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Debbie Prout, Chair of the Board, RIM Professionals Australasia

Ensuring the ongoing strength of RIMPA for the future

inForum 2015 was a chance for the RIMPA Board to meet to discuss future directions for the company.

InForum 2015 is all over, but I hope everyone enjoyed the different venue and, as always, the high calibre of speakers that were provided.

I would like to thank all of the sponsors for their continued support of this annual event that gets harder and harder to put on every year. Kristen Keley, our hard-working convention organiser, seems to be able to deliver year after year, and to her and Wendy, who managed our trade exhibition and sponsorship, I wish to give a big thank you. Planning is well underway for Perth in 2016 and Brisbane in 2017, so plan ahead now and book these into your diaries.

GIVING THANKS

During inForum, the RIMPA Board met every day to discuss things such as membership benefits and fees, the CPD program, accreditation and marketing. It was four days of lots of discussion, debate and hopefully results to ensure the ongoing strength of the company for the future. I would like to take this opportunity to thank Kate Walker, our CEO, and my fellow board members Jennifer, Thomas, Lisa, Rebbell, Gerard and Paul for their continued support. As a consequence of these meetings, a number of resources have been developed and issued to branches to assist them with undertaking the duties of branch councils. Please let us know if there are any other things you need assistance with.

At the AGM, I was also pleased to be able to announce that ALIA, ASA and RIMPA have developed a joint accreditation process which will enable educators to participate in one accreditation process instead of three, as was done previously. This new accreditation process is about to be tested with Monash University which is currently putting together its documentation. I would like to thank Adelaide Parr (ASA), Judy Brooker and Sue McKerracher (ALIA) for their commitment and determination through this process.
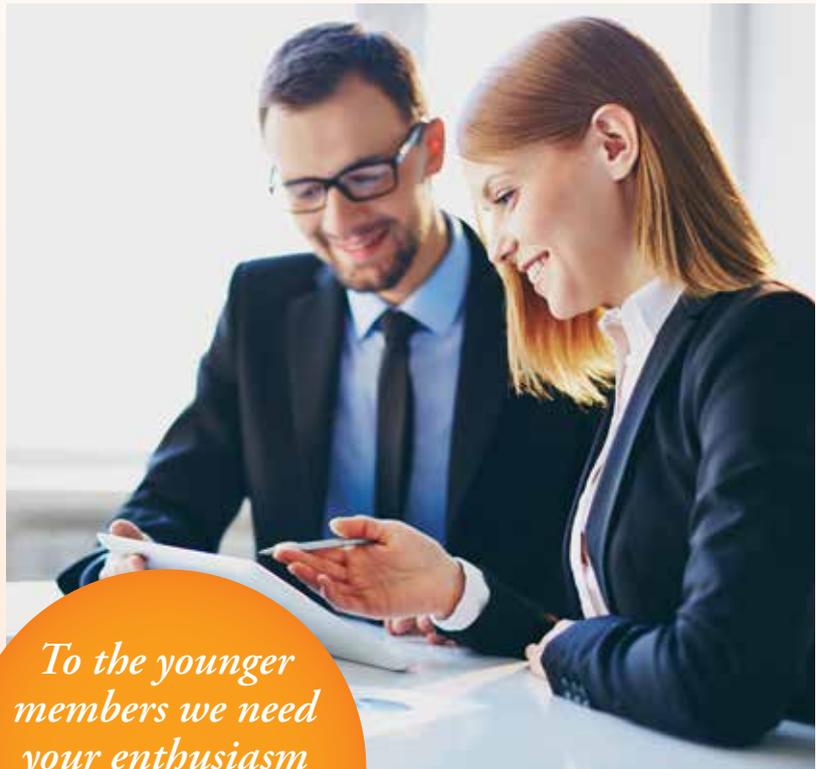
To the younger members we need your enthusiasm and new ideas to help us stay relevant

FUTURE DIRECTIONS

The company needs you – as I mentioned at the AGM during inForum – it's up to you, the members, to ensure that the company continues to stay viable in these challenging times.

As we endeavour to develop new ways in which to communicate with the members and provide them with the tools they need to stay successful in the changing landscape, I ask you all to help us by actively seeking new members and encouraging others to upgrade their status.

To the younger members, we need your enthusiasm and new ideas to help us stay relevant. If you need a mentor or just want someone to talk things through with, then we can help you with this – by getting involved you have the potential to tap into people with vast knowledge of where we have come from and where we are heading.

I would like to wish all members a safe and happy Christmas and all the best for 2016.

Debbie Prout
RIMPA, Chair of the Board

Kate Walker, Chief Executive Officer, RIM Professionals Australasia

Why being a member of RIMPA benefits you – and your RIM colleagues

As members of RIMPA, you are one of the best options to introduce new members. To assist you, here are some suggested words you could communicate to potential new members.

Whether you are interested in strengthening your network, furthering your career or maybe just in need of a few more friends, RIMPA can be a great option for you. In addition to providing information about records and information management (RIM), RIMPA can enhance your personal and professional development and provide endless networking opportunities.

HERE ARE MY TOP 10 REASONS FOR JOINING RIMPA

1 **Broaden your knowledge:** RIMPA offers courses, seminars and/or lectures, webinars, conferences, site visits etc to keep its members up to date on the latest RIM innovations, research and trends. Staying informed on your industry's trends will only help you in the long run and will put you one step ahead of the competition!

2 **Take charge of your career:** Take advantage of career resources. RIMPA has job listings online. This is a great way to find targeted job postings for your area of interest.

3 **Build a better resume:** Listing your RIMPA membership on your resume is impressive to current or future employers as it shows that you are dedicated to staying connected in your profession (especially if you have Professional membership!).

4 **Enhance your network:** We all know that networking is key for the movers and shakers of the community! Making connections is critical, and joining RIMPA gives countless opportunities to connect on a local and even global level. For most people, creating professional relationships is important, and joining RIMPA allows you to have a sense of security and trust. From this, you are able to support and help one another in reaching your professional goals.

5 **Be a leader:** RIMPA gives you an opportunity to develop your skills as a leader, and this is important

not only for your personal growth, but for your growth in your organisation.

6 **Become a mentor:** Giving back can be the greatest reward and benefit. Participating in forums, chat groups or discussion boards sponsored by RIMPA is also a great way to grow your network. This allows you to use your peers as sounding boards and often make some great friends with the same interests as you.

7 **Make a new friend:** Once we graduate, we all know how hard it is to get out and meet new people and make a new friend! Use RIMPA networking groups as an opportunity to escape the norm and meet new people who may give you a reason to come out of your shell a bit more and have fun.

8 **Give back to the community:** Whether it's by assisting on committees, talking to the community, participating in identifying news etc, it is important to continue to give to the community to increase your profession's standing.

9 **Strength in numbers:** We live in a day and age where establishing a presence in any given career field often demands working long hours in the office and bringing work home when the doors close. At the end of the day, you may have ideas for cultivating partnerships, yet not feel up to shouldering all the responsibility to organise them. In RIMPA, you have access to an established support system of experienced people who are motivated to get things done. The battle is half-won!

10 **Stay inspired and stay motivated:** Learn to love what you do! You may not even know that you love something, but it's important to be proactive about things you discover on the journey. Join RIMPA and discover something new TODAY!

Kate Walker
Chief Executive Officer
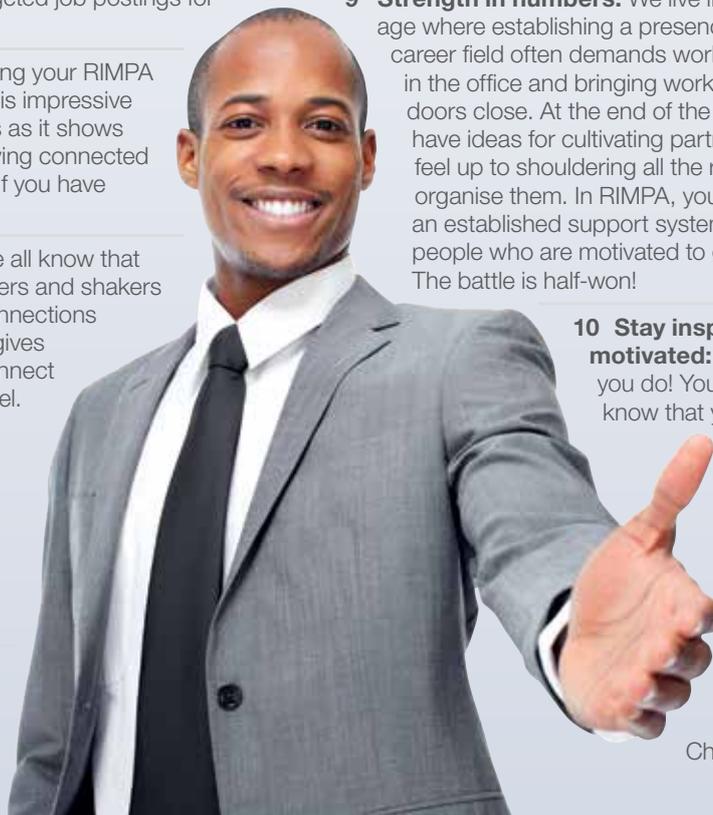
WORLDWIDE NEWS

NZ PM John Key excused official text deletions

New Zealand Prime Minister, John Key, has been excused for deleting text messages from his official cell

NZ Prime Minister, the Rt. Hon. John Key, MP.

Chief Archivist and General Manager, Archives New Zealand: Ms Marilyn Little.

phone because he knew no better. In a report to the NZ Parliament after a nine-month 'review', Chief Archivist Marilyn Little reports that the PM was "not fully aware of his responsibilities" and that advice and support given by officials was "inadequate".

Mr Key, a former foreign exchange dealer and a National Party MP since 2002, is mid-way through his third term as head of government. Ms Little, Chief Archivist and General Manager of Archives NZ since February 2014, was responding to a complaint from a Green Party MP that the text deletions, revealed during last-year's media stouch over leaked documents, contravened the NZ *Public Records Act 2005*.

The Chief Archivist's unprecedented investigation was announced three days before last Christmas. A month earlier, the Government Economic Development Minister, Steven Joyce, had admitted, in answer to a Parliamentary Question, that Mr Key deleted some of the 1,000 messages he received each day, prompting the complaint from MP, James Shaw. Opening of the investigation was reported in the February edition of *iQ*[1].

PM's explanation

The Chief Archivist's review[2], *Managing text messages under the Public Records Act*, reports the Prime Minister's explanation for his actions:

"I receive a large volume of text messages on my cellphone which I routinely delete for security purposes. It is not my practice to conduct substantive ministerial business by text message.

"The vast bulk of text messages I receive in my ministerial capacity relate to minor administrative matters such as transportation arrangements, diary rescheduling or drawing my attention to an email I may need to read."

The Chief Archivist reacts: "Despite the Prime Minister not being made fully aware of his specific responsibilities under the Act, or the use of relevant Disposal Authorities, (his) management of his text messages can be viewed as pragmatic.

"While this may occur for security reasons rather than recordkeeping purposes, the Prime Minister's current approach does not indicate any wilful or negligent disposal of

records without authority. Most text messages are transitory which means their content is already authorised for disposal under (a General Disposal Authority). The Prime Minister's practice therefore appears likely to be compliant with the Act in relation to most text messages."

Agencies to blame

Ms Little blames her own agency, Archives New Zealand, members of the official business group Ministerial and Secretariat Services (MaSS) and the Department of the Prime Minister and Cabinet (DPMC) for "inadequate" advice and support.

The review did not include an attempt to recover deleted text messages, Ms Little says, explaining: "The examination of individual text messages would not result in any improvement of public recordkeeping."

She goes on: "Instead, the Review is forward-looking and focuses on identifying areas where improvements to advice and support will result in better public recordkeeping practices."

The review examined retention of text messages across Government and Ministers and declares: "Improved advice and support must be provided". Ms Little writes:

"I will ensure that the actions that Archives New Zealand needs to take are implemented quickly and comprehensively.

"To ensure the continuing development of good recordkeeping practices, I intend to report specifically on improvements in advice and support services provided to the Prime Minister and other Ministers in my 2015-16 report on the state of recordkeeping within public offices."

> *It found that rather than being isolated incidents, records management failures are systemic, chronic and pervasive*

Report finds systematic recordkeeping failures across Victorian government

Greater emphasis and investment in information management within agencies is critical to avoiding waste and loss of public confidence.

Earlier this year Public Record Office Victoria, in conjunction with Landell, completed a review of the compliance of Victorian Government agencies with their records management obligations prescribed by the *Public Records Act 1973*.

David Brown, Assistant Director Government Services, explained:

"Over the years PROV has observed a significant trend of recordkeeping non-compliance within Government departments, agencies and other Victorian public bodies in our jurisdiction. We commissioned Landell to help investigate if this non-compliance is systematic and what, if any, patterns could be determined regarding instances of non-compliance that had been identified."

The Review examined the 224 reports published by Victorian Auditor-General's Office (VAGO) and the Victorian Ombudsman (VO) between 2010 and 2014. Records management failures were identified in over half of them. It found that rather than being isolated incidents, records management failures are systemic, chronic and pervasive.

VO reports aim to investigate situations where some form of 'wrong-doing' or administrative failure has occurred, or was thought to have occurred. It was therefore expected that some records management failures would be identified in the VO reports. In contrast, it was anticipated that the VAGO audit reports would identify records management failures to a lesser extent, as VAGO audits evaluate government agency performance. However this was not the case. The consistent appearance of records management failures across both sets of reports supports the conclusion that this is a systemic issue, rather than the result of multiple 'one-off' events.

It is clear from this Review that:

◆ There is a pattern of systematic and ongoing records management failures within Victorian Government departments and agencies.

◆ The records management failures hinder investigation by VAGO or VO.

◆ Over the five years considered, at least 54% of reports included some form of records management failure or concern. This figure reached as high as 84% in the most recent year considered (2014).

◆ Almost all Departments appeared more than once over the entire period of review.

◆ Victorian Governments give insufficient regard to the value of information throughout its entire life. This devaluation reduces accountability, lowers public respect, increases costs and lowers productivity.

The Review concluded that recordkeeping failures are an extensive and ongoing concern for Victorian Government departments and agencies.

↻ If you want to know more about the Review, contact standards@prov.vic.gov.au

Source: prov.vic.gov.au/government-recordkeeping/report-finds-systematic-recordkeeping-failures-across-victorian-government

'Dummies' guide and saucy t-shirt for RM

Records management has its world-wide gurus, standards and anxieties. Now the profession's really grown up with its own *RM for Dummies* guide in the familiar uniform yellow and black jacket and a commercially-made t-shirt in a variety of colours with a virile text.

The *Dummies* book is one of the latest in the long, long line of guides to this and that published by the Hoboken, New Jersey, firm J. Wiley and Sons, Inc. It was written by an experienced records manager, Blake Richardson,

a Certified Records Manager, the 'Manager of Records' for the 100-year-old grocery store chain, Safeway, based in Phoenix, Arizona, and a board member of the Arizona Chapter of ARMA International.

He opens the well-written, 300-page beginners' guide[3] with a cheerful, chatty introduction declaring:

"Record keeping and information management isn't a very new concept or discipline. From the moment one cave person grunted to another or scrawled the first picture on the inside of a cave, information and recordkeeping was born. The first cave person felt the need to communicate and keep what we know today to be records.

"Over millions of years, the information grunt has grown not only into structured languages that are spoken but also into an exponential increase in the documentation and transportation of information. Most of this increase has occurred at a staggering rate over the past 15 years. However, if not managed appropriately, you may never realise its true value and someday find yourself in a corner curled up in a foetal position mumbling 'Delete'!

The t-shirts[4], transcribed with the unnerving text "Records manager only because full-time multitasking ninja is not an actual job title", are produced by the US clothiers, SunFrog LLC, of Gaylord, Michigan, which boasts at being "the largest direct to garment t-shirt printing facility in the world".

The shirt comes in nine colours and seven sizes from S to 4X. They obviously grow some very large records managers in the New World.

100 ISO information experts in Wellington next May

Upwards of 100 world experts on information and documentation standards setting will be in Wellington, New Zealand, for a week next May to work with the six subcommittees of an International Standards Organisation technical group, TC46.

It will be the first time the whole of Technical Committee 46 has met in New Zealand though subcommittee SC11, author of the global standard for recordkeeping, ISO15489, worked there in November 2008.

Also meeting in May will be the subcommittees SC4 on technical interoperability, SC8 concerned with quality statistics and performance evaluation, SC9 on identification

▐▐▌ *Bibliography*

1 See "NZ Chief Archivist to inspect PM's text deletions". *iQ*, p. 9-10, Vol 31, issue 1, February 2015,

2 *Managing text messages under the Public Records Act*, Marilyn Little, Archives New Zealand, Wellington, NZ September 2015, http://archives.govt.nz/sites/default/files/managing_text_messages_under_the_public_records_act_-_a_review_by_the_chief_archivist.pdf

3 *Records Management for Dummies*, Blake Richardson, CRM, John Wiley & Sons, Inc, 2012, Hoboken, New Jersey, pp 312, ISBN: 978-1-118-38808-2, Paperback, publisher price: US$42.95, http://au.wiley.com/WileyCDA/WileyTitle/productCd-1118388089.html#, September 2012

4 Records Manager t-shirt, SunFrog LLC, Gaylord, Michigan, nine colours, price US$19.90, https://www.sunfrog.com/RECORDS-MANAGER.html?44018

5 TC46 subcommittee publications: http://www.iso.org/iso/iso_catalogue/catalogue_tc/catalogue_tc_browse.htm?commid=48750

and description and SC10 establishing requirements for document storage and conditions for preservation.

The gathering will run from 9 to 13 May 2016, and focus on the continuing development of many of the dozens of standards for which the subcommittees are responsible[5].

They will cover everything from International archives statistics (SC8), an international library item identifier (SC9) and a data exchange protocol for interoperability and preservation (SC4), SC10's work on management of the environmental conditions for archive and library holdings and SC11's implementation of guidelines for management systems for records.

The big event will begin and end with plenary sessions reviewing overall developments and deciding next steps. During the rest of the week, many large to small meetings of working groups will develop specific projects, review and improve draft texts. The meetings will not be public events, but interested parties will be able to seek admission as observers.

Venues for the meetings have yet to be settled. Technical Committee 46 officials hope to hold a public one-day seminar or a number of smaller focus groups to allow the professions to meet and hear representatives of the subcommittees.

⊃ For more information contact: Andrea McIntosh, Andrea.McIntosh@wdc.govt.nz

Indian century-old diaries inspire email search tool

Handsome hand-written diaries of a 19th-century Indian high-school principal … "something of the Samuel Pepys of Southern Asia" … have helped recordkeepers around the world accessing details in email data silos. Software engineer Sudheendra Hangal found the diaries in a family trunk and began wondering how his own ancestors a hundred years from now would be looking up family lives.

Dr Sudheendra Hangal, PhD, Associate Professor of Practice in Computer Science, Ashoka University, New Delhi, India.

Emails seemed the inevitable digital legacy although organising and sifting years of messages would be laborious. In an interview in the *Wall Street Journal*[6], Mr Hangal said the idea "sort of fermented" in the back of his mind for a number of years until, in 2007, he began study for a doctorate in computer science at Stanford University, California. He realised it could be the topic for his dissertation.

"Neither I nor my adviser really knew very much about this area," Mr Hangal, today a professor at Ashoka University, New Delhi, told the *WSJ*. "The idea of personal digital archives and software to manage them was very new."

At Stanford, he went on to develop an application he named *Muse* (Memories Using Email). The program caught the eye of digital archivists on campus who were grappling with more than 150,000 emails in the archive of US poet and author, Robert Creeley.

Stanford develops ePADD

Starting with *Muse*, a team at Stanford University Libraries developed an open-source software program to manage email archives. They released the free software package called ePADD[7], in September.

The *WSJ* reported that the software could search emails with queries ranging from a single word to an entire manuscript. It revealed connections and networks among correspondents and recognised an individual's different email addresses as well as displaying attachments without opening messages.

ePADD user Kate Tasker, a digital archivist at the University of California, Berkeley, declared that the tool would "change the way that I'm able to process email collections". She said: "It's going to automate a lot of the tasks. It's going to recognise a lot of the types of information that we need to review before making email collections available."

Meanwhile, Mr Hangal, the computer-science professor, is already musing about the next challenge. "Email is just the beginning," he said. "There are so many other digital files, such as Twitter messages and Facebook posts, that might be much harder to organise than email."

Melbourne's Greek Archive celebrates

Melbourne's Dardalis Archives, the La Trobe University record of Greek migration to Australia, is celebrating the halfway mark of its project to list its vast collection of newspapers, books, diaries, scrapbooks, films, music scores, posters, photographs, newsreels and costumes. The material, stored in hundreds of boxes, gives insight into the 130-year history of the Hellenic diaspora in Australia.

An exhibition entitled 'Halfway Through' marking the 200,000 items so far listed, runs at the La Trobe's Bundoora campus until 5 December[8]. Melbourne boasts the largest Greek population in the world outside of Greece.

The bulk of the material is in English or Greek, some in Arabic, French and German. Australia's largest Greek-language newspaper, *Neos Kosmos*, described the collection as showing "the symbolic and physical journey undertaken by thousands of Greeks to Australia and their integration with Australian society".

The newspaper reported Professor Chris Mackie, Chair of the university's Archive Committee, confirming that the bilingual appraisal team consisting of academics and historians in the Victorian Greek community, was ahead of its three-and-a-half year schedule to complete the process of categorising the items.

Dardalis Archives holdings

📊 *Bibliography*

6 "New Email Archive Tool to Sift Literary Legacies", *Wall Street Journal,* July 29,2015. http://www.wsj.com/articles/new-email-archive-tool-to-sift-literary-legacies-1438194059

7 ePADD software package, Special Collections and University Archives, Stanford University Libraries, CA. https://library.stanford.edu/projects/epadd.

8 Dardalis Archives contents listings thus far online at www.lib.latrobe.edu.au/greek-archives.

Professor Mackie was particularly interested in the newspaper collection, He said: "Modern Greek is taught at La Trobe and we want to see this archive used for research. I can imagine research being done, particularly in Modern Greek studies, on the origins of the community."

Last of the giant repositories for NAA

Construction has begun on the National Archives of Australia's huge preservation and storage facility at Mitchell, ACT. And David Fricker, National Archives director-general, says there'll probably never be need for another like it.

He told the *Canberra Times*: "The business of the Commonwealth government now is done digitally so most of our most important records will be preserved in their digital form.

NAA Director General
David Fricker

"Across Australia, the National Archives has approximately 380 shelf kilometres already in our care. Right now, in the care of the state departments, we have another 160 shelf kilometres which we know already exist and are coming our way to be preserved.

"We're spending every dollar we have as wisely as we can to ensure the analogue records are properly preserved but we cannot keep building more and more buildings for greater amounts of paper. It's the digital age and we have to be an archive for the future."

Mr Fricker said that technology became obsolete but the information was immortal. "We will always preserve iconic records that are part of our documentary history of Australia but we're looking ahead to the future," he told the *Times*.

The 18,000 square-metre facility will include a conservation laboratory, digital archives for classified and unclassified records, cold storage areas and 114 kilometres of shelving, enough to stretch from Canberra south to the New South Wales ski-town of Cooma, "the Gateway to the Snowy Mountains".

It will house around 10 million Commonwealth records after it opens in 2017. ❖

CONTACT US ✉ If you have any news stories for *iQ*, please contact editor.iq@rimpa.com.au

ARM figureheads jab the professional conscience for oppressed 'non-citizens'

Two leading international identities in archives and record management have jabbed at, not just pricked, the conscience of the profession in keynote speeches on the goals of social equality and openness for global citizens undocumented in the digital information management world.

By **Mike Steemson**

Dr Anne Gilliland, Professor and Director of the Archival Studies faculty at the Center for Digital Humanities of the University of California, Los Angeles, and Dr Verne Harris, Director of Research and Archives at the Nelson Mandela Foundation, Johannesburg, demanded action from IM practitioners to "reckon substantively with human rights exigencies", get into "archival banditry", become "memory bandits".

They were speaking at the 2015 annual conference of the Archives and Records Association of NZ, *Footprints in Space and Time*, in Auckland in September.

Dr Gilliland highlighted 21st century recordkeeping concerns and technologies integral to the "societal grand challenges" of forced displacement and migration facing communities around the globe. She declared:

"Recordkeeping is inextricably linked to the causes and digital, policy and educational mechanisms for addressing certain aspects of the challenges. These linkages are significantly under-explored and under-addressed in our field."

She argued: "Archives and recordkeepers have social and ethical responsibilities toward those individuals who are least empowered to engage with official records and recordkeeping practices or to maintain their own records. Responding will require implementing archival and recordkeeping practices and policy at *supra*-national and *meta*-archival levels."

She saw the "networked society" already doing some of the job, linking many traces of human social activity, framing fuller representations of identity by capturing more facets of public life than official records ever could. The critical issue was the equity and ethics of accessibility and the rights of the people whose presence in the records was unacknowledged.

Dr Anne Gilliland, Director, Archival Studies faculty, Center for Digital Humanities, University of California, Los Angeles.

CALL FOR 'PROACTIVE ACTION'

Dr Gilliland insisted: "We must not leave this kind of archival work purely to the serendipities, idiosyncrasies and profit-making, intelligence-gathering and other self-interested strategies of those who develop, control or exploit networked technologies and social media. The people whom we have traditionally underserved and miss-served not only deserve it, they need more deliberate and proactive action than that."

Dr Gilliland drew attention to UNESCO's 2011 Universal Declaration on Archives requiring "the diversity of archives in recording every area of human activity". She commented: "We, the archival and recordkeeping community collectively, have actually failed miserably in these respects. We do not record every area of human activity, at least not deliberately, and we do not protect all citizens' rights, certainly not to an equal or even equitable extent."

She protested that "within our archival fiefdoms and silos, our appraisal policies are designed to support only the records and collective memory needs of a deliberately selective and institutionally resourced sliver of human activities". She went on:

"We fail so-called 'non-citizens' who are officially and popularly categorised in all sorts of exclusionary euphemistic and legalistic ways that each serve to make them 'irregular' and push them off the archival radar: migrants, refugees, the displaced, the undocumented.

"We should not just be contemplating the general liberation of the archives. We should be doing so with a specific aim to enfranchise and recognise the rights and needs of those whom archives and their principles have systematically failed or disempowered: those millions of individuals fleeing countries in so many parts of the world whose desperate faces we are seeing daily in the media.

"And we should be doing so not only through traditional archival institutions but also by creating new non-institutionally aligned archival and recordkeeping roles and spaces.

"We must confront our own complicity in these events and effects, and fundamentally re-examine, re-think, speak and step up if we are going to live up to what the Universal Declaration so stalwartly declares."

The critical issue was the equity and ethics of accessibility and the rights of the people whose presence in the records was unacknowledged

record. But you will be haunted by the absence of the digital record. I need not spell out the implications for the voicing of this past."

His direct action he called 'archive banditry'. He proposed: "This is not easy work. It requires courage and imagination. It demands the closest reading of archive, with the grain and against the grain. And it is, most often, resisted by structures and systems of power. Attending to them is readily seen by these structures and systems to be subversive.

"Arguably it is subversive. It questions everything. It tends to disturb dominant narratives. It diverts energy, time and resources from what is seen to be core business. And it allows what is regarded as personal into the 'professional'. Dangerous space.

"It will unavoidably involve, to some degree, what I am calling archive banditry: a determination to shape our professional work in a relation of hospitality to the voices that press in upon us from outside the structures and systems which we benefit from. Memory bandits.

"Not the ones which convention tells us are lawless. Rather, the ones who honour justice as a law for practice which trumps the laws which *polities* pass to protect their interests; the ones who honour footprints rather than the biggest and strongest feet in their jurisdiction; the ones who will not be bought, or simply go away; the ones who believe in a human project that is about liberation rather than depredation, isolation and oblivion." ❖

HARRIS SEEKS 'ARCHIVE BANDITRY'

Verne Harris is himself a student of opposition since the days of the crusade against South African apartheid. He was President Mandela's official archivist and helped found the world-famous Nelson Mandela Foundation. He too called for direct action.

He outlined digital recordkeeping processes in South Africa since the 1990s, the release from prison of Nelson Mandela, the four years of transition from apartheid to democracy during which 15,000 people died in political violence. He said: "You can easily be overwhelmed by the scope and volume of the paper

Dr Verne Harris, Director of Research and Archives at the Nelson Mandela Foundation, Johannesburg.

ABOUT THE AUTHOR

Former London newspaperman Michael Steemson, ARIM, is the principal of the Calderson Consultancy in Wellington New Zealand and a member of the editorial board of *iQ*.
✉ He can be contacted at mike.steemson@xtra.co.nz

NOTHING IS AGREED YET – WE CAN STILL STOP THE TPP'S COPYRIGHT TRAP

Trade negotiators have a saying – that nothing is agreed until everything is agreed. What this means is that, despite all of the deals that have been struck in the Trans-Pacific Partnership (TPP) negotiations so far, they remain tentative until each country signs off on the final agreement. A consequence of this is that no matter how far advanced the parties are towards agreeing on repressive copyright rules, it is still not too late for them to turn back.

By **Jeremy Malcolm**

That's why Electronic Frontier Foundation continues to call on TPP officials to renounce misguided plans to extend the length of copyright by 20 years in half of the 12 TPP-negotiating countries. This is despite the seeming inevitability of this extension – it has been included in all US free trade agreements after the North American Free Trade Agreement. There have been repeated reports that little to no opposition to it remains amongst the negotiating countries.

Even so, we can't simply sit back and accept this, because what's wrong is wrong. Even the Office of the United States Trade Representative (USTR) that has been hell-bent on pushing this change cannot be unaware that this places them at odds with almost all economists[1]. That's because copyright term extension has never been about economics, it has been about placating a big content sector that takes pride in its ability to demand, and to receive, copyright laws that benefit nobody but themselves.

BIG CONTENT THROWS HISSY FIT

Big content threw a hissy fit over the proposal of slightly more liberal language on copyright exceptions during last month's negotiations. This was not because this damaged their interests – on the contrary, creators depend upon fair use as much as anyone. Rather, because it marked a slip in their control over a US government agency that they are used to manipulating like a puppet (partly by offering plum jobs to USTR staff who toe the line[2]). We can only imagine how much more incensed big content lobbyists will be if their demand for Pacific-wide copyright term extension is rejected.

Over the past few weeks, we have heard from experts in four of the six TPP countries that may be forced to extend their copyright terms by 20 years under the TPP. They have spoken with one voice about how harmful this change will be for their citizens:

Professor Michael Geist of Canada sounded a warning[3] about the potential for the TPP to eviscerate many of the reforms found in Canada's new copyright law, despite the lack of any public consultation over changes that would upset these finely balanced domestic policies. Further perspectives from Canada were contributed by filmmakers Andrew Hunter[4] and Brett Gaylor[5].

We heard from Malaysian entrepreneur Shawn Tan[6], in a piece that the local press also picked up about how the extension of Malaysia's copyright term would lock up materials from the country's early history, while doing nothing for high-tech innovators who are finding more value in open collaboration than copyright monopolies.

In Japan, consumer policy expert Martin Frid[7] described how the Japanese government is aligned with the US against local creators and fans, threatening their ability to bring historical plays and the characters they love from anime and manga, to life through theatre, costume, and fan art.

Finally (for now) economist Eric Crampton[8] from New Zealand, taking the rightsholders' argument to the extreme, asks why copyright should not be infinite? He explains that longer copyright terms impose a disproportionate cost on the creation of new works, leading to an impoverished global cultural commons.

We also heard cautionary tales from Jamaica and South Africa about how the copyright trap is never-ending: it has been well-described as a ratchet that goes up, but never down. Today it's life plus 50 years, tomorrow life plus 70, then life plus 95, or 100, or… forever. Since the public domain ought to provide a rich and diverse pool of works that constitutes our shared cultural heritage, every year that is stolen from it tightens the straightjacket of those who depend upon accessing it.

It's not just about protecting the interests of users and creativity, either. It's also a dollars-and-cents argument for the countries concerned. Do the math: in a country like Malaysia, where less than 20% of music consumed is locally produced[9], that means that over 80% of the music royalties paid during the extended copyright term will be headed overseas with a negligible amount received in return. Similar figures apply to other countries and other cultural sectors.

This makes it obvious why, if not for the leverage of offering them more favourable terms for trade in their manufactured and agricultural goods, the United States Trade Representative (USTR) would not have a leg to stand on in its demands that other countries adopt a costly extension to their copyright term.

So we won't be giving up this fight and neither should those countries. Either we'll convince them to reject the unwarranted extension of the copyright term by 20 years, or we'll have given them fair warning: if they press ahead and include this term in the agreement regardless of the public's wishes, we will together rise up and defeat the TPP as a whole, just as we defeated the Anti-Counterfeiting Trade Agreement[10] and the Stop Online Piracy Act[11] before it. ❖

⟳ This article was first published by Electronic Frontier Foundation: eff.org/deeplinks/2015/08/nothing-agreed-yet-we-can-still-stop-tpps-copyright-trap

> *…we have heard from experts in four of the six TPP countries that may be forced to extend their copyright terms by 20 years under the TPP*

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ENERGISE COMPLIANCE BY CHANGING THE ATTITUDE

Some corporate cultures have allowed workers to believe that their time is too valuable to be spent managing records – it's time to change that attitude.

By **Craig Grimestad**

As noted last issue (Psychology of RIM – 'Energise compliance with motivation and training', *iQ* August 2015), information governance (IG) and records management initiatives often stall when it comes to full compliance for individuals at the desktop level. Motivation and training are most helpful, but not alone in energising compliance. Compliance is also energised with a positive workforce attitude toward managing records.

WORKPLACE INDUCED ATTITUDES

Certainly there are priorities for work activities, and activities supporting the customer experience (especially those with customer required deadlines) are at the top of the list. No one is suggesting that deadlines be missed or customers be disappointed because time is taken to manage one's records. But for many companies the priority for managing records approaches zero. Sadly, many corporate cultures

have allowed workers to believe that their time is too valuable to be spent managing records. They shouldn't be bothered to create, organise, store, or dispose of records in a prescribed way, even if they created the records. Their supervisor never asks if they are up to date in managing their records, or if they need time to organise and/or dispose of records. It is as if managing records is not a part of their job.

Perhaps inadvertently, corporate leadership confirms that perspective by not providing communications and/or training on records management. The workforce needs to be told that records are corporate assets and that the creation, maintenance, and disposal of records (according to the Records Retention Schedule) is a necessity. The workforce needs to be told that managing records is a worthy and expected part of each worker's job, and needs to be accomplished in a timely manner.

Corporate messaging and training are commonly provided for the following:

- ◆ Anti-discrimination
- ◆ Affirmative action
- ◆ Substance abuse
- ◆ Code of conduct
- ◆ Conflict of interest
- ◆ Sexual harassment
- ◆ Security
- ◆ Workplace violence
- ◆ Privacy

What are workers supposed to think when they get communications and training for these, but silence for records management? The message received is that managing records is not a corporate priority, and maybe is not even a requirement.

Oh, but Privacy is the law, you have to train the workforce for that! Agreed – **but so is records management**! There are thousands of federal and local governmental statutes and regulatory requirements that require companies to keep specific records for a required period of time. Companies can be fined and individuals held accountable for not complying with these laws.

Companies would do well to elevate the respect given records. Records viewed as common are actually the lifeblood of the company – nothing moves, nothing happens without them. Records viewed as special – such as patents, copyrights, and designs – are what set the company apart from its competitors. Visibly esteeming records and their management will create a positive workplace environment and energise compliance.

WORKER FORMED ATTITUDES

On a personal level, individuals would do well to develop a positive attitude towards the creation and management of records. After all, one's value to the company isn't measured with good looks, wit and charm, but with one's performance with records.

Do you create records? A record creator's performance and accomplishments are identified and measured by the records created or contributed to, whether an invention, an analysis, a sale, a presentation, or something else. Your contribution to the company is found in your creative genius, coupled with your ability to clearly communicate and record your creation into the understanding and usability of others.

Do you process records? Do you transfer information from one realm to another, providing interpretation or assuring clarity of content? You have a vital role in the efficient operation of the company and your good work enables others to

Companies would do well to elevate the respect given records

perform at their best. If you don't already, consider developing a measure of your contribution, likely including volume, accuracy, and the value of the activity enabled for others.

Do you hold records? Do you retain, store, and protect records? Do you provide easy access of these records to those who need them, and protect the records from the elements, possible disasters, and those who have no business accessing them? Do you dispose of those records, and only those records, that have completed their useful life for the company? Your diligent work has high value to a company, although typically taken for granted until there is a failure.

Individuals would do well to have their own positive attitude toward records and records management, viewing performance with records as an opportunity to showcase one's value to the company, demonstrating knowledge, wisdom, and skill.

Establishing a positive attitude toward records should be both a corporate and a personal priority:

- ◆ For the company, the cost, or more correctly, the investment, is small, and the rewards are great. Can you afford not to instil a positive attitude?

- ◆ For the individual, one's records, and performance with records, is a major component in determining how the company will recognise and reward your contribution. Don't you want maximum recognition? ❖

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FOUR STRATEGIES TO RENEW YOUR CAREER PASSION

The author of the best-selling book *Emotional Intelligence* writes here about how to reignite your passion and develop your leadership skills.

By **Daniel Goleman**

The search for personal meaning can be an ongoing quest. It's a difficult process but it usually results in a very healthy and necessary awakening. Leaders, for example, need to work on this regularly in order to replenish their energy, solidify their commitment, heighten their creativity, and rediscover their passion. **But they cannot do so without first re-calibrating to focus on their goals and dreams.**

Certain signals can trigger the need to take stock or adjust your perspective. Examples of these signals are feeling trapped, feeling bored, feeling like life is passing you by, or that your personal ethics have been compromised. Or maybe you just don't feel like yourself. **So how do you train yourself to recognise these symptoms of distress and take action before it's too late?** In my experience, it really takes a concerted effort to self-examine on a regular basis.

Unfortunately, there isn't a quick solution for reestablishing meaning in your career. But there are some very effective strategies for examining your decisions and adjusting your trajectory where appropriate. Many people use a few combinations of these strategies, some seek help from others, and some prefer to go it alone. However you choose to undertake these methods, remember to take it slow. You'll need time to reflect, consider where you are, where you're headed, and where you really would like to be. Let's take a look at four ways to do this.

1 TAKE A TIME-OUT

Taking some time off is a great way to figure out what you really want to do. It gives you a chance to reconnect with your aspirations. Sabbaticals are a common occurrence in academic institutions, typically offering faculty members six to 12 months off – often with pay. Because this is less common in business settings, those who do so are taking a risk, to be sure. But in my experience, few regret the decision.

Do you think this is right for you? First imagine: no to-do lists, no meetings, no structure. This can be quite difficult; most high achievers crave routine. Additionally, what about the loss of financial security? This is often prohibitive. And then there's your identity in your work role. For some people, abandoning their station feels like too great a sacrifice. It's a decision that needs to be made with great care and careful planning.

2 FIND A PROGRAM

If a more structured scenario would suit you better, consider a leadership or executive development program. These offer guided settings for people as they explore their dreams.

Take a long-time executive of several health care organisations. For a change, he began teaching part-time. He maintained his position at work, even as his course load grew rapidly. But he was becoming exhausted. It wasn't until he enrolled in a professional development program that he was able to design his ideal future. It became clear to him and his coach that he had a powerful calling to teach. Teaching was not just a diversion; it was his dream. So he developed a two-year plan for disentangling himself from his business role, and now he's full-time faculty.

It's common for educational institutions to offer these kinds of programs. And some progressive companies have also decided that these programs are worth it, as they result in a rejuvenated, reinvigorated team. The risk to the company, of course, is that participants won't return. Fortunately for them, it's more common that these employees return with new meaning and excitement. Either way, it's important to remember that those who jump ship would have done so regardless.
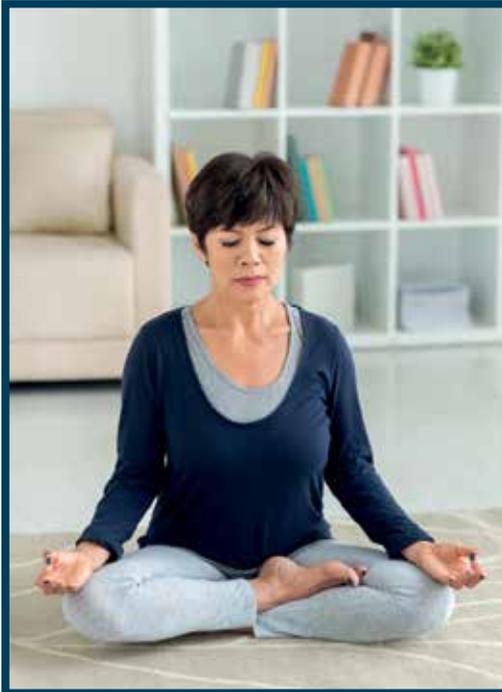
3 CREATE 'REFLECTIVE STRUCTURES'

When the late leadership guru Warren Bennis conducted a survey of leaders in the early 1990s, he discovered a common trait: their ability to remain in touch with what mattered to them. They created space in their lives for what he called 'reflective structures', meaning they allowed themselves the time for self-examination on a regular basis.

Many people rely on meditation, prayer, exercise, or simple reflection as their outlet. One CEO reflects in solitude for an hour a day, and sometimes two or three hours on weekends. However you choose to do this, the goal is to separate yourself from everyday demands and just be with your thoughts.

There are also ways to reflect collectively, so that you can share your ambitions and disappointments with peers. After overseeing multiple divisions of his consulting firm, one executive decided to share his experience by joining a CEO group that met monthly. By joining a group like this, you've legitimised the importance of examining your role and learning from others. The benefits are quickly tangible; members exchange proven effective tips for the difficult situations and conflicts they all have in common. (It also creates a space for honest feedback – something most executives don't hear much of!)

4 WORK WITH A COACH OR MENTOR

When we're in a confusing situation, disregarding our past experience to arrive at an objective stance is very difficult. Perhaps impossible. An outside perspective is extremely useful in this way. You might seek help from trusted colleagues, but it may be in your best interest to consult with a professional coach. Coaches are trained to help you identify your strengths and determine the best ways to use them.

You may also be fortunate enough to work with a manager who possesses a coaching leadership style. Coaching leaders help employees identify their unique strengths and weaknesses and tie them to their personal and career aspirations. They encourage employees to establish long-term development goals and help them conceptualise a plan for attaining them. They make agreements with their employees about their role and responsibilities in enacting development plans, and they give plentiful instruction and feedback. ❖

This article was first published at www.danielgoleman.info/daniel-goleman-four-strategies-to-renew-your-career-passion/

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Daniel Goleman is an internationally known psychologist who lectures frequently to professional groups, business audiences, and on college campuses. As a science journalist Goleman reported on the brain and behavioral sciences for *The New York Times* for many years. His 1995 book, *Emotional Intelligence* was on *The New York Times* bestseller list for a year-and-a-half. Goleman has also written books on topics including self-deception, creativity, transparency, meditation, social and emotional learning, ecoliteracy and the ecological crisis. His book, *Leadership: The Power of Emotional Intelligence*, offers an up-to-date summary of his thinking on leadership by collecting key excerpts from his books together for the first time in one volume with his articles from the *Harvard Business Review*. These include 'What Makes a Leader?' and 'Leadership that Gets Results'.
↪ See more of Daniel's work at www.danielgoleman.info.

Smoothing the path of true love: Are we working effectively with our businesses?

The work of professional records management covers not only the role of the records management team, but a host of other staff, including the non-professional record 'officer' or 'champion' role. Looking critically at what we do and how we do it could lead to small changes that might have a positive impact on those we work with: smoothing the path of true love between good records management and happy, effective businesses.

By **Vanessa Platt**

What defines a 'record-keeping professional'? From a student's perspective – my own – this question appears as a perennial one: it seems to have been the theme of a spate of my recent lectures and seminars. I recall one of these 'concluding' that the existence and essential needs of the 'record' remain paramount to our work, and the 'record-keeping professional' ministers to its authenticity, integrity, reliability and usability needs at every stage of its corporate life. The record here, in effect, is the 'baby in the barn' of the 'record-keeping professional', swathed in rather fuzzy and fluffy but undoubtedly secure swaddling bands – and put down with maternal affection

(and relief) for a long nap. Maintaining 'the record' at all costs seems to constitute the all-encompassing mantra for our existence. It is worth, I think, reflecting for a moment on whether by focusing so intently on the record itself, and rather taking for granted those who create and administer it, we may be in danger of throwing out our precious baby with the proverbial bathwater.

Looking back on my own foray into the field of records management (and wondering at the same time why I describe it as though it were a military offensive), I note that the work of professional records management covers not only the role of the records management (RM) team, but a host of other

staff. In an environment where good records management was recognised, desired and even promoted by the powers that be, the RM team saw its endeavour as grander than a mere 'occupational grouping', our enterprise as greater than the sum of its parts. As do many others, we used the help of staff within office teams 'on the ground' to implement and embed an organisation-wide EDRMS.[1] Much as the 'paperless office' now appears an idealistic aspiration, so too the proposed love affair between business staff and records management can seem more the result of a blind date – or at least some carefully-crafted relationship counselling sessions – than a match made in heaven. Coaxing staff to buy into a new way of working included spreading the mantra in person, policy document and promotional leaflet that 'The responsibility and benefits of managing your records are YOURS'.

Record officers, however – elected by their managers to do a job the managers don't even fully understand – often received no such coaxing. This engagement of a member of staff was not so much a specifically designed tactic and more a product of necessity born out of the nature of the task: RM teams require a means to problem-solve, positively promote good practice and be generally 'visible' at a localised level through these individuals. In a large organisation such staff are indispensable, and keen and willing advocates are like gold dust – but these are not common. It is the effect of this practice – used in organisations where good records management is, by all appearances, thriving – that is potentially detrimental to the genuine championing and effective take-up of RM in our businesses.

we need to keep a handle on precisely what it is records professionals do that is unique and valuable, and how we communicate this to others, explicitly or otherwise

story snapshot

The inspiration for this reflection springs from my time as part of an uncommonly large records management team with an uncommonly advanced EDRM program. Looking back on this experience with a critical, academia-tinted gaze has led me to question an often-overlooked element of our organisational practice: the non-professional record 'officer' or 'champion' role. Our creation and use of this role, in my opinion, suggests a disconnect between what we, as records managers, want to achieve in our organisations, and how we go about doing it. This in turn could constitute a significant challenge to the identity and reputation of professional records management in business today. Ironically, it is the determination to achieve good records management as a business-as-usual activity that has played a large part in creating this challenge. We may, at times, be working against our best interests. Vanessa Platt

RECOGNISING RM AS CORE FUNCTION

Our sector seeks recognition for records management as a core function and a unique profession in the eyes of employers, aptly evidenced by the recent ARA *Don't Risk It!* campaign. The RM fundamentals – records surveying, classification, access control, retention scheduling, appraisal, disposal, communications, training and advocacy – all reflect the unique need for the work of qualified practitioners to reach not only up to the highest and broadest levels of management, but also down to the essential end-user-managed functions and processes that give birth to 'records' every minute of the working day.

However, it is arguable that records professionals are not uniquely placed to fulfil this all-encompassing role. The fact that a qualification is not 'essential' facilitates, in an employer's market, a space for the professional development of others who may be qualified in all manner of different areas, but who *also* have the basic skills to manage records. Ismail and Jamaludin have commented astutely on the situation in Malaysia, where records management is an 'invisible profession'.[2] In this country, practitioners – who are often poorly positioned in or entirely absent from major national organisations – have their roles filled by others and do not have the capacity or leverage to apply processes at key points in the record's existence, so any potentially meaningful results from their custodianship are not evident to the company. Certain insights from their article are, I believe, helpfully extrapolated beyond the Malaysian experience and provide a necessary critique of how we do things in the UK.

As in the large majority of Malaysian businesses, a significant proportion of large public and private organisations in the UK *who do not employ qualified records managers* are, nevertheless, interested in managing their 'corporate information' and 'data assets' in some fashion, whether their primary function be delivering a public service, conducting research, developing bespoke solutions for clients, distributing humanitarian aid, or pursuing a profit. In the above category of large companies, it is likely that the role and functions of records management lie with either the administrators for paper-based records or the information technology (IT) personnel for electronic records. The administrator could either be an accountant, auditor, or legal advisor by qualification, and the IT personnel are mostly from a computer science and IT education background.[3]

Ismail and Jamaludin pick out the multi-skilled professional as the default option for holding RM responsibility in the average (and, we would perhaps add, unenlightened) private or public organisation. That an employer may require a health care analyst or an industrial engineer and expect them to have the skills to 'manage information' or records as part of their role is, today, seen as a very reasonable requirement – if not a given – and I personally have been astonished by how many job descriptions including such a requirement can be found from a fairly cursory internet search.

THE RISKS OF CREATING UNOFFICIAL RM SUPPORT STAFF

In view of this, I find it surprising that, in organisational contexts where a professional RM function has a healthy and well-established profile, the creation and fostering of a group of employees as RM-skilled end-users is pursued *by the RM team* in a disturbingly similar way to that in which businesses where records management has a low or non-existent profile hire employees who can also perform basic RM tasks in addition to their primary role. In either case, the benefits from any kind of records management risk being watered-down by an un-incentivised, disinterested and potentially unskilled workforce. And, in the former case, if those who are made the 'go-to' individuals with regard to immediate RM queries lack confidence, interest or an incentive to learn, such queries inevitably rebound on the busy RM team; issues take longer to rectify; work progress is hindered, and staff belief in the practical benefits of records management risks being shaken or quashed altogether. Creating unofficial support staff in this way can further imply that the RM function is already well-embedded in an organisation and that RM teams are seen as resting on their laurels. Gaining records officers should at the very least signal the *start* of a dynamic business-as-usual strategy, rather than a sign of records management having already achieved sufficient prominence and success. Overall,

there is a danger of the idea being perpetuated that records management is not a core business function.

It is further worth noting that the total absorption of ICT and digital business processes into contemporary life has already universalised the concept of 'information management' in our lives, both personal and business, and that the increasingly intangible, fluid and pervasive nature of 'information' in the digital age requires practical management processes of some kind has become a self-evident truth for businesses today in a paper-to-digital shift that involves all staff. As a former 'record officer' observed to me recently:

Everyone could do filing. We were good at shelves. Then records management and [the EDRMS] came along and some said 'This is just filing!', but digital records management required a change of mind-set for everyone, knowing we couldn't keep everything anymore.[4]

'Information management', as Geoffrey Yeo observed in his recent Jenkinson lecture at UCL, has also crept into the lexis and mind-set of records and archives management. To my mind, this is understandable, if purely on a superficial level, since we wish to emphasise the value of our work, and employing the language of those you wish to persuade is generally a good tactic. As Yeo excellently drove home, however, we need to keep a handle on precisely *what it is* records professionals *do* that is unique and valuable, and how we communicate this to others, explicitly or otherwise.

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STAFF DOING RM: 3 TYPES

At present, there appear to be three kinds of people who do records management in our businesses:

◆ **Trained records managers**, employed by organisations that apparently recognise the profession and the skills that come with experience and a professional qualification in information management.

◆ **The skilled specialist in another areas**, such as the IT technician or engineer, who is also expected to have a good grasp of information management skills – enough to apply their own initiative and judgement in most situations, to the satisfaction of their employer, but without the backup of a professional records management team.

◆ **Non-professional support staff** trained by professional RM staff to promulgate good practice and be the first line of enquiry and defence against an otherwise endless stream of user queries and EDRMS issues. Like the *skilled specialist* above, this category of RM practitioners receive their RM tasks on top of their everyday role.

In the latter category, the risk is that staff feeling burdened with additional duties not part of their job description act as RM advocates in name only. The real picture isn't as gloomy as this implies, however. The formal presence of RM responsibility in job descriptions for staff outside the core RM team is a reality in some organisations. From speaking to various records officers it is also clear that taking on such a role, while remaining essentially compulsory, has been mildly incentivised under the umbrella of 'employer support for staff development': the inclusion of one's performance of a record officer role in annual appraisals can 'add another string to your bow', boosting your chances of promotion.

And more could be done, I feel: perhaps something as simple as a reconsideration of role titles would help us distinguish those staff who *want* to promote records management from those staff who are simply enlisted to help – a substantial distinction between the records 'champion' and the record 'officer'-type roles? Or perhaps a change in how these roles are filled? Rather than an autocratic and fairly blind nomination by managers, a means of specifically

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eliciting support staff buy-in to records management would be advantageous. Another idea is to develop motivational incentives such as workforce groups and social events – a little like what records managers experience with membership of a professional association – or *quid pro quo* arrangements for taking on the additional role, such as time off in lieu. For those who take up such roles in a business context, such things might well improve the experience and effectiveness of records management support staff, contributing to the integrity of the whole records management program.

Records management continues to tackle various challenges *en route* its full establishment in the workplace as a professional discipline, recognised as such by key decision-makers and resource allocators. Once this is achieved, however, my concern is that we subtly undo our good work in some of the ways in which we work with staff on the ground. Whilst the practice of using records 'champions' or 'officers' to trumpet your cause within a business is widely practised and deemed to be effective, the method has not, I think, been sufficiently scrutinised as a whole. Looking critically at what we do and how we do it would have the benefit of increasing our sensitivity to how we are received in the workplace, and make us more open to introducing even small changes that can have a positive impact on those we work with: smoothing the path of true love between good records management and happy, effective businesses. ❖

➲ This article was first published in the UK's IRMS *Bulletin*, July 2015.

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DECISION MAKING SKILLS – A KEY TO DRIVING CHANGE WHEN AGILITY IS EVERYTHING

Web3.0 semantic web will see a continued explosion of digital data being created and bring about a new set of challenges for digital data asset management. Records and information management (RIM) professionals are at a new crossroad which requires new business models, management strategies and tactics to shape a digital foundation and build digital risk teams. One of the tools that underpins the ability to be agile is having good decision making skills. This article covers the six basic steps for decision making.

By **Linda Shave**

STEP 1

Understanding what decision making skills are

Decision making skills are the tools that you can use to solve problems and make informed decisions.

STEP 2

Knowing why decision making skills are useful

Decision making skills provide you with the foundation, ability and confidence to make sound decisions and make the best choice(s) to achieve your objectives at work and in your personal life.

STEP 3

Grasping the foundation of a good decision

A good decision is as follows:

◆ Based on listening, facts and data, not just opinions

◆ Inclusive of people that might be impacted

◆ Supported by experience

◆ Based on understanding what the consequences might be

STEP 4

Knowing how to use decision making tools

Here are some tools that might be used in decision making:

- Informal discussion
- Brainstorming
- Elimination
- Prioritising

Informal discussion

Informal discussions are a good way of examining the problem/opportunity thoroughly, looking at it from all angles and discussing options by doing the following:

- Bouncing ideas off other people
- Thinking out loud
- Listing advantages and disadvantages in an open and healthy environment
- Reaching consensus by considering the ideas and feelings of all the team and resolving differences of opinion

Brainstorming

Brainstorming provides a mutual process for a team to creatively generate ideas on a topic that is free from censure and judgement. What does brainstorming do?

- It encourages open thinking.
- It involves all team members.
- It encourages enthusiasm, eagerness and readiness for innovation.
- It allows team members to be creative, build on each other's perspectives and inputs.

Elimination

It is not uncommon that during informal discussion or brainstorming that some options can be ignored. Eliminating unworkable decisions can result in a manageable list of ideas that have a greater chance of being successful. Some elimination factors might be:

- Cost
- Risk
- Time
- Resources (for example – people, transport, buildings equipment and technology)

Prioritising

Prioritising allows you to narrow down the options through a systematic approach of comparing choices by selecting, weighting and applying a criteria. What does prioritising do?

- It quickly identifies discrepancies/disagreements so they may be resolved up front.
- It enables a team to focus on the best thing(s) to do and increases the changes for a successful implementation.

STEP 5

Putting your decision to work

Having reached agreement on which option to go with you need to put the decision to work. You are now ready to plan and communicate your decision for change by doing the following:

Taking action

- A good decision means nothing until it is put into effect.

Developing a plan and communication strategy

- Good plans help manage resources and time.
- Good communication helps explain the purpose for the change, what improvement can be expected and opens up a channel for feedback.
- Following up on the plan can make sure the problem is being resolved and has not returned and/or taken another form.

Informing others

- Make sure everyone affected by the decision knows what will change and why.

- Be honest and accept the responsibility for solving problems and making decisions.

- Take full advantage of your intuition and analytical skills.

- Have confidence in your ability to make good decisions.

- Do not be afraid to learn from mistakes.

STEP 6

Gathering information

- During the team's setup, members will debate numerous issues, look at large volumes of data, make many decisions and take many actions.

- During this information gathering period, accurate records need to be captured on what, how and why the team came to its conclusions, decisions and what it accomplished.

- Records need to be created, managed and preserved. Records might include the following:
  – Agenda and minutes from meetings
  – Data including graphs and charts
  – Results of surveys
  – Reports (project plans, accounts etc)

Now you have the six basic steps for decision making to add to your toolbox of tricks. ❖

ABOUT THE AUTHOR

Linda Shave is acknowledged as a thought leader and architect of change. She is a researcher, consultant and auditor in areas of virtual information asset management, business process management, cloud migration, corporate governance and risk management. Linda is a former CEO, CIO and a member of numerous professional organisations.

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MANAGEMENT LESSONS FROM THE CLIMATE CHANGE DEBATE

There are similarities between the issues faced by the climate change fraternity and those of us wanting people to understand the risks of *not* managing information and records well… as well as the benefits of managing them well.

By **Michelle Linton** and **Kevin Dwyer**

story snapshot

What are the lessons for RIM professionals from what has been achieved by the climate change fraternity in changing communities of opinion?

The climate change fraternity has had powerful opposition from those who only have to deny the potential consequences of climate change and emphasise the potential economic cost to make traction. RIM professionals are often also at odds with others.

It is up to us as RIM professionals to build not only our technical and systems skills but our managerial skills so that we might have a voice that is heard.

Have you noticed a change in the climate science debate? We have. In the six years since the summit in Copenhagen, and particularly in the last two years, the attitude of governments has changed noticeably, with previous laggards now leading the way. Not only have governments come on board, but so have major shareholding organisations such as pension funds and even organisations within the energy industry. For example, Australian Gas Light Company (AGL), Australia's largest greenhouse gas emitter, has vowed to close all its existing coal-fired power stations by 2050 and will not build or buy new conventional plants in the meantime.

The desire for change has developed a high degree of momentum from the inertia of last decade. It is not the scientists pushing on their own against the consciously and unconsciously incompetent. Rather, participants with much to lose have joined the scientists' team and are debating from within rather than opposing from without.

Noted environmentalist Paul Hawken describes what has happened in his quote: "Good management is the art of making problems so interesting and their solutions so constructive that everyone wants to get to work and deal with them."

So what are the lessons for records and information managers from what has been achieved by the climate change fraternity in changing communities of opinion ranging from politicians to corporate leaders to regulators to the general population?

Firstly, there are similarities between the issues faced by climate change and those of us wanting people to understand the risks of not managing information and records well, and the benefits of managing them well.

Carbon dioxide is not a visible threat, nor are poor records and information management (RIM) practices. The link between cause and effect is not linear in either case, as other contributing factors are always present in any event. There is a delay between cause and effect in both cases too.

The community prosecuting climate change have been mainly scientists, not readily seen as skilful communicators. The community prosecuting good RIM practices, we need to accept, are not meant to be skilful communicators based on their backgrounds.

The climate change fraternity has had very powerful opposition who have only had to deny the potential consequences of climate change and emphasise the potential economic cost to make traction. RIM professionals are often

also at odds with others. For example, information and technology (IT) managers, who see the value in managing structured data with some rigour, do not always see the benefit in managing the unstructured data, which gives context to the nature and values of the structured data and the decisions made based on the structured data. They are also often at odds with managers of professional services such as legal, HR, procurement and engineering, who often perceive that they have special needs when it comes to systems and see their processes beyond that of managing records and information.

However, there are more than similarities in issues. There are similarities in the leadership and managerial skills required to enable a convincing argument to be prosecuted.

STRATEGIC PLANNING

Strategic planning is an essential skill for a records and information manager wanting to make a real difference. When climate change was seen as the province of scientists and not seen as part of strategy for governments and corporates at local national and global level, it did not progress at all.

It is similar with RIM. If we consider strategy, courtesy of Michael Porter (Porter, 1980) in its simplest form, there are two sources of competitive advantage; cost advantage and differentiation advantage. In both cases it is the resources and capabilities of an organisation that provides the competitive advantage.

Good information management makes better use of resources such as:

◆ organisational know-how including knowledge management, recruitment and performance management

◆ patents and trademarks including legal records and case management

◆ assets including buildings, plant and equipment and their maintenance

◆ internal and external relationships.

Good information management improves capabilities in terms of:

◆ processes and procedures

◆ access to information at the point of need

◆ accuracy of information

◆ continuous improvement with visible impacts of cause and effect.

Therefore, good information management practices are linked inextricably to better development and execution of strategy. Information itself, is an asset and needs to be managed hand in glove under the same strategic imperatives as financial, physical and human assets.

We need to be able to converse strategically with business and make it compelling that information is a strategic asset and that its management is an enabler of the balance of the organisation's strategy.

PROJECT MANAGEMENT

Project management, to the uninitiated, evokes thoughts of restrictive practices, a concentration on process and outputs rather than outcomes, and a sense of what can't be done rather than what can.

⟹

The truth of the matter is a far cry from these perceptions.

Project management is the means by which we are able to get that elusive 'management by-in' by creating a detailed plan to achieve our desired outcomes, a governance structure by which to manage progress, and the accompanying risks in our plan and communication artefacts, which we can use to both consult and keep stakeholders informed.

Key documents in a PMBOK (Project Management Institute, 2015) methodology, in summary form, comprise:

◆ charter

◆ scope for each deliverable (output)

◆ work breakdown structure

◆ risk treatment plan

◆ reporting documents.

Paradoxically, scientists who insist on the rigour of research and peer reviews are not so accommodating, when it comes to rigour over what they perceive as the 'administration' of their research. Records and information managers share this trait. Rigour over taxonomy and sentencing and elements associated with compliance with national or state laws is not always replicated when it comes to the management of information management projects.

Learning what these documents are, how to write them well, and how to use them and their content to get agreement

and set up detailed budgets and reporting will stand any records and information manager in good stead. They become a single source of truth about the project and the means by which information about how all of the elements of the project link together can be shared. They also encourage the use of a shared language making communication so much easier.

> *We need to become financially literate to at least be able to work with business analysts to determine the bottom line impact to costs, revenues and income of managing information poorly and, of course, managing it well*

FINANCIAL MANAGEMENT

The business case for climate change has been subject to hyperventilation on both sides of the argument. Opponents have worked themselves into a lather over the deleterious impact of higher costs on the global economy in treating a problem they believed did not exist. The proponents did not, in the early stages, articulate the specific impacts on local economies of doing nothing nor did they articulate the benefits of doing something.

In managing information, the benefits are often couched in compliance terms. Research (Dwyer & Linton, 2011) has shown that this has a large negative impact on the prospects of success in terms of levels of adoption of new behaviours and practices.

We need to become financially literate to at least be able to work with business analysts to determine the bottom line impact to costs, revenues and income of managing information poorly and, of course, managing it well.

INFLUENCING AND COMMUNICATION

Scientists have been poor until recently in communicating the science of climate change in layman terms and combatting the simplistic arguments put forward by their opponents. They have complained about the tactics of their opponents but have not been able to counter them.

We face similar issues. This is a difficult area to master.

Whilst the objective of or communication is to ensure a critical mass of people do what we want them to do for the project to be successful, communication is fraught with the frailties of the human condition.

When we communicate, we encode what we think into words or even perhaps diagrams, charts or graphs. How well we do that depends on our mood, our upbringing, our personality and our passion for the topic. Whoever is listening or reading decodes what we communicate into thoughts. The very act of encoding and decoding has high potential for failure to have the message received being the same as the one we wanted to send.

The act of communicating is built on a fairly faulty capability to listen too. People remember first and last words, repeated words, short phrases (three word slogan anyone?) and odd phrases or words out of context with other words used. They filter words out. They replace words with ones not spoken. When they perceive they hear something they do not like, they can stop listening whilst they run up the ladder of inference, making judgements about the communication and the sender.

While we communicate people feel something first, then think something and then finally do something. The process can take a nanosecond or months.

Learning how to analyse, and then master, the appropriate range of communication devices to get the key cohorts of stakeholders to feel, think and then do what we need for the information management project to be successful is a key skill we should continuously improve.

PERFORMANCE MANAGEMENT

Scientists are quite good at measuring and monitoring performance with longitudinal studies, peer reviews and continuously challenging their assumptions about what is true. They have been so in the climate debate in terms of their own performance and the outcomes for the planet.

We can learn a few things from the science fraternity here. Two aspects of performance management in an information management project are important.

One is to use performance management principles to ensure that we measure the inputs, outputs and outcomes of what we do to ensure we know what is working and what is not. Creating and selecting KPIs, creating surveys that do not skew answers, analysing information dispassionately, and looking for cause and effect are all skills to be learned to ensure we continuously improve our efforts and get better return for them as the project progresses.

The second is using performance management levers to create the perception that good information management practices are the subjective norm and that it is good to follow the norm in our organisation. This is a very important pre-condition for people to form an intent to change their behaviour. ⟹

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Michelle is a Learning & Development professional with 24 years' experience in the planning, design and delivery of training programs. Michelle has developed and delivered innovative, outcome focused EDRMS training for over 30 government and private organisations since 2005. Michelle's pragmatic approach to learning strategies leading to application adoption has been enthusiastically welcomed by the industry, and she is a regular speaker at RIM events and contributor to industry magazines. Linked Training is the training partner in the REX project which was awarded the J.Eddis Linton Award for Excellence – Most outstanding group in 2010.

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Often it isn't possible to use performance management levers with regard to the way people manage their information. It is a reality of life. However, it is often possible to use performance management leavers at the team leader or manager level to ensure that there is awareness the execution of the project plan is being measured.

It is also often possible to discuss with audit the risks of not adhering to information management and policy in terms of reputation, financial assets safety and the environment. It may take some good financial analysis skills and communication skills to do it, but audit can be our best friend when it comes to creating an environment where the change in behaviours is considered to be the subjective norm.

A tool for getting consistent performance is process mapping. Evaluating existing processes and re-engineering them to utilise an EDRMS functionality to improve productivity or reduce risk is a strong lever for getting others to believe the system is worth putting the effort into. We need to become comfortable at offering our services to map and reengineer processes as often the business does not know how to map processes effectively either and they certainly don't know the art of what is possible with the EDRMS functionality as well as we do.

PERSONAL MANAGEMENT

Perhaps the biggest challenge to our scientists in the climate change debate has been to change the way they present themselves and the way they connect. To connect on a social and personal side, not just on an academic side. They have had to learn to be careful about their body language and tone and pace of voice more than the words when they speak. They have had to learn to not just dismiss wild assumptions and distortions of the truth as errant nonsense and to deal with it publically. They have had to learn to find champions outside their fraternity who do not have the detailed understanding they do but who are passionate and can sell a message. They have had to find a way to make climate change, as a topic, interesting.

We have to do the same. We have to connect on personal levels with our key stakeholders. We have to be self-aware of our own shortcomings as a presenter and influencer and, whilst continuing to build our skills, recognise that we could use change champions to help get our message across even if they are not technically correct at all times.

GETTING OUR VOICE HEARD REQUIRES SKILLS

Records and information management is one of the least understood and yet significantly important practices undertaken in organisations across the planet. Whilst if we take no action, there is unlikely to be a catastrophic event for human kind, every day the impact of poor RIM is there to see in very personal ways and ways which impact communities and states.

People die every day because the correct information was not available at the point of need. Billions of dollars are unnecessarily spent on capital works or maintenance or rework. Whole ecosystems are devastated (remember Deepwater Horizon?). The way to improve the management of information lies in the hands of us who are engaged in the current practices. It is up to us to build not only our technical and systems skills but our managerial skills so that we might have a voice that is heard. ❖

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THE FUTURE IS DIGITAL: AN INFORMATION REVOLUTION

Information management has always been evolving and will continue to do so, but our world is changing faster than ever. The trends we can observe today point to a digital dystopia – a nightmare for records and information managers and indeed information workers everywhere.

By **Kye O'Donnell**

We need to shift our focus to ensure we are supporting the modern information worker to be effective, productive and fulfilled. We need to lead an information revolution to imagine and create a new type of digital workspace.

Since the commencement of the information age, information management practices have been evolving as information technology has advanced. While systems for controlling records were relatively simple for centuries, the advent of computers rapidly changed the way we store and retrieve information today.

INFORMATION EVOLUTION

A timeline of this evolution is summarised below:

1800s

Paper registers and index cards are used to help locate and retrieve hardcopy manuscripts and ledgers.

1980s

Databases in the form of records management systems are used to register and manage paper files, replacing index cards.

1990s

Email and desktop computing applications are in common use, resulting in a proliferation of electronic records across organisations and reducing the use of corporate paper files.

2000s

Records management systems evolve into Electronic Document & Records Management Systems (EDRMS) to capture email and electronic documents, and such systems become widely used by organisations.

2010s

Cloud computing emerges and a variety of online repositories (eg, Dropbox, Google Drive, OneDrive, Apple iCloud) become freely available, reducing the use of the corporate EDRMS.

INFORMATION MEGATRENDS

Records and information management (RIM) practices are now changing quicker than ever before due to the massive growth in data, increased workforce mobility, social media, email dependence, the emergence of digital natives and stricter compliance requirements. These long-term changes to the way society works are often referred to as 'megatrends'. Key megatrends that are having a major impact on information management include:

◆ **Data growth**: 90% of the world's data has been created in the past two years[1]. The sheer volume of data now available for analysis is resulting in an explosion of new information being created each day that needs to be captured and managed by organisations.

◆ **Mobility**: 65% of Australians currently have a smart phone[2]. This means that consumers, citizens and staff are increasingly expecting information and services to be delivered directly to their mobile devices.

◆ **Social media**: 73% of Australians are regularly using social media to engage with their family and friends, and increasingly to interact with companies and governments[2]. Social media is disrupting traditional communication channels such as the telephone and email, creating new digital channels that organisations must monitor and manage.

◆ **Email dependence**: 55% of 183 billion emails sent each day are business related[3]. Our continued reliance on emails for business communication poses a great challenge for records managers, with most of these records not being captured into official recordkeeping systems for ongoing retention and access.

◆ **Compliance**: 61% non-compliance with recordkeeping standards among organisations that Votar Partners have assessed in the past two years. Across Australia government recordkeeping standards have become more specific and measurable, however most organisations are yet to achieve compliance with mandatory requirements.

◆ **Digital natives**: 86% of young internet users in the developed world are 'digital natives'[4]. These people are the employees of the future and will come to organisations with high levels of computer literacy and expectations of highly usable and efficient information management systems.

A DIGITAL DYSTOPIA

The availability of corporate and personal information repositories has exploded, creating a new chaos and taking us ever closer towards a digital dystopia. In addition to corporate systems and network drives, staff have ready access to social media sites, cloud file storage, mobile apps and their mobile devices. The options for connecting and communicating with people is also expanding. While the telephone and later email has replaced much 'snail mail' and face-to-face communication, today SMS, instant messaging, video conferencing and social media comments and 'likes' are resulting in a chaotic web of communication. Records of these communications are dispersed, disjointed, often inaccessible to organisations and are rarely retained or disposed of appropriately.

Organisations are plagued by information silos, EDRMS failures, ongoing staff productivity losses, embarrassing privacy breaches, increasing eDiscovery costs and ultimately digital amnesia where an organisation's valuable corporate memory is being lost forever. Today most organisations are faced with a dysfunctional information management environment, as highlighted by the following:

◆ **Information silos**: 57% of people feel like they are working in 'silos' where information is not easily accessed between organisational divisions, according to recent cultural surveys of people working in Australian organisations by Votar Partners.

◆ **EDRMS failure**: Most EDRMS implementations have failed to achieve their intended objectives, with reports of continued use of share drives and low email capture rates in organisations following system roll outs.

◆ **Productivity loss**: At least 15 minutes per information worker is wasted each day searching for information according to recent calculations by Votar Partners in a range of Victorian government agencies. This is often due to poor version control, classification and workflow tracking.

◆ **Privacy breaches**: $2.8 million is the average total cost to an organisation per data breach in Australia[5]. Privacy breaches can be very damaging to an organisation's reputation and can come at a great personal cost to their clients from fraud and identity theft.

◆ **eDiscovery Costs**: $18,000 per gigabyte is the estimated cost to review data during litigation[6]. When paired with increasing data volumes, the cost of eDiscovery for organisations continues to rise every year.

SUPPORTING THE MODERN INFORMATION WORKER

In today's digital world, good information management is now more relevant than ever. Effective systems and processes to create, capture, control, store, access and dispose of digital information are essential business tools for all organisations. Information workers need to be able to create and connect with people and information in a focussed and unified workspace, wherever they are working. They should be supported to get the job done rather than being hindered by information management activities.

When recruiting a new team member, for example, a manager will interact with many systems and use many communication channels to complete this task. The common experience in most organisations would probably include some of the following activities, and certainly many more:

◆ Browse through a shared drive to find the current position description.

◆ Revise the position description in a word processor and save another version.

◆ Fill in a recruitment form and email it with a copy of the position description to HR.

◆ Create an advertisement on a job website and upload the position description.

◆ Receive applications via email and forward them to the selection panel.

◆ Assess and shortlist the applications and telephone the shortlisted applicants to organise interviews.

◆ Book meeting rooms and send interview invites through the email system.

◆ Download a selection report template from the intranet.

◆ Create a new folder in the EDRMS and save the report in it.

◆ Workflow the report to a senior manager for approval.

◆ Send a paper letter to the successful and unsuccessful candidates.

As you can see the manager needs to remember how the process works, where different information is kept and how to use a number of different systems including shared drives, email, websites, intranet, word processor and EDRMS. The chances of these systems working seamlessly together and all the records of the recruitment process being stored together is extremely low.

An information revolution is overdue so that information workers can be truly task focussed, increasing productivity and organisational learning. They need to initiate work, evaluate relevant information, take action, close work off and then review it so they can learn from the experience. Information lifecycle management must be built into these work processes so that RIM is simply a by-product of an information worker doing their job.

Imagine how the process of recruiting a new team member could work differently. The manager could be stepped through the process, provided with the information they need at each point and automatically capturing the records as they go. The experience could be far different:

◆ Select the profile of the staff member being replaced.

◆ Navigate to their linked position description and revise as required, with a new version saved automatically.

◆ Start a recruitment workflow to send the position description and advertising details to HR for approval.

◆ A new container is automatically created for the recruitment activity to keep all records in, using metadata already provided by the manager when they started the workflow.

◆ Once approved, advertising details are automatically sent to selected job websites.

◆ Applications are sent directly to the container from the job websites after the closing date with workflows started to alert the selection panel.

◆ Shortlisting and interview results are recorded by the panel against the workflows on each application.

◆ A draft selection report is generated automatically using the current template and including details from the workflows, saved into the container and provided to the manager to edit.

◆ Finalising the report sends the workflow to the appropriate senior manager for approval.

◆ Once the preferred candidate has accepted the offer, the manager completes the workflow and a communication is sent to all applicants via the job website they applied through.

Effective systems and processes to create, capture, control, store, access and dispose of digital information are essential business tools for all organisations

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ABOUT THE AUTHOR

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◆ The container is automatically closed and the retention clock starts ticking

◆ A new container is automatically created for the new employee and a copy of their application is saved in it for future reference and longer retention

In this scenario the manager is guided through the process, works within one system that is integrated with the job applicant's online environment, and all the records are being stored in a single container for future reference should there be any complaints from unsuccessful applicants.

A SHIFT IN FOCUS

As records and information managers we need to shift our current focus so we can move into this new digital age. Information management is what we do, but it's not what the users of our systems are typically employed to do. We need to shift our focus to process management and ensure that information supports our organisation's business processes, rather than dictating them. We need to be less focussed on documents and records and completely obsessed with our organisation's clients and workers. Only by understanding the tasks they need to do, can we design systems and processes that capture full and accurate records of their work. We certainly need to ensure our systems are compliant but our true value to our organisations is to enhance staff productivity and the customer experience. We need to evolve from back office administrators to leading innovators.

THE FUTURE DIGITAL WORKSPACE

We desperately need a digital future where an information revolution has resulted in RIM being embedded into our organisation's business processes, transforming recordkeeping systems and providing information workers with a new type of digital workspace. This new workspace must be:

◆ **Intuitive and fun**: So that people want to use it and already know how. Considering the user experience and designing clean, simple and easy to use interfaces will encourage adoption, improve data quality and reduce training and support.

◆ **Contextual**: To provide information with meaning and direct people to other related information that may be useful. By understanding the task people are doing and what they are focussed on at a point in time, we can provide them with timely and relevant information to enhance their decision making.

◆ **Personalised**: To quickly show people what they need to see from their personal perspectives. Each role performs

different tasks and individuals like to work in different ways. A one size fits all approach to system design can't cater for these differences.

◆ **Cost-effective**: Reducing IT overheads and increasing staff productivity can never be forgotten. Unless you are a company like Google, information technology is not your organisation's mission just a cost centre diverting funds from areas where management would rather be investing.

◆ **Secure and compliant**: To meet information security, privacy and recordkeeping compliance requirements. Not ticking all the compliance boxes increases the risk of penalties, successful litigation and reputational damage to your organisation.

◆ **Enduring**: Preserving an organisation's valuable information for the long term. While systems and technologies will come and go, our information must endure, some of it forever. Much information is of limited, short-term value but some categories of information are crucial to the success and sustainability of our organisations, to protect the rights of individuals and to inform society in the future.

◆ **Powerful and adaptable**: To help transform organisations for the rapidly evolving digital age. Our systems need to be constantly reconfigured and improved to ensure they continue to support new and modified business processes and meet the needs of ever maturing information workers.

THE FUTURE OF INFORMATION MANAGEMENT

The future of information management will be simple for tomorrow's information worker. Information management is designed into every step of every business process so that the information worker doesn't even know they are managing their information. When they (or their customer) initiate a task, a record container with required metadata is automatically created. When they evaluate new information, the system provides them with relevant precedents and historical information for comparison and reference. When they take action, it is automatically recorded. When they close off work, the container is immediately closed and retention review dates are automatically calculated. When they review the completed task all the information they need to understand the whole story is kept together, helping them to see the big picture and learn from their experience. Information management has become so embedded into the daily work routine of the information worker that it is just the way things are done. It is consistent, reliable, and above all, easy. ❖
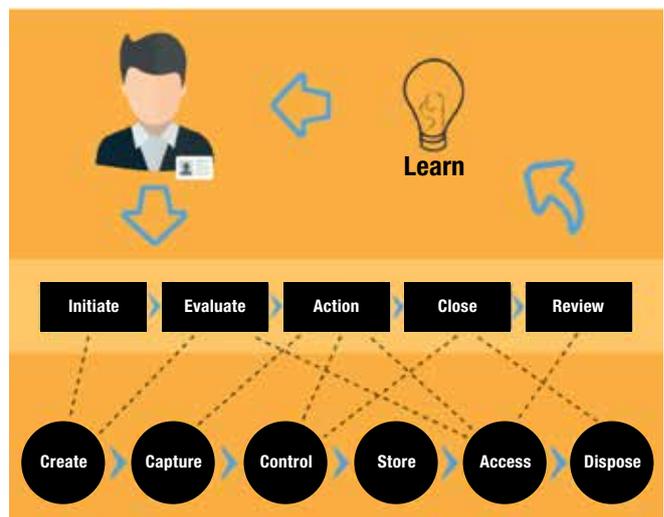
Do they trust us?

This article reports on the results of an online survey which was developed to investigate issues relating to trust present in the New Zealand public sector. The research aimed to elicit records managers' perceptions and also to probe the areas identified from the literature as having a possible impact on trust: management support and training.

By **Jean Hitchcock** and **Gillian Oliver**

An organisation's or community's information culture is one of the facets for analysis identified in the re-conceptualisation of records management as recordkeeping informatics[1]. The trust that users have in recordkeeping systems has been acknowledged as a characteristic of an organisation's information culture, furthermore one that is very open to influence by records managers[2]. The extent to which records managers are aware of this phenomenon though has not been explored in any depth. The research reported in this article attempted to investigate records managers' awareness of trust issues in the New Zealand public sector.

The foundations of human society are built on trust[3], however, it is a difficult concept to define. Records are instruments of trust as well as objects of trust in themselves[4]; and we need to be able to trust records to be authoritative enough to support or deny actions[5]. To ensure effective recordkeeping, Oliver and Foscarini[6] tell us: "We need to not only make sure that our systems are trustworthy, but also make sure that our users too share that trust."

McDonald[7] identifies the main cause of user resistance to engage with recordkeeping systems as a failure to identify and define work processes. One of the key findings from recent research into electronic records management has acknowledged that "records professionals may be part of the problem as well as part of the solution"[8]. Barbara Reed[9] has also noted that recordkeeping professionals can be resistant to change. $\Longrightarrow$

Trust

Assured reliance

confidence or faith is pla
the truth, worth, reliab
dependence on future
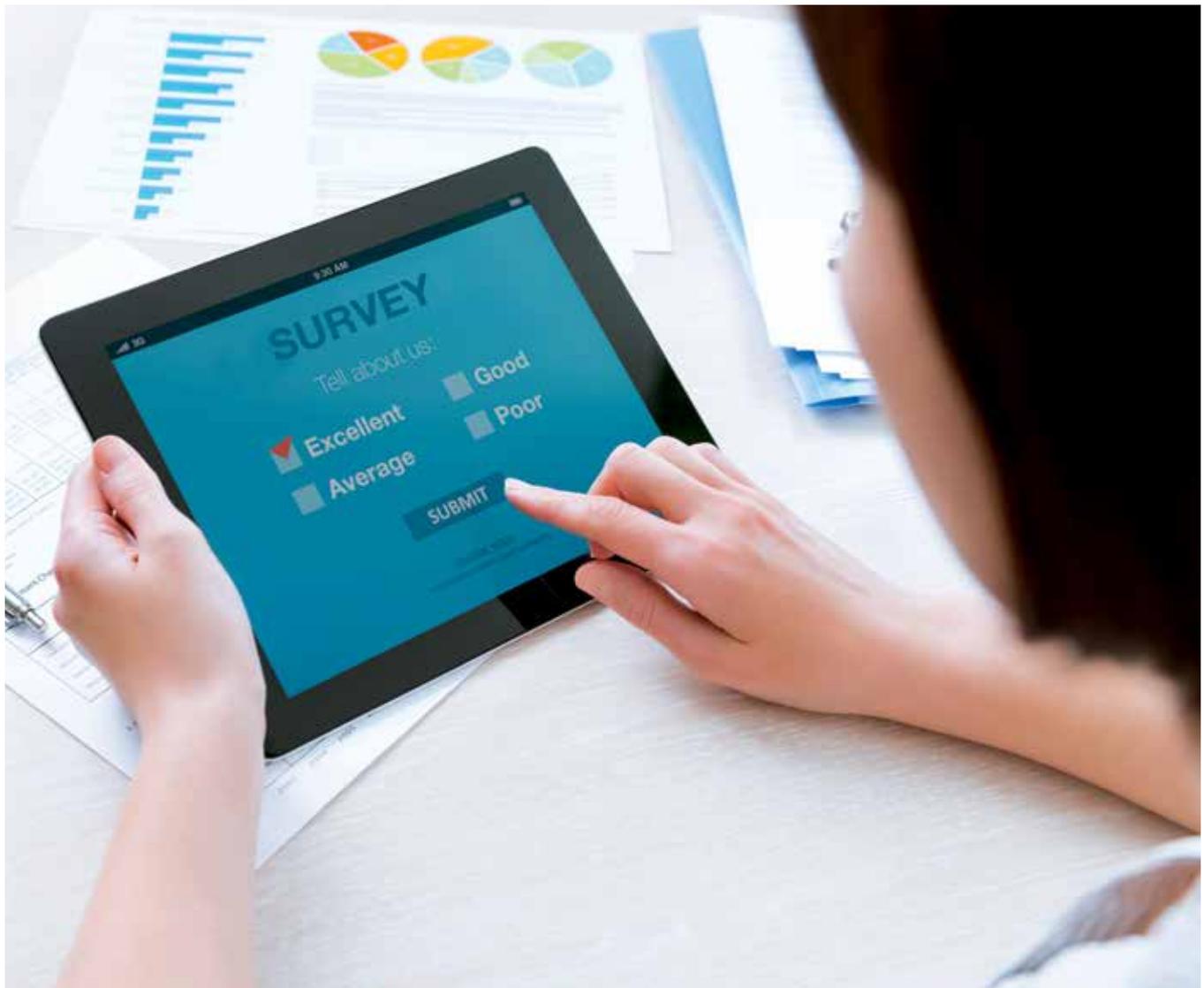
THE SURVEY

An online survey was developed in order to investigate issues relating to trust present in the New Zealand public sector. Questions aimed to elicit records managers' perceptions and also to probe the areas identified from the literature as having a possible impact on trust: management support and training.

FINDINGS

The records managers responding to the survey were generally positive about their recordkeeping systems, with 69% agreeing that their system was successful, 15% disagreeing and the remainder undecided. Although still positive, there was slightly less confidence expressed about employees' attitudes, with 59% agreeing that employees trusted the recordkeeping system. Significantly, the majority of records managers (74%) agreed that lack of trust impacts on employee use of the system.

Only 46% of respondents considered that employees had received sufficient training in their recordkeeping system, perhaps not surprisingly, 39% considered that employees in their organisations felt confident using the recordkeeping system. A similarly gloomy perspective was taken of employees' understanding of the importance of efficient recordkeeping, with 44% agreeing that this was the case.

Thirty respondents (77%) considered their manager understood and trusted the recordkeeping system, with only slightly fewer (29) agreeing that their manager actively promoted its use. However, subsequent responses to the qualitative questions indicated that this positive view of management applied only to the respondents' line managers, and not managers overall in the organisation. Almost all (97%) respondents agreed that management attitudes affect employee compliance in recordkeeping.

Respondents were asked whether they considered changes in recordkeeping systems to be a factor in influencing trust. Most (64%) respondents agreed, while 36% were undecided or disagreed. When asked if employees' confidence in the recordkeeping system helped them to comply with the aims of the *Public Records Act*, only 41% agreed. Respondents were also asked if they thought employees were confident that they would be able to retrieve information added to the recordkeeping system in five years time. Twenty two (56%) agreed, 26% were undecided, with 18% disagreeing.

The final three questions provided the opportunity for respondents to talk about their strategies and to comment on trust issues. They first asked records managers to nominate their most effective strategy to promote trust in their organisation's recordkeeping system. Almost all (36) responded, several with more than one strategy.

Ongoing support, demonstration of effectiveness of the system, and training and communication were mentioned by most. Rapid response to problems was mentioned as fostering trust, as were automating the system to enable compliance with legislation, and ensuring that the systems are embedded into business processes and the way people work. The use of recordkeeping champions, or peer pressure, was also found to be effective by some.

Respondents were asked about ways employees had found to bypass recordkeeping systems. The 36 records managers who answered this question listed a variety of personal 'hoarding of information' methods amongst staff. These included saving records to desktops, saving to shared or personal drives, using the cloud, using USB sticks and external hard drives as well as email. Some, more adventurously, were altering classification structure and changing metadata. Only one respondent stated that any bypassing of the system would be unethical, and was unlikely to be deliberate.

The final question asked for any further comments. Issues with management were noted, and several respondents commented on the contrast between the length of time necessary to build trust, and the rapidity with which it can be lost.

DISCUSSION

Findings from this survey show that New Zealand record managers in the public sector do identify lack of trust in recordkeeping systems as a barrier to effective recordkeeping, to a greater or lesser extent. Most respondents felt that their recordkeeping system was adequate, but fewer felt it was trusted by staff, and even fewer felt staff were confident using it.

Various factors were seen as contributing to user trust: management attitudes and support were identified as crucial, as were training, communication and on-going support. While most respondents found that changes in systems could be a factor in loss of trust, several disagreed. A variety of hoarding of information methods were identified as well as a variety of ways to encourage trust and achieve compliance.

Most respondents were positive about their systems overall, and indicated their systems were successful. Despite this, 74% of respondents felt that lack of trust did have an impact on staff use of the system. To alleviate this situation it is important to find the factors that contribute to the building and destruction of trust in recordkeeping systems. Survey findings support observations from the literature relating to the role of management[10,11,12] with almost all respondents agreeing that attitudes from management affect employee compliance in record keeping. Specific comments included:

◆ "If the head of the organisation and management level are supportive of recordkeeping systems in a regular and direct way, the employees will be. Everything starts from the top."

Frustrations with limited support from management show with comments like:

◆ "All attempts to add specific requirements to performance assessment systems were strongly resisted by managers."

◆ "If the leadership team don't stress the importance of recordkeeping procedures then staff will find themselves too busy to comply."

Other responses sharing successful strategies noted "strong and proactive support from senior and middle management" and "responsible recordkeeping is visibly supported by top tier managers and directors".

When asked about successful strategies most respondents mentioned training and communicating as effective strategies for increasing trust, but also emphasised the need for ongoing training and support:

◆ "Whether you can solve the issues quickly or not, fronting up and communicating is most often appreciated and fosters trust."

Another recommended "delivering 'tiny tips' along the way – never overloading with too much information at once." Others commented on inadequate training:

◆ "We do not do enough training and refresher education …."

◆ "Most organisations I have worked in have limited resources with which to provide training and end user support."

A link between confidence and training has been suggested[13], but the responses to this survey suggested that training had not been entirely successful in helping build confidence. This indicates other factors affecting user confidence, and the importance of ongoing support was mentioned several times.

◆ "If people don't get sufficient and ongoing support they won't use it."

It has been recommended that staff should be made conscious of the importance of records management and their responsibilities to keep records, as part of training[14].

Perhaps the most confronting finding from this survey relates to the fact that although just over half of the respondents felt that employees trust their recordkeeping systems, almost all respondents listed ways staff found to bypass the system, or to hoard information. This implies that while there may be degrees of trust, trust is not absolute.

Strategies used to promote trust including ongoing support, demonstration of effectiveness, and training and communication. One respondent found that going back to basics was important: "explaining the concepts and reasons for good record and document management. Employees need to know the why as well as the what to do."

Several records managers identified the same cause for problems they were experiencing in managing records. One respondent expressed the situation this way: "The people who are entrusted with responsibility are usually placed far down the hierarchical pecking order …. [This] serves to actually undermine the stated goal of creating, managing and maintaining good information for now and for the future."

This suggests that some records managers can see the problems in recordkeeping in their organisation, and

Most respondents felt that their recordkeeping system was adequate, but fewer felt it was trusted by staff, and even fewer felt staff were confident using it

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see the potential solutions but, unless they have management support, are unable to implement them.

CONCLUSION

Most records managers surveyed regarded their recordkeeping system as successful, but fewer felt that users trusted their systems. The fact that almost all respondents described ways in which people bypass recordkeeping systems makes it clear that the situation with regard to trust is not as clear cut as may be assumed. While trust in the recordkeeping system is not the only factor affecting recordkeeping behaviours, it is certainly an important one.

Most participants agreed that management support and involvement is vital to promote user trust

Most participants agreed that management support and involvement is vital to promote user trust. People are less likely to trust a system that they do not see their managers using, that is not set up properly, is not integrated into their workflow, is not easy to use, and that lets them down too often. Without trust we will continue to see employees developing their own workarounds, resulting in incomplete recordkeeping. It is vital for records managers to build trust; this is a slow process, and trust, once lost, is difficult to regain. ❖

⤷ The full version of this paper was published as: 'Usage of recordkeeping systems: A question of trust', *Archifacts*, Archives and Records Assn of NZ, Wellington, NZ. pp45-55, April 2015

ABOUT THE AUTHORS

Jean Hitchcock is a recent graduate of Victoria University of Wellington. This paper was based on research she conducted in partial fulfilment of a Master of Information Studies. The aim of this research was to investigate to what extent records managers perceive that levels of trust in organisational recordkeeping systems impact on employee use of these systems.
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View from the floor

inForum 2015 took place at the MCG in Melbourne, from 30 August to 2 September, with records and information management professionals gathering to explore the theme of 'Digital Dreams (not digital nightmares)'. Here's the wrap-up on the event.

Scoreboard at the MCG lit up for the Welcome Reception.

… *a total of 375 participants gathered over the three days of the event at the 'G'*

The highly successful 2015 RIMPA convention inForum 2015 saw 260 delegates (including speakers) with a total of 375 participants gathering over the three days of the event at the 'G'.

With its theme 'Digital Dreams (not digital nightmares)', inForum 2015 touched on a range of areas of interest including: data, the cloud, digitalisation, digital repositories/disposal/destruction, automation, content management, context management, EDRMS and mobile technologies, as well as personnel areas such as up-skilling staff, networking and behavioural profiling for effective workplace performance.

The program featured keynote speakers from the US, Portugal, Austria, New Zealand and Australia, and other great speakers from New Zealand, Belgium and across Australia.

Overseas speakers included William (Bill) Tolson from the USA, Dr Anna Sobczak from Austria, Raf Hens from Belgium and Joao Penha-Lopes from Portugal (via live web stream). The program also included four workshops, seven speakers from New Zealand and 33 Australian speakers.

Bill Tolson provided 75 copies of his mini book *Cloud Archiving for Dummies* at the conference while another keynote speaker Simon Waller, provided 50 copies of his book *Analogosaurus* from the RIMPA stand on Wednesday at morning tea, staying to sign the books and speak to delegates. Overwhelmed by the interest in his presentation and book, Simon later provided a discount code for delegates which gave them a 50% discount if they wished to purchase his book.

In addition to the multi-stream program, delegates were offered the opportunity to complete a work based Behavioural Profile run by Revelian (formerly OneTest) and a session was run on Monday to explain how to understand their results – 166 delegates took up the opportunity to complete a profile.

THE SOCIAL CALENDAR

The sports-themed Welcome Reception was held at the MCG with magnificent views over the cricket ground and, as a highlight, the Southern scoreboard was lit up with the sponsor's logo and a welcome message. Three Sherrin footballs featuring pictures of the AFL team mascots were given away to the best sports-dressed guests, the food was abundant, and the atmosphere was filled with a friendly buzz as guests spent the evening catching up.

The RIMPA Gala Awards dinner, with the theme of 'Roaring Twenties', was held in the Plaza Ballroom at the Regent Theatre. Many guests dressed up to fit the theme, getting into the swing of things. Following the more formal part of the evening (the awards) and the main course, the seven-piece band 'The Essential' got the crowd up and dancing.

The networking drinks on Tuesday saw around 50 people catch up over nibbles and drinks for an hour in the Park Lounge at the Pullman Hotel, a short walk from the MCG, and then guests slowly disappeared and moved on to attend Branch Dinners which were being held at various locations around the Melbourne CBD.

Left: Speaker Bill Tolson, from the US, and conference organiser, Kristen Keley.
Above: Dinner guests dancing.

Left: Table centrepiece.
Above: RIMPA Chair Debbie Prout.

THE TRADE EXHIBITION

The Trade Exhibition saw the re-introduction of a Trade Treasure Map, where participating delegates visited each stand in order to receive a stamp and the opportunity to talk to the exhibiting companies. The complete maps went in the draw to win a free inForum 2016 registration and the winner – Kelly Hartley, Department of Defence – was drawn at a seated lunch on Wednesday along with the prizes from competitions run by many of the exhibitors.

The trade exhibition was interesting and diverse, with each company making an effort to draw interest from delegates in differing ways, including the ever popular Barista

Best giveaway: iPlatinum

Most informative stand: Information Proficiency/ Sigma Data

Most interesting stand: EzeScan

Coffee cart at the Recall Stand, the Mobile Device Recharge bar sponsored by Grace Information & Records Management, the driving simulator at the Objective stand, and the giveaway plush ferret toys which won newcomer iPlatinum the People's Choice Award for Best Giveaway. The other People's Choice Awards went to Information Proficiency/Sigma Data for Most Informative Stand and EzeScan for Most Interesting Stand. ❖

Above: The Plaza Ballroom at the Regent's Theatre.
Right: Guests all decked out for the 'Roaring Twenties' Gala Dinner.

An A-Z recap of inForum 2015

inForum is over for another year. Whilst many of us are already thinking ahead as to how we can combine holiday and conference in 2016 at inForum Perth (thanks RIMPA!), let's take a quick look at the inForum that was in 2015.

By **Alison Toohey**

A = **Accelerated Information Growth** – William Tolson from Actiance Inc presented 'Dark Clouds on the Horizon' which identified the challenge we face with the rise of information growth and with people reluctant to delete information. Bigger issues arise due to data that is being retained and not being managed well.

B = **BHAG (Big Hairy Audacious Goal)** – Kate Fuelling of Lime Business Solutions threw down the gauntlet with a call to action. Figure out your organisation's BHAG and work on small steps and actions to help you achieve that goal. Dream big, think small!

C = **Conversation List** – Ron Gibson from Go Networking challenged us to ask ourselves "Who is on our Conversation List"? Are we ensuring we can make ongoing contact with the people we 'network' with to ensure that any secondary contact isn't a cold call asking for help? Ask yourself, "What can I do for this person?", and start to give to your contacts before looking to them for help. Think about how you can make a second point of contact, as this is when the networking really begins.

D = **Dark Clouds – Dark Data – Data Analytics – Digital Dystopia**. The 2015 inForum theme, 'Digital Dreams (not digital nightmares)' gave us a taste of what was to come, yet there are so many possibilities to highlight under 'D'. My pick would be Digital Amnesia. Kye O'Donnell from Votar Partners discussed the digital future, and used Digital Amnesia, whilst listing several challenges of Digital Dystopia. What a great way of describing how our corporate memories are being lost due to so many challenges like keeping up with changing technology and an increase in dark data. This concept is highlighting the impact that the increase of volume, variety, and velocity of information is having on our organisations. (See Kye's article on page 29).

Yesterday (and by yesterday I mean a few years ago) our biggest concern in managing information in our small organisations was loss of corporate data through employee attrition. Today, this is still an issue, but add to that the loss that is occurring at the point of creating information and data, due to the sheer volume, and that digital nightmare is becoming a reality.

E = **Evolution – Information Evolution** (Index Cards ➔ Electronic Management ➔ E-mails/Desktop ➔ EDRMS ➔ Cloud)

F = **Friday Fling** – Kate Feulling gave us the Friday Fling as an example of one of the many possible actions on your way to achieving your BHAG. If it is undertaken correctly, getting management buy-in, using a method of change management (this might be creating guidelines, floor walkers, before and after photos) and carefully planning the logistics, then the Friday Fling could turn into a really successful campaign on your journey to your organisation's information BHAG.

G = **Guatemala Police Archives** – Picture this: A cramped room, exposed bricks and beams, and dim single lightbulb hanging from the ceiling, oh… and did I mention two million pages worth of documents? If you missed Simon Waller's presentation, '21st Century Business Tools' then what you are picturing is the Guatemala Police Archives – a dingy room, one of many, holding years of information in hard-copy format, bundled up in piles, with no apparent sense of order.

H = **Hammers** – 'Everything Looks Like an Excel Solution'. Simon Waller discussed the perception of using one type of tool for everything. If you are a heavy Excel user, then Excel is your solution for everything. We need to move from hammers to tools, identifying multiple applications to achieve the outcomes we require. We shouldn't force one tool – a hammer – to fit every need, but be able to identify and adjust, using all of the tools in our toolbox.

Hashtags – #inforum2015, #tmi = too much information, #omg = we all know what that means!, #bff = Let's make our end users our new #bff's.

I = **iSquares** – One of the highlights of inForum this year was Professor Pauline Joseph's presentation of her research using iSquares. Professor Joseph, from Curtin University, is conducting an extensive research project including students of Information Management, practitioners and, in her next project phase, asking end users to answer the question "What

> *Ask yourself, "What can I do for this person?", and start to give to your contacts before looking to them for help*

iSquare stand with participants.

is information?". Subjects are asked to spend seven minutes drawing what information is, and then to provide a brief description of what they have drawn. Results so far are being analysed to identify types of drawings: for example, grouping diagrams or process diagrams. The methods of analysing drawings to provide statistical information is fascinating. If you missed Pauline's presentation, look her up, and talk to her about how your organisation could be involved in her research on how end users view information.

J = **'Joining Forces**: Applying Change versus Information Management for Digital Transition' – an insightful presentation from Philippa Fogarty from X4 Consulting highlighted the similarities between information managers and change managers. Change managers apply knowledge, approaches and tools to help organisations manage the 'people' side of projects and programs. I found encouragement in the similar challenges that we both face, appreciating that together we can achieve better outcomes for our projects.

K = **Knowledge** – inForum is a fantastic chance to meet up with people who have the same professional interests as you and are all willing to share and learn together. Every year I am amazed at the amount of knowledge that our industry has, and the willingness of our industry professionals to share their knowledge with their peers.

L = **Life and Death** – Janita Stuart from Worksafe New Zealand provided us with an informative overview of examples of when improper or inadequate recordkeeping can, and has, meant the difference between life and death in her presentation 'Information Management : A Matter of Life or Death?'.

M = **Megatrends** – Kye O'Donnell referred to megatrends to outline some of the key changes in which society works:

- Data growth
- Mobility
- Social media
- Email dependence
- Compliance
- Digital natives

These areas are changing how we source and provide information, and therefore they affect how our information management principles will need to be developed to handle them.

N = **'Newbies'** – the Newbies Orientation is a fantastic initiative by RIMPA to get first time inForum attendees together in a room and break the ice before the hard yards begin. What a great way to welcome people for the first time to four days of learning, networking, socialising, and sharing in the knowledge that our industry professionals are so willing to share with us all. I can't wait to see all this years' newbies at next year's inForum as 'old hands'.

O = **Optimal Ownership** – Included in my notes on Phillipa Fogarty's presentation, 'Joining Forces: Applying Change in Information Management for Digital Transition', I jotted down these two words. The term struck me as important in the change management process. To ensure that end users are engaged in any changes or updates that we are implementing, information managers need to understand and address change management, or collaborate with change managers to ensure our end product, whether it be a closed shared drive or a new EDRMS, has maximum adoption.

P = **PDs** – Is your PD about compliance or continuous improvement? Here is a call to action to take a look at your own position description. Does your PD focus on compliance driven tasks? It is time to overhaul your PD so that you are undertaking tasks of continuous improvement in your organisation instead of being solely focused on being compliant. Is it time to get out the red pen and attack your PD?

Q = **Quo** – Status Quo – Do it a bit better than the status quo.
Quote – 'Belief is like a muscle' – Lewis Howes

R = **Roaring Twenties!** An A-Z of inForum 2015 wouldn't be complete without a rundown on the Gala Dinner, and what an event! A huge thank you to everyone involved in ensuring we had a fantastic night with our fellow RIM professionals. The EzeScan (baseball) team stole the show once more with their themed costume, along with many others who put thought and time into their outfits. I have never spent so long out on the dance floor – I strictly needed flat shoes (and a Berocca the next day!).

The Gala Dinner – this year with a Roaring Twenties theme – is always a highlight of the inForum social calendar.

S = **Sobczak, Anna** – Given the challenging task of presenting after the RIMPA Lunch on Wednesday, Anna flourished by providing us with an overview of her background from her studies, her PhD in history with an emphasis on digitisation, to her work with the International Atomic Energy Agency (ARMS), and providing us with a glimpse into her varied Information Management career. Anna's timeline of Digitisation at the German Archives, from 1970 until 2010, which saw the launch of Archives Portal Europe, highlighted the journey that has been taken over decades to ensure access to Europe's archives is available to all.

T = Transferable Skills in Information Management – Michelle Teis from Glentworth presented 'IM Practices for Data Analytics', looking to the future of Data Analytics and what information management skills can be complementary to the data scientist/analyst arena. Michelle finished her presentation with a challenge to information managers to "step up to the plate" in the Data Science arena, because if we don't, other professions will.

U = Users – Elizabeth Carss from Miktysh presented a Proof of Concept for their 'House of CARDS' (Capture/Access/Retention/Disposal/Storage) project implementation which allowed a business as usual approach for end users. It highlighted how end users are used to working in their given system, ie SharePoint/TRIM/Shared Drive, and showed how Miktysh were able to configure a system that allows compliance with the CARDS requirements whilst allowing end users to remain comfortable with their processes in record keeping.

V = Volume, Velocity and Variety – According to Kye O'Donnell – who presented early in the program – volume, velocity and variety are key factors in the challenges we face when working with the ongoing proliferation of information. His discussion of 'Megatrends' that are influencing how we receive, work with, and disseminate information highlighted how important these 'three V's' continue to be in the information sphere.

Here, I would spend a little more time and space on V to give me the chance to rave about a personal favourite information management area of mine – visualisation. I was excited to hear Michelle Teis reference the Information is Beautiful website (www.informationisbeautiful.net/visualizations). If you haven't already seen this website, take some time to have a look at some of the amazing visualisation exercises they have undertaken. My personal favourite at the moment, with all of the talk on 'superfoods' is the visualisation entitled 'Snakeoil Superfoods?', but one more in line with our work might be 'The World's Biggest Data Breaches'.

W = Walking the Walk – What a fantastic way to represent the ideals of our profession than to move away from providing a printed schedule and to adopt the use of an app. RIMPA inForum app was agile, easy to use, and provided delegates with everything they needed to navigate this year's inForum. Well done RIMPA on showing how paper-free we can be.

X = The X factor… Melbourne – Call me biased, but what a fantastic city. I may live hours away from the

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capital, but the feeling of zipping over the Westgate for a weekend – or in this case, a few days – in the best capital city, with the best coffee you can get, always gives me a little zing!

Y = You! Everyone that attends inForum contributes to creating a fantastic event for our industry. We all have time and budget constraints, but if there is one professional development opportunity for you to attend, seriously consider making it inForum. You won't regret it!

Z = eZescan, and all of our other vendors – It's a stretch to find a Z, but here is the chance to acknowledge the hard work that all of the vendors put into attending inForum. Each year we come back to work with a swathe of products that we try to convince our managers to purchase. Whether it be scanners, add-on products or consulting, we find just the thing that will make our job a little easier, we start on the business cases, and hopefully we are successful in acquiring something new to assist us in our tasks. A big thank you to every vendor that puts in the time, effort, and money that goes into presenting at inForum.

I have added a second 'X Factor', which isn't so much of a secret, but no recap would be complete without praising RIMPA and the organising committee that works tirelessly before, during and after the event to ensure everything runs smoothly, and delegates and attendees have a rewarding time. Thank you all – from those manning the registration desk, to Paula Smith and Tim Newbegin moderating the rooms (OK, both were fun, but the music in the Jim Stynes room got you over the line Tim!). Everyone who puts in so much time to get this group of people together deserves so much praise. Thanks and kudos to you all. ❖

↻ Disclaimer: This A-Z covers aspects of the presentations that I attended; therefore not all presentations have been included.

View of Melbourne city and the Yarra River.

inForum – an investment in yourself

Flying back to Brisbane after inForum2015 I found myself thinking about how much we invest in ourselves. Learning is an everyday experience. Are we taking advantage of the opportunity to learn?

By **Jennifer Curley**

At the convention there was some talk about professional membership fees and who should be contributing towards the costs. Personally, I pay my RIMPA membership fees, as this is an investment in myself. Since starting my career in 1982, there have been numerous courses and seminars I have attended, and have paid for myself. In Australia the costs can be used as a tax deduction.

I would not expect my employer to pay for my shoes, haircuts or clothes, so why do we expect professional development to be paid for by them? It is *my* career – *my* investment.

Ok, I was successful in getting the job. Now what? Once in the role, it was time to think about the other skills I needed. Time management, report writing and how to manage a team – all subjects that needed further attention. What about my CV? Have I been adding to that in terms of professional development and education? At inForum 2015, we had the opportunity to network, find out the latest news in terms of policies, procedures and technology updates, as well as hear case studies and learnings from our fellow RIM professionals. There were so many opportunities and experiences to take advantage of.

There were so many opportunities and experiences to take advantage of

WHAT'S NEXT?

Time to check out the RIMPA website to see what is happening in terms of upcoming events and courses. And if there is something that should be on the calendar of events and is not there yet, why not make some recommendations to the Branch Council?

It is my career and my investment. I am a passionate records and information management professional. ❖

The inForum 2015 convention was hustle and bustle – conversations about how things are going. What is the industry up to? What have you been focusing on recently? Catching up with people you have not seen face to face in a year. Then suddenly all quiet, sitting on a plane heading home. So, there I was with time to think about all that had taken place over the last few days.

inForum 2015 was certainly an opportunity to invest in yourself. I know that when I have gone for interviews, I have made sure my shoes were shined, my hair and nails looking their best, and my choice of clothing was appropriate. It may not have been the best outfit in my wardrobe, however, it was a very close second. I had invested in the shoes, the hairdresser and the clothes. With so many applicants going for the job, I was there to make an impression. All these things I did to further my career, to better myself and to find a role that gave me job satisfaction.

ABOUT THE AUTHOR

Jennifer Curley ARIM is RIMPA's Qld Company Director. She has over 30 years' experience in records and information management, and has been an active member of the Qld Branch Council since 2003 and on the RIMPA Board since 2011. In June this year, Jennifer retired from the workforce.

My inForum –
the learnings, the revelations, the validations

This was my first inForum in three years due to other work commitments – and, even though it was a real effort to fit it into my work and personal schedule, it was definitely worth it. I had a great time and it really reminded me of how important it is to spend time with people who share your passions – whatever they may be!

By **Bonita Kennedy**

First up for me was the Branch Council meeting: on the one hand it was really disappointing to hear that all branches are struggling as the SA Branch is – both with numbers of members and numbers zof professional members and attendance. On the other hand, it was wonderful to hear the determination and dedication of current branch councillors in finding ways to make sure we succeed at both Branch and national level.

From there, it was off to the Welcome Reception, a very important part of inForum. It was a great opportunity to catch up with old friends and meet some of the speakers for the upcoming days.

MY FAVOURITE SESSIONS

My favourite sessions of the conference were Ron Gibson of Go Networking and Kate Fuelling of Lime Business Solutions.

One of the most important benefits of attending events like inForum are the numerous opportunities to network. Ron made me completely rethink my views though. Not that he contradicted my view that networking is important, but rather he took it to a whole new level. The two key points that I look away from Ron's presentation were:

> networking = making friends
> and
> ask more than you tell

By setting achievable goals we build both self-confidence and confidence in our teams that we can deliver successful outcomes

Ron's whole philosophy of 'what can I do to help?' was refreshing and a really lovely sentiment. I actually think it's a philosophy that is important to records management and RIM professionals. Let's face it, the compliance stick rarely works anymore. The how-can-I-help attitude is much more conducive to an open discussion and a positive result.

So who are you having lunch with today?

Kate's presentation, 'Dream Big, Think Small', also made me

sit back and rethink some of the projects I've been asked to work on. According to Kate's presentation (and Collins and Porras 1994) organisations need BHAG's (aka Big Hairy Audacious Goals!). A BHAG is a "10 to 30 year goal to progress towards an envisioned future". The fact is, the large majority of BHAG's fail. There are many reasons for this, one of which is it's very hard to stay focused and motivated for long periods of time when there are no rewards or inadequate milestones. To 'dream big, think small' has many benefits. Instead of setting up these massive projects with visions of utopia, isn't it better to break it down into achievable goals with clear milestones so that we can celebrate our achievements? By setting achievable goals we build both self-confidence and confidence in our teams that we can deliver successful outcomes. That makes the next goal much more attainable and easier to encourage participants to engage with what is seen as a successful team/project.

MY PONDERINGS

A lot of the time, if you are a regular conference attendee, there can be some repetition to either speakers or topics. What I found really interesting, for me this time that wasn't a negative. Often when I hear a topic that I think I know, there are still some revelations, something I've forgotten or even just a reminder of something that I should or could be doing. Different things also resonate dependent on what job or project you are working on at the time. There are many theories on how many times you need to see or hear something for it to sink in, but one thing is consistent – it is always more than once!

During the course of the conference I spoke to a number of vendors and asked about their experiences of inForum 2015. I have to say I was really pleased with their responses for a number of reasons.

1   I want everyone to be happy!

2   It is really important that vendors are happy, as without them the conference would not only be

ABOUT THE AUTHOR

Bonita Kennedy has been consulting in the records management industry for over 12 years and is the current president of RIMPA's SA Branch Council. She is also the owner of the SA business Honey Lady, specialising in raw SA spice blended honey.

more expensive but there would also be less opportunities for learning and networking across industries and professions.

And there's always the added bonus of give-aways and prize draws as well.

If you are like me and a bit hesitant to approach the stalls – either because you're not in the market, or they're your competitors etc etc – then you shouldn't be. I often have to force myself to make the effort to engage in conversation with people/companies I don't know, but I still do it! And sometimes these are the most rewarding conversations of an event/conference. What we all want (I think), in work and life in general, is engagement with those around us. Every time you engage with a conference delegate or vendor there is an opportunity for learning, a laugh and a new relationship that could be beneficial now or in the future. And trust me, they want you to talk to them. No-one at an event wants to stand around like Nigel no friends (apologies to any Nigels out there).

So whether it is the next inForum or another event, take the opportunity, set yourself the challenge to engage with two or more people that you don't already know. OR if you know everyone, pursue a more detailed conversation to learn something new about the person, their company or their job. It could turn out they like red wine as much as you! ❖

Set yourself the challenge to engage with two or more people that you don't already know

A newbie's impression of inForum 2015

This newbie and records management student volunteered at inForum because she wanted to learn about the *people* in the industry. Here's her report.

By **Jade Koekoe**

Since 2013 I have been studying librarianship and corporate information management. I also signed up for RIMPA that year, but I really had no idea what being part of a professional association was all about. As a result I was not active within the community at all, in fact I only really used my RIMPA membership to check the job boards and read *iQ* (while wishing I could write as well as those authors!).
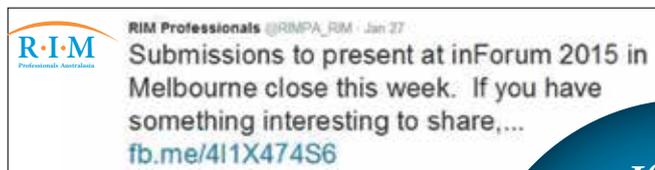
> **RIM Professionals** @RIMPA_RIM · Jan 27
> Submissions to present at inForum 2015 in Melbourne close this week. If you have something interesting to share,...
> fb.me/4I1X474S6

I saw on Twitter earlier this year that RIMPA was looking for presentation submissions for inForum 2015. A little Google search told me that inForum was a conference for records managers and that it was being held in Melbourne. It struck me that this was my chance to 'see' more of the records and information (RIM) community. After emailing RIMPA to see if they were interested in allowing me to volunteer at inForum, I was offered roles at the registration desk and as chair-person for a workshop.

On Sunday as I worked with the team behind the registration desk, I got the feeling that the RIM community is very close-knit. People were expressing their desire to catch up with friends from other states and I was constantly regaled with many tales of various welcome reception and gala award dinners. These people were nothing like my coursework in RIM had led me to believe – stuffy and obsessed with policies and procedures. I was starting to believe that I could have a little fun while I learned at this conference.

I attended a newbies orientation which I found incredibly helpful. I was introduced to the staff and board who ran RIMPA along with its branch managers around Australia and New Zealand. I was told what RIMPA could do for me and what I could do for RIMPA. It's because of the newbies orientation that I'm writing this article. We were assured that we could write anything related to the industry and that it would be considered for publication in *iQ*. If you're a RIM student reading this, I encourage you to try writing something for *iQ* as well. You may think you don't know enough to write about any RIM topic, but you'd be surprised, I bet once you start writing you won't be able to stop!

Some of the other things suggested that we can do for RIMPA:

◆ Suggest event ideas, RIMPA loves to hear feedback from its members.

inForum registration desk and exhibitor/sponsor wall.

> *If you're a RIM student reading this, I encourage you to try writing something for iQ as well*

◆ If you have a venue where events could be held at your work, let RIMPA know.

◆ If you have been in the industry a while, offer to be a mentor for RIMPA's program.

◆ Speak at conferences and events.

◆ Host events.

As a newbie and student studying RIM, I offered to volunteer at inForum because I wanted to learn about the *people* in the industry. Sure trends and current discussions are great to know as well, but I was more interested in getting to know who my peers would be. It was my pleasure to learn that everyone in the RIM community are such collaborative people, working on projects and problems together and always learning from one another. I believe it will be a joy and continual learning experience to work in this industry, and now, I am motivated more than ever to complete my studies ASAP! ❖

ABOUT THE AUTHOR

Jade Koekoe currently works in the Sir Louis Matheson Library at Monash University and is a student studying Librarianship and Corporate Information Management. After she completes her degree she hopes to work with and manage digital collections. She lives by the adage of DFTBA (Don't Forget to be Awesome).
➲ You can find her online at misskokothelibrarian.com and on Twitter @misskokolib.

OUTSTANDING ACHIEVEMENTS AWARDED

The RIMPA Awards were presented at inForum 2015.

INDUSTRY CONTRIBUTION

Introduced in 2014, the awards for industry contribution are presented to professional members of the association who have contributed to the RIM industry in a notable way.

The awards cover the following areas:

◆ Involvement with Standards / Education

◆ Involvement with Company

◆ Involvement with Leadership / Mentoring

◆ Involvement with Innovation / Strategy / Governance

In 2015 the winners are:

◆ **Allison Hunter** – Contribution to Vic Branch

◆ **Meryl Bourke** – Contribution to Queensland Local Government and Corporations Chapter

◆ **Bonita Kennedy** – Contribution to SA Branch

◆ **Anika Moore** – Contribution to Young Graduates Program

◆ **Susan Skudder** – Contribution to Standards and NZ Branch

◆ **Rhonda Marchant** – Contribution to Local Government (NSW)

RECALL ARTICLE OF THE YEAR AWARD

This award recognises quality written contributions to *iQ* magazine in the previous 12 months.

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In 2015, the shortlisted articles were:

◆ Kylie Welch – 'Setting up a successful RM department'

◆ Peter O'Halloran – 'From digital dinosaur to digital diva'

◆ Chris Colwell – 'Practitioner, pracademic or just plain mad?'

Winner: Kylie Welch – 'Setting up a successful RM department'

The judges said it was well written, informative, easy to read, user friendly and appropriate for the audience. The article contained good practical advice which would be very useful for someone new to the environment. Kylie's article has also already been reprinted in the UK IRMS *Bulletin*.

How you can be in the running for the 2015-16 Article of the Year Award

Every article/paper published in *iQ* between now and August 2016 automatically goes into contention for the 2015-16 Article of the Year Award. There is no need to fill in an entry form. As always, the judges will be looking for articles that inform, engage and inspire readers, while displaying the authors' sound knowledge of their subject. So, set to work on your potentially award-winning article today.

⊃ Send *iQ* submissions to editor.iq@rimpa.com.au.

JIM SHEPHERD AWARD

This award recognises vendor contributions to the records and information management industry and the ongoing support of RIMPA. There are two categories.

No nominations were received in the Regional category. Nominations for the National/Multinational category were:

◆ Kapish

◆ Records Solutions

Winner: Kapish

Colin Anderson and Julie Miller with Debbie Prout – Kapish won the Jim Shepherd Award for the National/Multinational category.

J EDDIS LINTON AWARDS

These awards are for excellence in records and information management.

Category – Innovation: sponsored by Information Proficiency / Sigma Data

Recognises leadership through the practical application of innovative solutions for new and existing market needs resulting in a commercial, environmental and/or social benefit.

Shortlisted nominations:

◆ City of Perth with Curtin University

◆ Federal Court of Australia

◆ Queensland State Archives

◆ University of Southern Queensland

Winner: Federal Court of Australia
The Federal Court is the first Australian court to implement Electronic Court Files (a fully digital file of all documents filed with or created by the Court) and is a leader globally in the practice of management and archiving of electronic court documents.

The Federal Court interprets and exercises the general law of the Commonwealth of Australia with an original jurisdiction conferred by 150 statutes of the Parliament. It sits in all capital cities and elsewhere in Australia as required. The Court's registry also provides services to the Federal Circuit Court (formerly the Federal Magistrate's Court). Together they receive more than 12,000 filings and action in excess of 125,000 documents each year.

Category – Business Benefit: sponsored by Information Proficiency / Sigma Data

Recognises individuals and organisations that have achieved outstanding success for business improvement.

Shortlisted nominations:

◆ Federal Court of Australia

◆ University of Southern Queensland

◆ University of the Sunshine Coast

Winner: Federal Court of Australia
As per previous award.

Lyn Nasir and The Hon Christopher Jessup, Victorian Federal Court judge, Federal Court of Australia – winner of two J Eddis Linton Awards, both sponsored by Information Proficiency/Sigma Data: the Innovation category, and the Business Benefit category.

Winners of the Collaboration category of the J Eddis Linton Awards, Dr Pauline Joseph, Curtin University (left) and Julie Mathieson, City of Perth (right) with Mike Kirkby, from EzeScan, which sponsored the category.

Category – Collaboration: sponsored by EzeScan

Recognises an exemplary skills development collaboration between a department, employer or industry body and, at least, one other stakeholder (including vendors and consultant).

Shortlisted nominations:

◆ City of Perth with Curtin University

◆ Federal Court of Australia

◆ University of Southern Queensland

Winner: City of Perth / Curtin University

Since 2013 these two organisations have jointly offered the Records Officer Paid-Cadetship program. This Cadetship at the City of Perth is offered to part-time or full-time postgraduate students, who are due to complete their Diploma or Masters in Records and Archives Management at Curtin University.

The program is aimed at assisting students to transit successfully into our records and archives management profession with paid work experience, whilst studying in their chosen careers.

Category – Implementation: sponsored by FYB

Recognises individuals and organisations that have achieved outstanding results through excellence in implementation of a project.

Shortlisted nominations:

◆ Federal Court of Australia

◆ Moreton Bay Regional Council

◆ National Blood Authority

◆ University of Southern Queensland

Winner: National Blood Authority

The National Blood Authority (NBA) has completed a project that transformed the agency's operations from a highly-traditional paper-heavy approach to a digital-first culture. An active program of digitisation of legacy paper records was accompanied by decommissioning of over 80% of shared drives/email storage and strong senior executive support resulted in an immediate migration to digital information management.

Category – Student of the Year: sponsored by Records Solutions

Shortlisted nominations:

◆ Elizabeth Charlton

◆ Carolyn Murphy

◆ Tegan Valentine

Winner: Elizabeth Charlton ❖

Left: Chris Alday, FYB (left) and Kelly Brown, National Blood Authority, which won the J Eddis Linton Award for Innovation, sponsored by FYB.
Above: Kylie Welch (left), accepted the award for Student of the Year – on behalf of winner Elizabeth Charlton – from Anne Cornish, Records Solutions, sponsor of the award.

House of CARDS | definition

Miktysh's solution for
Capturing,
Accessing,
Retaining,
Disposing and
Storing (CARDS) information

The House of CARDS

where information capture, records management and network drives meet

The impact of mobile, social, and cloud information has blurred digital and physical worlds and created a window into the unknown. The exertion of these technologies has a significant impact on business process management (BPM), resulting in the requirement for new approaches to information management and recordkeeping processes.

increase. Manual compilation of records and the 'search and destroy' mentality for non-important files can be a minefield. Additionally the increasing volume of digital information generated on a daily basis and the reliance on staff to ensure information is captured for the organisation results in information overload, dark data and duplication.

Records management has typically been associated with out of control information storage, ballooning technological expense and impossible compliance targets. The Miktysh team wanted to find a way to build a seamless, uninterrupted and compliant solution, enabling your organisation to drive digitisation and pull information from any platform using an invisible framework that empowers your business.

So Miktysh have navigated the information landscape and developed a way to deal with your information nightmares, using the structural pillars of recordkeeping they refer to as their *House of CARDS* (Capture, Access, Retention, Disposal, and Storage) solution.

FULL HOUSE – WHAT TO DO?

Typically, when organisations discover a full house and no room to accumulate their electronic information, they simply add storage (physically or virtually). It's a cheap option, but not necessarily safe or secure. A large percentage of stored information has a short legislated lifespan and is not required to be kept. So why keep it? Many deem it too difficult and time consuming to rummage through a mountain of information that may no longer be required. It's even harder to justify constantly buying more storage when many organisations waste millions of dollars locating lost information; lost in the abyss because it has not been stored in a structured system, removed mistakenly or by design, or just buried in network drives.

Staff new to organisations emerge from a digital environment where all information is electronic – Facebook, Twitter, Instagram, email, Google docs and the internet. They have a similar expectation for information access in their workplace. Information is everywhere, in every form and we must manage it more successfully than has been done in the past. Frequently records managers now require tools in place to capture the required information without imposing additional tasks on staff. There are instances of failed implementations where the organisation's *House of CARDS* has toppled and rebuilding is impractical and costly. Businesses need seamless integrations to avoid disruptions to the business and the customer experience.

We must migrate our thinking to encapsulate everything rather than just capturing records. The Miktysh *House of CARDS* solution leverages existing software and applications (SharePoint, EDRMS, Network drives) providing a structured approach across the same information, using the same business classification. An initial mapping of information stored within these repositories will be required against the organisation's business classification scheme and retention and disposal schedules. An initial de-duplication may also be performed during the analysis.

Miktysh have bespoke methodology to help build your *House of CARDS*. Our solution will ensure staff are capturing information created or received by the organisation in any format and across its lifespan according to legislated requirements; to keep information secure now and into the future, and accessible to all staff. You must consider whether doing some hard work now, with your existing systems is easier than trying to put a business case together to buy another tool.

> *Businesses need seamless integrations to avoid disruptions to the business and the customer experience*

Effective records capture is an age old dilemma, however the emergence of Freedom of Information and Right to Information (Qld) legislation has added further pressure. Records managers can feel like their 'house of cards' has collapsed. Instead of effectively managing electronic and paper records, records staff find themselves policing others who are negligent in appropriately capturing information for the organisation. Information silos extend the discovery process for records managers for the latest version. Silos also will prevent users working effectively across the organisational platform. The collaboration stops at the silo door. Whilst there are organisations which have successfully implemented systems to capture information appropriately and reduce paper use and network drives, the user experience has not always been remarkable.

Records managers deal with a vexing mass of information daily and most would confess to less success in capturing organisationally compliant records as digital sources

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WHAT'S IN THE HOUSE OF CARDS?

The House of CARDS solution comprises the following:

◆ **Capture**: Information is captured and saved by the users via the network drive, SharePoint or EDRMS based on their personal preferences.

◆ **Access**: Users access their information through their preferred interface – SharePoint, EDRMS, Network drive. Access to information is leveraged using the EDRMS security functionality and imposed via the users preferred interface.

◆ **Retention**: All documents are managed by the EDRMS in the background. Retention and disposal is administered using the EDRMS features. This is facilitated by the Records Management area and prevents early or unauthorised destruction.

◆ **Disposal**: Leveraging EDRMS functionality, disposal is carried out in line with approved retention and disposal schedules.

◆ **Storage**: Storage requirements and duplication are reduced as user's have access to the same information exposed across all systems.

Key benefits

◆ Reduce cost and effort for capturing, accessing, retaining, disposing and storing

◆ Capture 100% of corporate information

◆ Achieve Greater visibility of information

◆ No deployment required (zero footprint)

◆ Access, View and Edit corporate information from multiple sources

◆ Open and Save records from native applications

◆ Consistent approach to the way information is structured

◆ Reduce cost for training, information retrieval processes and compliance

◆ Users can access the application (EDRMS, Network Drive, SharePoint) they wish to use for capturing their corporate information – making their process business as usual

◆ Work in the Network Drive and have recordkeeping happen in the background

◆ Make SharePoint and Network Drives compliant utilising your EDRMS without additional Add-Ins or Applications

Regardless of whether your organisation already has an electronic recordkeeping system (an EDRMS) and/or unmanaged network drives, you can integrate them to make recordkeeping seamless. There are options to allow you to set up policies that automatically manage information in the EDRMS, all the while, the staff are happily doing business as usual. Your *House of CARDS* is built using all data, all sources of information across the organisation with minimum pain points, leveraging existing business systems. ❖

⊃ If you would like to know more about Miktysh's House of CARDS solution, go to www.miktysh.com.au.

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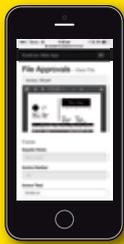
Records enable your staff!

☑ anyone

☑ anywhere

☑ anytime