

IRM Hot Topic

- **IRM Professional Development:**

Is there a gap between what we want/need & what we have?

- While some people's needs are met, mostly there is a gap.
- Lack of available causes
- Causes available but, tool specific – but more wanted, not sure how to choose or have done them.
- Common
- Lots of paper work to be completed even for small amount of money
- Whose responsibility is it to identify training + training opportunities e.g.: Agree it's shared.
- Training in risk management, project management, change management, data management and softer skills such as influencing.
- Not all causes are created equal – need more information about bad causes to avoid
- More common to have a gap in professional development.
- Informal
- Minimal training and development
- Cost is an issue. Plus, bureaucracy.
- Must put case for conference
- Lack of prof. development assessment
- Lots of self-taught
- On the job
- Tool specific training is here, but want more
- Networking in worktime is good
- Defining core skill set
- Not all courses are suitable for everyone. Need more information about bad courses to avoid

Role for ALGIM:

- Talk to CEO and HR about the value of IRM skills
- Talk to HR directors – Career planning + professional development for IRM staff.
- Lots of people are self – taught. e.g. to establish local/regional networking around training & development opportunities.

- **Dissolution of shared network drives:**

- **Future technologies:**

Issues:

- Interoperability
- Only as good as your metadata
- Big systems tension with smaller specialist tools

- How to get the record stuff into new tech? – not just disposal
- Email: primary comm tool but worst kept
- Getting replaced by team sites
- Needing to understand how the systems work together
- Two-way talking system gets doc, then it gets returned once updated.

New Stuff:

- Machine learning (unlocking info in our records)
- Apps – location tags so can then see all photos from that location (Hurunui)
- Enterprise IM
- Info-council (Agendas minutes)
- Collaboration
- Go Get
- Pro-mapp (work flow/ process)

Gaps:

- Saving texts/ IM into EDRMS
- Classifying emails – tools?
- Coping with images (EDRMS not doing it well)
- Social media
- Info governance

Approach:

- Disparate systems and a “kick – ass search”
- Use the specialist tools rather than trying to make EDRMS do everything
- Manage in place
- Innovation sessions
- Being curious
- IT/ IM relationship
- Link to strategy

Requirements:

- UX
- Integration to be seamless
- Greater requirement for public availability
- Info governance
- Building in RM requirements
- Becoming auditors
- Info Gov
- Internal Standards e.g. metadata
- Who is leading?
- How curious are we?
- Who has the budget?

- Getting IM in the decision
- Integration between data & RM
- Making it easier for them to us

- **Hybrid record:**
 - Definition: traditional BUT – paper and electronic (text)
 - Multiple formats
 - Multiple versions e.g. signed H/C mins & version for the web
 - Multiple locations – different management regimes
 - Same format, multiple +/- or different instances
 - Transformation through time – e.g. provenances local govt reorganisation
 - Challenges:
 - Multiple processes for same 'record' & hybrid processes – including audit trails
 - R+D applied to totality of record
 - Issue – deletion / destruction from back-up tapes
 - Complexity – e.g. unique identifiers & connections in systems
 - Retention of corporate memory about why and how decisions were made – make a record e.g. inhouse v outsourced
 - Always be hybrid, need money to manage
 - Value vs Use, records vs archives (paper but up electronic)
 - Discoverability – got them all? Same M/Data?

- **Retention and Disposal:**
 - Is about managing your information and getting rid of the rubbish.
 - Not many LA have implemented a RDS manage in place.
 - A lot of LA working in both paper and electronic i.e. Hybrid systems
 - LA are scanning, digitising but not destroying e.g. inwards mail. Some destroying after 6 months
 - *Ashburton DC*
 - Leonie: R & D implements in EDRMS
 - Important part of the management of records
 - Grandparents dates – LPR – says 1946 but if your LA has had a disaster that has destroyed records then that is the grandparent date.
 - RDS model is a class-based system. It is not based on any BCS.
 - Metadata kept when destroying both paper and electronic.
 - With paper records metadata is summarised e.g. invoices from July 2016 – August 2016.
 - If others with same EDRMS are implanting RDS talk to them – no need to reinvent the world.
 - Destroy electronic – remember back up tapes.

- **Email Archiving:**

- Can a system identify an existing email and automatically identify and update versions saved in a DMS?
- Reducing/managing risk
- Is the system: managing / storing, who's dealing with it & what's in it?

What's being done with the information?

- Into is used for what purpose?
- Storage locations & capacity
- Stats of email traffic & what's in our repositories
- To get attention on the issue

Solutions:

- Automation
- Human
- Policies / Rules
- Forcing rules from EDRMS
- Do we care about all emails – are they all equal? (RISK?)
- Naming conventions?

Gaps:

- Managing other form of communication – enforcing or enabling
- IT-driven not infrastructure management
- Search across in boxes – public information
- Between systems – integration
- Ease of recording emails to EDRMS
- Only sender/recipient can manage
- Clear policy & direction/guidelines
- Ensuring top-down support
- Tagging emails that AREN'T required – junk before archiving

Managing people leaving?

- Notifying when people are leaving – intranet notification, email group.
- Understanding what is left behind.