with ineffective indexing methods that would benefit immensely by introducing standard titling conventions. The level of the option chosen - ie. a complex thesaurus or simpler listing of authorised titling terms - will depend on a number of factors unique to each organisation.

Well managed and enforced procedures should not necessarily be overlooked in preference for more expensive solutions, including those which are technology-based.

The Need To Analyse The Organisation's Requirements

To illustrate the need to choose an option which will suit the organisation rather than the organisation adapting to the option, an overview of two organisations is provided. Both chose a similar system for their records management, based on the least expensive option available, but the results were vastly different for each.

Organisation X had a staff establishment of approximately 15 people, all located on one floor of a city office building. Mail was received by the office's secretary and opened with the assistance of the Deputy Manager, who would decide on the appropriate action and staff member to deal with the matter. The total file holdings numbered approximately 2,000.

Despite only being a relatively small organisation, X had problems with information retrieval from its card index and with accuracy of file movement markings which were also recorded on the index cards. As financial resources were restricted within the office, low-

cost was an essential criteria when computerisation was considered as a means of overcoming the problems.

Organisation X decided to choose an AT microcomputer operating with DOS and installed single-user, indexing/movement software on it. The system was located adjacent to the secretary's desk and filing system.

Once installed, the office was able to input file title, number, abstract and movement details into the system. As it was adjacent to the filing system, users retrieving files were monitored by the secretary thereby providing a control over the recording of movement.

For a cost of approximately \$3,000, Organisation X was therefore able to introduce a system which provided considerably improved efficiency for the retrieval and movement of files.

Organisation Y also had a problem with file retrieval and movement. However, unlike Organisation X, its staff establishment comprised approximately 150 people, its physical location was spread over several floors within the building, and holdings were in the vicinity of 20,000 files. Organisation Y, without careful analysis of its needs, also chose the same inexpensive option as selected by Organisation X.

The main problem experienced by Y related to single-user access. Previously, Y had a large card index and manual movement registers. Despite their inherent problems, these manual systems enabled access to both simultaneously. With the computerised system, access was only possible for searching the index OR recording movement details, individually.

Eventually, Organisation Y found it necessary to replace both the AT microcomputer and the software with sophisticated hardware and software. As a consequence, the "low-cost" option resulted in additional expenditure for little result and could obviously not be regarded as a "solution".

It cannot be stressed enough that low-cost solutions are only such if they overcome the problem being experienced by the organisation and do not create additional long-term ones.

Future Directions

Although bigger and brighter technological developments are obviously the way of the future, they are unlikely to provide all the answers despite their many advantages.

As with other technological solutions over the years, there will be applications which are suitable enhancements to an existing system, and others which are expensive "cures" for poor procedures and controls.

As suggested by other writers, enhanced micrographics, optical disks, electronic filing, etc. are industry products. They only become a justified solution when you have established your need and their functions can be seen as answering that need in a cost-effective manner.

Conclusion

As with many aspects of records management, low-cost solutions should be determined by user needs. Stock-standard systems or parts of a system cannot alone be guaranteed as answers to an organisation's problems.

I believe we should be wary of people promoting any equipment or system as a

solution to a problem unless they have first analysed the problem and unique needs of the organisation with whom they are dealing.

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THE GOLDEN CASKETS 'WINNING SYSTEM'

by Paul White

Paul White is Records Supervisor at the Golden Casket Office, Queensland where he has been for the past seven years. Prior to this Paul worked in the hospitality industry. Paul is currently studying for an Associate Diploma of Business. He played an active role in establishing the computerised system at the Casket Office, which is the subject of this article.

The Golden Casket Art Union is a Government instrumentality that reports directly to Treasury. We are solely responsible for the running of Gold Lotto, Instant Scratch-It, Golden Casket and Australian Soccer Pools in Queensland. The combination of these four games for 90/91 financial year yielded a profit of \$126 million from gross sales of \$432 million. This money goes to Treasury and is used in various Government projects such as the funding of the Cultural Centre. The Casket Office has a growing staff of approximately 180. The Records Department numbers five, which consists of an Administration Officer, Records Supervisor, two Classifying Officers and a Clerk.

It was in January 1989 that management first recognised the need for a new Records Section. Until then, there was no organised manual system in place at the Casket Office. Records were stored in three large compactus units. Staff had their own four-drawer filing cabinets, hence files were difficult to locate, impossible to track and there was no central indexing system. Management, through consultation with a software specialist, decided that a computerised system with text retrieval would ideally suit the Casket Offices' needs. Various site visits were undertaken and it was decided that the Records Management System (RMS 11) be purchased and installed through QCOM Pty Ltd, a leading Brisbane based software company.

A Project Team (who were later to become the Records staff) was established and consisted of

an Administration Officer and two clerks. These three staff members, although not formally trained in records management, had a total of over 25 years experience between them at the Casket Office and it was considered that they had both the initiative and the enthusiasm to set up and run such a system. The team decided to introduce a lateral filing system incorporating subject filing with matching colour-coding. Lateral filing was chosen for its cost effective utilization of floor space, and colour coding chosen to enhance the product by promoting quick, easy access.

The first task undertaken by the Project Group was to establish an 'office structure' consisting of primary, secondary and tertiary headings which could then be related to the new computer system. A Project Plan was submitted to management, listing the various areas to be registered, which included tentative dates for completion. Discussions were held with Departmental Supervisors to establish the nature of their files, preferred file titles and suitable retention periods.

With the installation of the RMS 11 software complete, a test environment was set up for the training of the project group by QCOM. We elected first to register an area that was deemed fairly straight forward. This was done in the test environment and later transferred to the live system. Barcoding was included on all labels for tracking, moving and auditing of files via portable barcode wands. In April 1990, with Stage 1 of our Project Plan duly completed, we decided to officially launch the RMS 11 to the Golden Casket Staff. Mr Harry Haxton, B.Econ., MRMA, AIMM, a special guest speaker, was invited to address the staff on 'The Importance of Records within Organizations' and to encourage them to co-operate with the imminent changes. The first step successfully focused people's attention on the new system. Staff training was then initiated in small groups and was carried out in the test environment as each department's files went on-line.

The second important step, involved convincing staff members of the numerous benefits available through a Centralised Records System. This was to ensure complete co-operation with the physical transfer of their files to the new Records Department. This proved to be quite a daunting task as there was quite strong resistance to change among some staff members. Thus, a certain amount of PR work was required to promote the system and help smooth the transition. Wherever possible, personal attention was afforded to staff members who had any doubts or queries. Casket staff began to realise that by failing to utilise the system, they disadvantaged not only themselves but all staff members. To enhance further the service offered to staff the software was modified to permit immediate requests for files to be keyed into the system and actioned immediately, thus saving staff members 'the walk, the talk and the time'.

With the ongoing registration of files and the gradual building up of the system, we found ourselves becoming more confident with both the concept of centralised filing and in the system itself. Records staff members also attended various conferences and TAFE courses

to enhance their records knowledge.

In December 1990 with over eight major organisations then utilising the RMS 11, a User Group was formed. This proved beneficial as a line of communication between users and suppliers, and as a place for common problem resolution. It also gave us, as users, some direct input into future product direction. Initially we estimated that we would have approximately 6,000 files to go on the RMS system. To date we have registered almost 7,500 files and are only $\frac{3}{4}$ through the office. Areas that are presently on the system are Administration, Personnel, Finance, Marketing and Distribution. Still to go on-line are Operations, Security and Audit. We anticipate the full registration of the Casket Office by late 1991. We still consider ourselves fairly new in the records game. We find that with the constant registration of new material, it is very much a review process to maintain uniformity throughout the office. Having managerial approval and support was crucial to the success of the new Records Department. We have realised that a successful records system is a powerful tool - one that we are using to help build a stronger, better, more efficient Casket Office.

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RECORDS MANAGEMENT AT THE AUCKLAND CITY COUNCIL

A PERSONAL EXPERIENCE

by Bruce Symondson, MA

Bruce Symondson is the Records and Archives Manager for Auckland City Council, New Zealand. This paper is 'a personal experience', and not an overview of records management throughout Council. Bruce's background is archival, with a now increased records management content. He has a degree in history and political science, and a Master of Arts in history, and later had seven years at National Archives, almost entirely spent in the appraisal section.

The 'life-cycle' continuum of records does not provide a clear or simple point at which records management ends and archiving begins. One cannot with authority say whether the development of disposal programmes are the records manager's responsibility, or the archivist's. Organisations have differing answers usually depending on practical rather than theoretical considerations. In the years I worked at National Archives there was in principle a formal demarcation of responsibilities with the State Services Commission (SSC). National Archives, in conjunction with departments, dealt with the development of disposal programmes. Records Centres were provided as facilities for semi-current records. Anything to do with current record systems, including classification, procedures, equipment and staff training was dealt with by the SSC. The monumental inactivity of the SSC created a vacuum into which appraisal archivists were sucked, regardless of their level of interest, as concerned and/or harassed record officers had no one else to turn to¹. The archivists had three advantages

- 1) the archival holdings provided a historical perspective on systems, and thereby a good indication of what had worked, and not worked, in the past

- 2) appraisal archivists necessarily saw a considerable number of current systems in operation, again both the good and the bad, and even the ugly. Related to this was contact with those record officers who had shown the ability and initiative to reform systems, and could therefore be expected to assist others. The archivists were a crucial link in a network of knowledge, experience and contacts.

- 3) knowledge that both immediate and future archival work would benefit from useful advice being given concerning current systems. If an incentive was needed this knowledge provided it.

I found that the records management advisory role became an interest in its own right, one further developed by my completion of the Diploma in Archives and Records Management at the University of New South Wales (1982). For me the position of Archives and Records Manager of Council was created at a convenient time (late 1984) and suited my developing interest in records management, while keeping one foot firmly with archives.

At the time of my appointment² space in the administration building was at a premium. Disposal of records had taken place, but had been both inadequate and occasionally misguided. The production of copious records that seems an inevitable feature of all modern bureaucracies had, in the case of Council, been given an extra twist by a building boom which created exceptional workloads in a number of departments.

Prior to my appointment, Council had created the position of City Secretary, to detach the Town Clerk from a direct departmental responsibility, allowing the latter to function

more effectively as a genuine Chief Executive. At the time of my appointment both the City Secretary and Town Clerk were relatively new appointments. As neither were responsible for the existing situation they had no inhibitions in criticising it.

The Secretarial records system handles all papers that go to the meetings of Council, its committees and sub-committees, and any related correspondence. It is also used by a small number of senior managers - the City Secretary, Town Clerk and Associate Town Clerk. Works, Planning, Parks, Traffic, Treasury and Valuation all have independent systems. The system had been re-classified in 1977, but unsuccessfully. The classification system was badly constructed, the finding aids few and very poor. The system had not always been well-served by the succession of records clerks, who in some cases were inadequately trained for a small but sophisticated system.

The Council rolled the problems in the records and archives area together by creating the position of Records and Archives Manager. My appointment to the position was something of a gamble for myself and Council. The Council position offered new challenges, but it should be remembered that at the time of my appointment I had been responsible for the supervision of temporary but not permanent staff, and had never controlled current records. The Council probably wanted someone who had experience at the professional level with records and archives, plus supervisory experience. Probably it was my disposal experience which tipped matters in my favour.

I started with Council in March 1985. One of my first problems I looked at was the Secretarial filing system. As it was used by senior management the need for reform was urgent, and kudos in high places would result from successful reform. The existing system was not salvageable in the long term, and it was tempting to close it off and hope it would go away. I resisted the temptation on two grounds. First we needed access to the information on the files, so something positive had to be done. Second a fear that if I created a new system, my combined inexperience of current records and local

government would result in another bad system. The existing Secretarial system was not finally closed off until December 1986. In the interim I improved the finding aids, obsolete titles were closed and some new ones created. The existing list of file titles was unusable so a new one was created. I also kept a careful check on the work of the records clerk, to bring more consistency to classification and filing. These reforms were time-consuming, but confirmed the need for something more fundamental, and provided valuable information for a new system.

The Secretarial system was not large, as it comprised about 750 subject titles. Its requirements however were sophisticated because it had to handle all the Council's responsibilities, whether finance, works, traffic or planning, as well as new managerial initiatives.

The existing classification system was very badly structured. For approximately 750 file titles there were over 120 subject headings. This was far too many for anyone to obtain a general grasp of the system, a difficulty compounded by the fact that closely related and/or overlapping subjects were scattered through the list, eg. Administration, Archives, Bylaws, Council, Management by Objectives and Results, and Standing Orders were all separate primary subject headings. The numbering was an awkward variation on normal alpha-numeric system

eg. 2041/1 - Advertisements - General
2071/1 - Anniversary Day and Regatta - General
2081/1 - Anzac Day - General

were three successive file titles. The use of four digits for the primary heading meant that the numbers used were difficult to remember, errors due to transposition were increased, and the large gaps between numbers were confusing. Even on its own terms the classification system was not consistently applied.

I decided to cut down drastically the number of primary entry headings to about 25. This meant that anyone using the system could look at one page, and get a good idea of where to start. This

is true for myself and the Records Clerk, and for other staff who have usually been able to find the file title they wanted. The numbering is conventional.

eg. 10/1 - Abattoir - Administration and Policy
14/10/1 - Administration - Advertisements
- Administration and Policy
14/10/2 - Administration - Advertisements
- Routine
14/11 - Administration - Area Offices.

Also the classification system was applied with more consistency.

In developing the new system I examined every file in the existing one, looking primarily at the papers of the previous three years. I asked what new titles would best accommodate the current papers.

One particular feature of the old system was the infamous 'general' file. The use of a single 'general' file for most subjects may have worked years ago when the volume of documents was much less. Today, while still popular, it creates the problem that important papers cannot be found quickly amongst the sheer volume of the less significant and sometimes trivial. I believe the continued frequency of use of 'general' files is due to the inherent difficulty of consistently applying qualitative differences within a subject. Nevertheless I abolished the use of the descriptors 'general' and 'miscellaneous'. To try and divide the old general files both qualitatively and quantitatively in the new system a number of terms were used - administration, policy, capital works, routine, individual cases, newspaper clippings, marketing and legislation. They are used separately or in combination, as needed for each subject. This experiment has been successful, but it is not a panacea. Even with scope notes to explain the use of each term it is not always easy to decide whether particular papers are policy or administration. One recent example was a proposed change in status of the Auckland Town Hall by the Historic Places Trust. I filed the papers on the policy file. Despite such problems the result is I believe a considerable improvement on what happened before.

The physical form of the files was also modernised. The inherited files had been the traditional metal corner-pin in the top left of the file, with a single sheet of stiff paper back and front. The new system used vertically filed, colour coded covers, and a two hole plastic arrangement to hold papers in place. The colour-coding considerably reduced the risk of files being misplaced. The new system resulted in papers being easier to file and easier to use. An unplanned advantage was that the records now looked modern, resulting in a more positive attitude by users.

One of my earliest projects was the development of the "Statement of Records Management and Archives Corporate Policy for the Auckland City Council".³ In general it has stood up fairly well. The experience has been that research for Secretarial and other Council officers, as well as public users of records and archives, has taken more time than was expected, and more than what is, strictly speaking, desirable. The Local Government Official Information and Meetings Act 1987 has not resulted in significantly more enquiries, but the requirement of a statutory deadline for replies has added to the pressure. An unfortunate consequence has been that some valuable but deferrable corporate activities such as forms management have seen little or no progress. In addition, experience has shown that I was extremely optimistic about how long it would take to implement such policies.

Shortly after my arrival I was introduced at a meeting of senior officers. These are held quarterly, and are informational rather than decision-making in purpose. About 44 officers attend. A very general survey of record systems, which I completed by going round the departments and sub-basement area also introduced me to officers at different levels.

This allowed me to select the first areas for disposal work. I didn't survey all Council records in detail, though I appreciate this is the normal recommendation in such circumstances. Instead I tried to restrict specific surveying of existing disposal practices to what I could follow up, and relied for the rest on people coming to me before throwing anything out. To assist progress in the sub-basement area I decided to

ignore an early decision to destroy only by comprehensive disposal schedules in cases of obviously unwanted records that existed in considerable volume. The progress in clearing space has been masked by three factors - departments are moving additional records down from other floors, space on the floor and above shelving cannot be re-used, and further space has been lost as a result of the decision to put pipework for the Aotea Centre through the sub-basement level. The latter development also required moving around many records to provide the space for the pipes, and resulted in a fine coat of dust over everything. The work also took much longer than was expected, for 12 months large areas of the sub-basement were effectively unusable. Had I appreciated how much disruption the work was going to cause, and for how long, I would have given more thought to the idea of moving all the records elsewhere for the duration. In was a classic case of the unexpected disrupting one's plans.

The most interesting disposal project has been building permit records. The difficulty of having very accessible all current building permit plans is common to many local authorities. Microfilm has been widely used to answer the problem. Some local authorities have retained the originals at low-cost storage locations. Cost and volume of records makes this impractical for Auckland City Council. A draft disposal schedule was commented on by a number of people outside Council, and now requires only the classification of a few minor points before being approved.

There tends to be a different understanding of my duties, depending on whether or not you work for the Council. Most outsiders assume I am an Archives Manager, with purely archival duties, most officers regard me as a Records Officer there to assist in the administration of records. Unfortunately the archival responsibilities are made harder as a consequence of the archives being badly scattered. To solve this \$400,000 has been approved for construction of an archives area in the public library, but until this is completed, access to the archives is difficult and only very limited arrangement and description possible, eg. students have produced a list of a large

volume of non-current files held in the Public Library, and the Council's hundreds of minute books are gradually being numbered to archival series and item level.

If I were to review my work to date I would say that it has in general been satisfactory, but in some areas progress has not been all I would like. The Secretarial records system takes more of my time than expected, despite the revised classification system and the appointment of a new and more competent records clerk. Research and report-writing has also taken more of my time than I planned. Worthwhile in itself, it is at the expense of other corporate duties. I have not affected the existing practice of electronic information systems being upgraded independently of reforms to paper systems. I have only made slight progress with the existing practice of departments looking at microforms without regard to what other departments were doing. In short the development of genuine corporate planning of information systems, regardless of form, remains the area that I must devote more time to if my work programme as originally conceived is to be fully carried out.

* * *

References

- 1) This comment is necessarily concerned with a particular period in time, and is not intended as a reflection on the present situation.
- 2) The talk as presented included more detail concerning the background to my appointment, but this can be found in "Local Body Archives and Records Management - The Auckland City Council Experience - the First Six Months", *Archifacts* 1987/1 pp.3-8. I have retained only as much as is necessary for an understanding of the rest of the talk.
- 3) See supplement, *Archifacts* 1985/3, for the full text of the policy.

RECORDS MANAGEMENT JOBS IN BRITAIN ... AFTER A FASHION

by Anne Morddel

Anne Morddel from London, England writes the "Continental Communiqué" section of the American Records Management Quarterly journal.



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So many people have contacted me about the possibility of finding records management work in Britain that it seems time to respond in this column. It seems that a number of people have dreams of relocating to Britain and of selling their records management skills here as easily as they might be sold in North America. Based on much of what I have written over the past three years, this is understandable. The picture I tend to paint is one of ignorance of and indifference to records management or, in the case of some diehards, down right opposition to the very idea of it. It would seem that Britain would welcome some truly qualified and trained records management professionals and that its institutions would be crying out for lecturers. The truth is that there is no particular concern here about the profession at all except from the few frustrated souls who practice it, myself included.

As a bit of an update on previous descriptions of the profession here, it must be confirmed that the profession has grown somewhat. The Records Management Society, founded in 1983, now has over 400 corporate and individual

members; and their meetings average 30 to 50 people attending. The RMS is not in a position to offer a placement service (all of its officers are honorary, and volunteer their time) but it does include advertisements for records management jobs in its "Bulletin", a bi-monthly newsletter. As no recruitment or employment agency seems even to know what records management is (one, when contacted by phone, suggested "sales" as a more reasonable alternative), these irregular advertisements make the "Bulletin" the only sure source of information on whatever jobs are going in the field.

However, what is advertised may not be what North American records managers would expect. A survey of 18 advertisements, taken from the RMS "Bulletin," newspapers and one magazine should give an enlightening picture of what jobs are being offered.

Type of Organisation

Generally, only a big organisation can afford to employ someone to supervise the management of all its information. Of the 18 ads reviewed, five are from multinationals (and four of these are located well outside of London), four are from large companies (1,000 or more employees), two from medium sized companies (500 or more employees), and five from local government or services (such as the fire brigade). One was from a small but international organisation based in The Hague. The multinationals tended to include the usual strong users of records management, such as oil and chemical/pharmaceutical companies, and others included communications, clothing, and property companies.

Descriptions of Records Management

This is telling. Some of the ads show a clear understanding of records management, some are

a bit lopsided, and some are abysmally myopic. Most are suspiciously vague. "Responsible for providing a forward-looking and proactive Information and Library Service, the Information Services Group also maintains and implements the Company's Records Management Programme - an exciting area, still in the early stages of its development, posing many information challenges as the 'electronic office' becomes a reality." This means that somebody in the central library did not want to be pulled away from books and reports into the miasmic gloom of files and computers, so he heard about records management and conned the company into establishing the post. He can then dump all information related work onto the records manager, and never let the programme grow beyond its "early stages of development."

"We recognise the importance of records management. As a result, we have introduced this 'dual' role combining the development of a strategy for our records centre and company archive with the supervision of our Central Administrative Services." That 'dual' role is a dead giveaway that the newcomer will have to bring together two departments that hate each other and are probably competing for the same undervalued territory in a time when companies are cutting the fat.

"Our newly formed Records Management Group [has] embarked upon a comprehensive programme involving development and promotion of a central archive, the creation of a retention schedule and the less traditional elements of Records Management such as forms design and reports management." If these people think of forms and reports management as untraditional, it is a sure bet that this is an archives only job.

The Job Titles

These are generally understandable; records manager, assistant records manager, records analyst (here meaning records manager in charge of all aspects of records management), records centre supervisor or officer, deputy records centre officer. There are a couple or records management executives (meaning lower

than that company's management posts), an assistant archivist, the inevitable information management adviser, and a hopeless "professional." For the most part, the terms mean the same as they do in North America, but the actual scope of application within the organisations is much narrower. They want somebody to take care of either the files or the boxes, but not much more, and certainly nothing along the line of truly proactive or preventative management.

Job Descriptions

Buried under the usual job ads hype of manage and develop, play a leading role, implement the policy, promote, a rewarding challenge, etc., can be found the truth. "You will represent the records management department on various information projects and take part in needs analysis as appropriate" (meaning, you will let the computer department know what the filing clerks are talking about), or "you will control reception, mailing, switchboard, electronic communications and central reprographic facilities" (we're restructuring the administration section and nobody wants these), or "you will apply your information management skills to both computerised and manual systems" (you will be in charge of filing). The worst, for an assistant records manager, sinks to "tasks include listing of semi-current records, inputting data, and separating permanent records."

Those advertising records centre posts are the most honest and appropriate, from "total responsibility for the centre's operations" to "setting up or managing such a facility" (a consultant told us we need it but we're not sure what it is; there are a number that show the same confused victimisation of an organisation by some roving consultant) to "carrying batches of files and records."

Qualifications and Experience Wanted

In comparison with the job titles and expectations, this is ludicrous. Many seem to have settled on "2 to 3 years' experience" as a major qualification. They do not specify what

type of experience. Many also want "supervisory experience" and all want "good communication skills." A depressing number want "keyboard skills," the old "yes, you're a manager, but can you type?" line.

As far as academic qualifications are concerned, not much is required. To be fair, not much is offered in Britain, so there is no point in asking for it. University graduates with a diploma or certificate in archives administration are the normal request, one asks only for 'A' level (high school graduate) standard for a senior post. A popular requirement is "knowledge of records management theory and practice." One wonders if the person interviewing would know what questions to ask to determine such knowledge.

Salaries

From the lowest to the highest, the salaries range from £10,000 to £19,100, with a large majority settling in at £14,000. Most include some health insurance schemes, a company pension scheme, and interest free loans for train/subway travel cards. It usually does not include anything for professional development, not even membership to professional organisations. Some have staff restaurants; those in London offer a special allowance for having to live in such an expensive place. And it is expensive. Those salaries, at the current dollar to pound rate of nearly two to one, may look good, but in real terms are low. Taxes on salaries start at 25% and run up to 30% very quickly. Housing is extremely high, especially in London, with a one bedroom apartment costing around £100,000 for a 99 year lease, or £600 a month to rent. The cost of living is easily double that of most places in North America except New York. To get a good idea of the real value of the salary, simply translate it to dollars without multiplying.

Thus, the average records management job pays, in US terms, about \$14,000. This, for a job with an employer who probably is not sure of what you should do, does not expect you to be a professional, and will try to circumscribe your activities as much as possible.

A Glimmer of Hope

It is this inadequacy that makes the single non-British ad stand out so. It is not a perfect job. The pay is similar to the others, around £19,000. What is remarkable is that these people, without knowing what records management as a profession is, were able to articulate extremely well exactly what they wanted.

"Duties:

- implement and promote information development activities and projects and assess information requirements;
- prepare initiatives and proposals in support of strengthening information management capabilities [in regional offices];
- develop and conduct training of information management staff;
- advise on the outreach activities and services of the reference and documentation unit;
- assist in the organisation of meetings and the establishment of co-operative links [with appropriate external organisations].

Education and Experience:

- university or comparable degree in relevant discipline;
- experience with information management aspects, as related to the provision of operational technical information and to the role of communication in [our] processes;
- at least ten years working experience [in similar type of organisation]
- fluent English, with good French or Spanish.

Personal Characteristics:

- analytical, resourceful and pragmatic, with an eye for broad issues as well as essential details;
- team-worker, with the ability to inspire and maintain good personal relations;
- businesslike yet diplomatic in approach;
- able to communicate effectively both verbally and in writing."

This was the first, and only, ad that I have seen in nearly 10 years in Europe that, in spite of an obvious lack of knowledge of such things as retention schedules and forms management, shows a clear understanding of the problems that records management was intended to solve. Without this precise understanding of the problem, one gets the vague, restrictive, frustrating kinds of jobs as those advertised in the other 17 examples described above.

Records management is growing here, and the profession is receiving some recognition, but it

is a very slow development. The professional training is still lacking, though a couple more library schools now have a records management course or two. The calibre of the professionals is generally much lower than that in North America; and the corporate expectations of records management are phenomenally confused and low. Companies here perceive records management not as a necessity but as a luxurious addition to the filing staff. In the current climate of an economic near depression, it is unlikely that this view will be given the opportunity to change.

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