10 Coping with COVID: Finding the silver lining

13 Managing information in a pandemic: Microsoft 365
16 Challenges and opportunities around data sharing during the COVID-19 pandemic
32 Ctrl + Alt + Repeat: Why the COVID-driven acceleration could be short lived
39 COVID impacts on fire and flood recoveries
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Who's who
From the Chair
IRMS news
Industry news
Diary dates
New members

Coping with COVID
Coping with COVID: Finding the silver lining
Kay Young
Managing information in a pandemic: Microsoft 365
Claire Boyle
Challenges and opportunities around data sharing during the COVID-19 pandemic – the experience in Leicester
Lynn Wyeth
The impact of the COVID-19 health crisis on recordkeeping in the Scottish public sector
Gillian Mapstone
Research explores pandemic’s impact on FOI in Scotland
Joe Chapman
Ctrl + Alt + Repeat: Why the COVID-driven acceleration could be short lived
Stuart Bernard

COVID impacts on fire and flood recoveries
Emma Dadson
How COVID will change warehousing and distribution Forever
Debra Wilkins
Three ways to ensure privacy during a pandemic: What links COVID-19 to new regulations?
Gwendoline Huret

Information Management
Celebrating 100 years of UCL Department of Information Studies
Elizabeth Shepherd
Book review: UK GDPR Handbook
Jamie Burton

IRMS Groups
IRMS Public Sector Group: Facing the Brave New World
Elizabeth Barber
Dear readers,

I hope that readers remain fit and well. As I write, the sun is shining and I hope that we have a balmy summer, especially as I have taken up the new outdoor hobby of lawn bowls.

Since the last issue we have held the Annual General Meeting of the Society. As with last year, this was held “virtually” and I am pleased that it ran smoothly without technical hiccups. The new Articles of Association were approved and I am hoping that the Society will now gain charitable status in the near future.

During the AGM I ran through some highs and lows, which I will repeat below for those who could not attend.

Lows

• We were unable, of course, to hold face-to-face meetings, events, or accreditations because of COVID-19.

• We were unable to hold Conference in 2020, although I am delighted that this will be an “in person” event in Birmingham from 28-30 November 2021, including the awards ceremony.

• We have a number of group chair vacancies to be filled.

• The capacity of the IRMS team to deliver all planned workstreams was impacted, although we have increased our resources on the Executive team and hope to be running at full steam again shortly.

Highs

• Membership and revenues held up despite the challenges of COVID-19.

• The Society has had a range of great virtual offerings during pandemic, including webinars, #IRMSHour on Twitter, and pub quizzes.

• We held a successful online awards ceremony in 2020, as well as AGMs in 2020 and 2021.

• We are hopefully on the last lap toward the Society gaining charitable status.

• We established the Microsoft Customer Advisory Board and are continuing to hold associated roundtable events. The intention of this Board has been to help influence the direction of the records management capabilities provided within the Microsoft 365 platform. It has been facilitating a conversation between Microsoft, the memberships of the IRMS and other professional organisations, leading subject matter experts, and multiple national archival bodies around the world. We are delighted to announce that some of the issues that we brought to Microsoft’s attention last summer are now being significantly improved. We are currently engaged in a conversation on email management and plan a next discussion on long-term preservation.

• We have been involved in the Digital DPIA project (Dapian system), which is available at a discounted rate to corporate members.

• We have been working with the Archives and Records Association and other membership organisations on wider advocacy matters for the profession.

cont on Page 6...
IRMS Charity Articles of Association

At the IRMS Annual General Meeting in May we asked members to vote on the following:

- approval of the minutes of the last annual general meeting;
- approval of the annual report;
- approval of the annual financial statements;
- appointment of the accounts auditor for the following financial year;
- appointments to constitutional posts for the following financial year; and
- any resolutions put to the membership.

In addition to these regular agenda items, this year the Executive Team submitted new Articles of Association. These Articles were drafted to replace the IRMS Constitution as part of our quest for Charitable status and we are thrilled to report that they were approved by the membership.

IRMS Tech - Microsoft Customer Advisory Board

As announced last year, the IRMS has been leading a Customer Advisory Board (CAB), which has been facilitating a conversation between Microsoft, the memberships of the IRMS and other professional organisations, leading subject matter experts, and multiple national archival bodies around the world.

cont from Page 5...

We’ve had some changes on the Executive team and I welcome everyone in new or changed positions. **Sarah Norman** is our newly elected Marketing Director, **Penny Wright** will now be filling the role of Training Director. **Heather Jack** is our new Membership Director, and **Andrew Harvey** will fill the new role of Data Governance Officer. We are joined by **Leanne Robertson** as Digital & Training Officer, **Neil Reeves** as Groups & Volunteers Officer, and **Claire Boyle** as Data Management Officer. We will also be welcoming a new Content Officer soon. My big thanks again to **Katherine Stevenson** and **Laura Stockwell** who have now left the Executive team.

I hope that readers enjoy another excellent edition of the Bulletin and my thanks to the entire production team.

My “door is always open” to anyone who has thoughts and ideas on what the Society could be doing with regard to member offerings, to support the profession, and wider advocacy of our industry.

I end with my very best wishes to all at this time, hope that you keep safe and well, and look forward to catching up in person with many of you at Conference this year.
The intention of this Board has been to help influence the direction of the records management capabilities provided within the Microsoft 365 platform.

We are delighted to announce that some of the issues that we brought to Microsoft’s attention last summer are now being significantly improved. Microsoft recently announced two new features in preview that represent a step toward more complete records management capabilities: “Multi-stage Disposition Review” (in public preview) and “Adaptive Retention Policies” (being tested in private preview).

These features address the CAB requests of dividing or breaking the disposition review into only what's applicable to the reviewer and the capability to delegate review.

**Multi-stage disposition**

This update allows organisations to introduce a multi-stage disposition process, which will allow each record to be subject to up to five separate stages of review. Importantly, this change will also introduce the ability to separate disposition review, allowing organisations to have different groups of reviewers who can see and review only those records under their remit.

**Adaptive retention policies**

This update allows administrators to create retention policies scoped to geography, department, or another user or site attribute. For example, administrators can create a policy specifically for users in the UK’s Human Resources team by leveraging the adaptive policy scope.

**Driving the future**

The IRMS is thrilled to see this early success from the CAB engagement. Certainly, the ability to effectively delegate disposition review should be a huge step in the right direction for larger organisations.

When we surveyed our members earlier this year, the most significant limitation of Microsoft 365’s records management capabilities was not being able to split or delegate disposition review - this issue was seen as being a Critical or Substantial blocker by 45% of respondents. As such, we’re ecstatic that having prioritised this issue with Microsoft last year, the IRMS CAB is already seeing the fruits of our labour result in tangible benefits for the wider records management community.

**IRMSC Conference 2021 - will you be joining us?**

The next IRMS conference will be in Birmingham this November, followed by our 2022 conference in Glasgow next May. We hope you will be able to join us at least one or ideally both! This is such an important and celebrated event in the information industry, as it provides an unrivalled opportunity for learning and networking in a safe and friendly environment.

For more information and to register, visit the conference website: <www.irmsconference.org.uk>.

**Roundtable**

The IRMS hosts a Roundtable, the aim of which is to hold a conversation with the information management community in order to understand strategies and techniques for implementing email governance. The most recent roundtables have been looking at email management and the discussions will feed further into the existing Customer Advisory Board established with Microsoft. Videos of these roundtables are available on the IRMS
Update of the ISO ad hoc working group on disposition

The IRMS’s Professional Standards Director, Roger Poole, has been sitting on the ISO Ad Hoc working group (AHG2) relating to disposition. AHG2 has met seven times since the November 2020 ISO TC 46/SC 11 plenary, and the group has worked on a gap analysis, audience mapping, and identified potential stakeholders.

As part of the gap analysis work, AHG2 has discussed existing advice and guidelines related to disposition. There is extensive material available from national and local government agencies and National Archives worldwide that provide guidance for implementing disposal and for organising transfer of records of continuing value to archival custody. This heterogeneous material presents differences in terminology and recommended procedures, however, and preliminary results identified that no single standard could be used as reference by different stakeholders due to these differences.

The working group also analysed existing ISO standards in terms of relevance to the disposition process. Disposition requirements are included in several ISO Standards, including ISO 15489 and ISO 16175. Based on the findings from the preliminary gap analysis, current ISO standards do not fully address disposition guidance.

As a consequence of their findings, AHG2 has recommended a new work item for the development of a product to address these challenges.

Training Course Discounts

The IRMS has the following training partners who offer our members special discounts on their Information and Records Management courses and events:

- Healthcare Conferences UK
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Take advantage of this amazing membership benefit and boost your continuing professional development! For more details about our partners and for information on current course offerings, visit our website at <https://irms.org.uk/page/Training>.

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Coping with COVID: Finding the silver lining

By Kay Young

2020 has been a year like no other for many, if not all, professionals working in information and records. When national lockdown was announced in March 2020, many had to work from home, where they hadn’t done so before, had to adapt to new enquiries from colleagues and different priorities in their organisation. Thankfully for me, and for my wider team, the FSA was well set up for office staff to switch to home working. We had established policies and processes to support home working; staff had their own laptops and mobile phones, so there was no scrabble to install software on personal devices, we just suddenly found ourselves unable to go into the office. In our directorate, our focus was on ensuring appropriate security measures were in place and providing technical support for colleagues who were not used to a home working setup.

That is not to say that things were easy; many people didn’t have an appropriate work environment and were logging in from their kitchen tables, bedrooms, or sofas. On top of this, people found themselves with different challenges in their personal lives, for example, a supermarket trip taking several hours because of queues; managing childcare whilst trying to work; the impact of the pandemic on their mental health and wellbeing. Staff didn’t always have a very good Internet connection, particularly those who lived in more rural areas. They had to remember to log into the VPN every time they wanted to access our electronic document and records management system (EDRMS). But we adapted, and I’m so proud of my colleagues for continuing to deliver as close to a normal service as we could. And, of course, all of this was going on while the Agency was still working on EU exit!

But what of information and records management? What challenges did we face in the way we accessed and shared our information?

It just so happened that I was finishing up a project in March 2020 to review our information and document management needs, to consider whether our EDRMS was still fit for purpose. Even before COVID, my findings showed that, as an organisation, we needed to work differently, and, having reviewed user needs, we decided that the solution would be SharePoint.

The FSA had acquired Microsoft Teams a few years before and was in the process of making the switch from Skype to, “Teams first”, for calls and instant messaging. Helpful for meetings, less helpful for document management, as those who didn’t like our EDRMS found it gave them an alternative place to store their information; even better they could share it so entire teams could start working somewhere else. The official line was that Teams was a collaborative space, but final records needed to be moved to the EDRMS; a baseline retention policy of 2 years across SharePoint was in place, so it was not the place for long-term storage. The same policy is in place in OneDrive, so staff would be unwise to hoard content there.
either. It was challenging for us, as people had got a bit ahead of themselves, and we found ourselves with a digital sprawl; we had hundreds of Teams sites, but had lost our holistic view of the file plan. Thankfully, we had limited creation of new Teams to our Digital team, so that lessened the impact for us.

Staff working remotely and collaborating successfully in Teams was really the final nail in the coffin for our EDRMS. The original plan was to kick off the project in spring 2020 and migrate content across to SharePoint; needless to say, this work was deprioritised because we no longer had the available resource in IT to support the activity. This left us in a situation where we had a legacy system in use by some staff, and a less structured collaborative space in use by others. The document management project was not a corporate priority during the pandemic; but providing adequate support to it was. We made sure that the baseline retention period was adjusted, so that information didn’t ‘disappear’ when it was still needed. My team decided that we could pilot working solely in SharePoint, so that we could identify potential blockers, while we couldn’t roll it out more widely. I am particularly pleased with the, “training in stealth”, I inadvertently ran with a virtual quiz, by making my colleagues enter their answers on a shared answer sheet stored in Teams, so they could test out collaborative working features in SharePoint! Naturally, we tested that access controls worked, by locking each answer sheet down to the appropriate team.

Several members of the team attended specialist records management in Microsoft 365 training, so that we could increase our knowledge base in readiness for the project relaunching. We gave thought to the foundation work, like updating the retention schedule, and put together a business case to get consultancy to support us with
more technical aspects of the project. Finally, and most importantly, we kept staff across the Agency up to date via our network of superusers, and spent time identifying user needs, so that we were in a stronger position when we were able to move forward with the project (which is now at a proof-of-concept stage).

I certainly wouldn’t have planned a major project like this had I known a pandemic was imminent, but, despite the challenges, there were a lot of positives which arose from the situation as well:

We got plenty of volunteers to talk to us about their user needs; as we were able to keep sending out communications, people knew it was coming, and found it much easier to attend workshops on Teams rather than having to travel to one of our offices.

It enabled us to test Teams, and to test it, “in anger”, as many people were using it because there wasn’t a sensible alternative for them.

Having meetings and informal catch ups over Teams meant that staff who were geographically dispersed started to feel more like a team; we got to know each other better, and, by making allowances for each other in a tricky situation, I think we felt less like we were in silos and barriers came down.

Our project is now moving out of the design stage, and we will be delivering the new architecture and training virtually, as we are still (mostly) home based. I have every confidence that it will be a success, as our team has demonstrated we’re able to work flexibly and cohesively over the last few challenging months. It is not necessarily how I would have chosen to work, but the benefits we have realised have been enlightening, and finding the positives amongst the challenges as a team has been very rewarding.

The Author

Kay Young is the Information and Records Manager at the Food Standards Agency. She has worked in the information profession for over 10 years and has worked in both the public and private sectors. Her areas of interest are varied, but her overarching goal is to help her colleagues to exploit their information in a compliant way, and to facilitate the, “day job”, with seamless information management.
Managing information in a pandemic: Microsoft 365

By Claire Boyle

With the challenges of the last year and a half, many organisations have been forced to adapt to new ways of working and implement new technologies, perhaps earlier than they would otherwise have done so. While the increased use of remote-working technology offers many wonderful opportunities for organisations, for information managers it can cause a bit of a headache.

Although my organisation’s journey of information management within Microsoft 365 began before lockdown did, the sudden move to home working certainly increased the popularity of Teams, and so it felt pertinent to look at how we manage information in the Microsoft 365 suite, as part of the Coping with COVID edition.

It’s important to set out at the start that this is not a guide on how to perfectly manage information in Microsoft 365, nor is it a claim that the organisation has completed its implementation. Rather it’s an account of what controls the Information Governance team have been putting in place, why those were chosen and whether we believe it has worked.

Information Governance has deployed, and still is deploying, SharePoint across the organisation as a corporate information storage tool, replacing our use of shared drives. IT led the rollout of OneDrive, again replacing the use of network drives for personal storage. And Teams, although subsequently picked up by IT as a replacement for Skype, was largely found by the business areas themselves.

Starting with the biggest repository of information in the Microsoft 365 suite, SharePoint, Information Governance launched a project in 2019 to transfer all our corporate information from shared drives into
the system. Rather than replicating the existing folder structure, which was large, unwieldy and out of date, in terms of organisational hierarchy, a structure was built based on a business classification scheme, which focused largely on organisational function, rather than on teams and departments. By building the Document Centre, as it would come to be known, this way, we are in a much stronger position to be able to map our retention requirements and weather any future organisational change.

Our controls around the Document Centre are much greater than in any other Microsoft tool. The information within it is structured, and subject to comprehensive retention rules, run through Records365, a RecordPoint product. Changes to the structure, access to the information through security groups and the availability of metadata is all approved through Information Governance before being implemented. This gives the organisation peace of mind that its corporate information is managed in a secure and compliant manner and ensures that the Information Governance team’s visibility of the information it manages is retained.

The biggest lesson that has been taken from adopting this kind of approach is to do with culture change. An organisation can have a team of 30 information professionals and the best technology in the world, built on perfect information management principles, but if their people are not on board and doing what is required of them, then the system will fail. The trick is in the balance – staff shouldn’t feel like they need to be records managers in order to do their job, but, at the same time, they need to be confident in using the system to enable the actual records managers to get what they need to do their job.

Moving from a largely team-based system, with lots of quirks born from legacy, to a functional-based system is a massive change for staff. One of the ways this was addressed was by getting users involved from the start. By using the business classification scheme as a starting point, changes could be suggested by users and the final stricture could still be mapped back to the original business classification scheme, and therefore, the retention schedule. Given the size of the change, it is not surprising that there are inconsistencies in how it is being adopted and used, but, by being flexible, continuing to engage users and making changes and updates to the structure where necessary, there is confidence that good information management will continue to become embedded, at least in SharePoint.

Next, in terms of information storage, is probably Teams, at least from a corporate information point of view. Teams is a system that was discovered by business areas and requested from IT. In response to demand, particularly after COVID-19 hit, the Information Governance team realised that some control was needed before the organisation accumulated hundreds of information repositories outside of the main corporate storage. Given the size of the SharePoint migration project, the team aimed for minimal but effective governance. The
idea was to limit staff’s ability to create sites independently, and give the team visibility of each site, and therefore, each information repository, whilst not impacting on the ability of staff to use the software in whichever way met their immediate needs.

So far, this approach has proved quite effective. Each Team is approved by Information Governance and added to a register, as well as having a 2-year blanket retention applied to discourage long-term storage of information, but, beyond that, and some general good information management guidance, the use and management of Teams is largely left to business areas to control.

One of the benefits of this light-touch approach is the flexibility it allows. The way Teams is used and promoted is changing constantly, so, as an organisation, we need to be flexible and able to adapt to new approaches and changed in the technology. It also means that the resource required to manage the governance of Teams and the information within it is nominal.

Some of the challenges that have been encountered with this approach is the demand from staff to use it as a longer-term storage option, particularly as it offers them more freedom than the SharePoint structure. In addition, Teams is highly promoted by Microsoft as the primary tool for, particularly remote, working, but by creating a Team site for a department to operate out of, you immediately introduce information silos and make the sharing of and collaboration on information more difficult cross-organisationally. Despite these challenges, the organisation is successfully using Teams in a relatively controlled manner, and Information Governance have retained visibility of the information, reducing the risk of any nasty surprises in the future.

The last tool concerning the storage of information currently deployed within the organisation is OneDrive. The implementation of OneDrive as a personal storage location was led by IT, rather than Information Governance, although there was involvement from the team. OneDrive has been rolled out solely as personal storage within the organisation, and Information Governance advocate that any corporate work, including drafts, should be held in the Document Centre. The level of governance that has been implemented on OneDrive, however, is negligible. A storage cap has been added to try and encourage staff not to use it for their day-to-day work, and guidance has been issued on how it should be used. Otherwise, there are no information governance controls placed on OneDrive.

One of the main lessons that has been learnt through the implementation of all three tools is that, ultimately, you can’t stop people using the tools they’re given how they feel is best, but what you can do is ensure that the guidance and controls are there that encourage the right tools to be used in the right way. I like it think of it as bumpers on the bowling alley: you might not be able to control the direction of the ball, but you can control where it ends up.

The Author

Claire Boyle started her information management career in 2013 and has worked for organisations such as The University of Edinburgh and the National Records of Scotland. She currently works as a Records Manager at Historic Environment Scotland and is heavily involved in migrating the organisation to SharePoint. She holds an MLitt in Archives and Records Management, and is an accredited member of IRMS, regularly delivering webinars and getting involved with the IRMS Scotland Group.

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Challenges and opportunities around data sharing during the COVID-19 pandemic – the experience in Leicester

By Lynn Wyeth

When lockdown first hit us in 2020, one of the first issues for local authorities was to ensure we could help anyone who didn’t have others to support them. As neighbourhood and mutual aid groups mobilised to deliver shopping and prescriptions to those who could not get out, local authorities were quickly adapting to deal with the new support that was needed, whilst still ensuring key services continued, in addition to the logistical challenge of staff working from home.
One of the first positive moves by the government was the announcement of the COPI regulations, which gave NHS organisations and local authorities the power to waive the usual duty of confidentiality around health data. The Secretary of State for Health and Social Care issued NHS Digital with a Notice under Regulation 3(4) of the Health Service (Control of Patient Information) Regulations 2002 (COPI). This temporary legislation, which has, to date, been extended twice, is quite flexible about how data can be used to respond positively to the pandemic. Data shared under these regulations must be deleted once the regulations cease to be valid.

The COPI regulations allowed the Ministry of Housing Communities and Local Government (MHCLG) to send local authorities a list of shielded patients. Originally, this consisted of 15,000+ patients in Leicester. When a second wave of patients were added later in the pandemic, this increased to 27,000+.

MHCLG also shared a list of those individuals registering on the government portal who said they needed help. This data was shared daily with the council to a single point of contact, and only shared with those that needed to know in the local authority. In Leicester, all those on the shielded list were checked against existing social care files and called by telephone to see if they needed food parcels or other support. A large food hub was established at our concert venue, De Montfort Hall, and all the hall staff deployed onto working at the food hub, making up hundreds of food parcels every day to supplement the government’s initial contract.

The data sharing with MHCLG went smoothly. A national data sharing agreement was drawn up quickly by MHCLG and local authorities were deemed to have ‘signed up’ if they accessed the data from the secure site, which was quickly put in place. There was engagement between MHCLG and the Government Digital Service (GDS) with local authority representatives to design needs and systems, regular online meetings, and regular reviews and improvements made to the site.

The voluntary sector stepped up in the city to help the council deliver services to those self-isolating and shielding. Guidance and advice for such groups, eg, National Mutual Aid Groups, was appearing and locally the council created a county-wide COVID-19 information-sharing agreement (ISA) via the Leicester, Leicestershire & Rutland Strategic Information Management Group for all organisations to use. For expediency, the same principle was used as per the MHCLG agreement, if data was shared, the organisation was deemed to have signed up to the ISA.

Leicester then went into its own lockdown, as other parts of the country had restrictions eased. The data that the council was
receiving from Public Health England (PHE) was not sufficient for us to be able to identify where the virus was spreading. Data was not telling us about individual addresses or ethnicity, where the patient worked, travel details of how they went to work, or how it may have spread – a lot of this data was not even collected originally. We could simply plot hotspots on a map by street. There were difficulties in contacting the relevant people at PHE, and an initial refusal by them to share data, despite the COPI regulations being in place. Disagreements ensued between politicians, resulting in a lot of media coverage, and racism raised its ugly head due to some of the hotspot areas being in parts of the city with a large BAME population.

An ISA was finally agreed by PHE and our local public health team can now access the national CTAS database and share more detailed data. This is not set up for local authorities, so there is still some duplication of data entry. Leicester became the first city to take over test and trace from the national system, staffed by customer services and library staff, 7 days a week. It has resulted in a large increase in contact-tracing rates. The council is able to use other known data to contact people, eg, alternative numbers, addresses via council tax, housing registers, and staff can even physically pop round to trace people or tell them to isolate!

Information sharing became important in other areas during the pandemic.

An ISA has been put in place with supermarkets to pass on shielded data to them to enable priority supermarket slots for those shielding.

£500 payments are made to those required to self-isolate. There is data matching and sharing of data with the DWP, employer, etc to verify the application and stop fraudulent and ineligible claims.

There have been some positives to emerge from the pandemic for those of us working in the information rights field. The pandemic has shown that information governance and data protection are not a blocker, and that information-sharing projects can move at speed when necessary. There is more confidence in data sharing and there has been more integration between health and social care, and we have seen the building of relationships and trust with partner organisations, which is key to successful data sharing.

The Author

Lynn Wyeth is Head of Information Governance, and the Data Protection Officer, at Leicester City Council, where she has 16 years’ practical experience of information rights. She holds a post-graduate diploma in information rights and regularly speaks at and chairs national conferences, as well as offering training in all aspects of information rights. She also holds the BCS ISEB in Data Protection, the BCS ISEB in Freedom of Information, the Certificate in Information Security Management Principles (CISMP) and the HealthCare Information Security and Privacy Practitioners (HCISPP) accreditation.

@LynnFOI
As the world was turned upside down in spring 2020, the impact of the COVID-19 pandemic saw transformational changes in workplaces across the world, with the move to remote home working for all but essential key workers. Little did we anticipate that, over a year later, this disruption would still be in place for many, and that the ‘temporary crisis’ response changes to working cultures would become the new way of working.

During the spring and autumn of 2020, the National Records of Scotland (NRS) conducted two pulse surveys, to measure and understand the disruption and the impact of the pandemic on the recordkeeping community in Scotland. Alongside a discussion webinar event in the summer, the surveys provided valuable insight and metrics about the initial impact of the pandemic, and the longer-term implications for the sector.\(^{[2]}\)

Recordkeeping in Scotland

The Public Records (Scotland) Act 2011\(^{[5]}\) (PRSA) requires all scheduled public authorities in Scotland to prepare a records management plan (RMP), setting out proper arrangements for the management of the authority’s public records; submit this plan to the Keeper of the Records of Scotland for agreement; and ensure the implementation of the agreed plan.\(^{[4]}\) Since its enactment in 2013, the PRSA implementation team at the NRS has assessed and approved over 260 RMPs, which evidence the policies and procedures for the creation, security, management and preservation of public records. The PRSA stakeholder community includes recordkeeping professionals representing the breadth of the Scottish public sector, including health authorities; policing and justice organisations; the culture, leisure and tourism sectors; and both central and local government.\(^{[5]}\)
Since the creation of a statutory requirement to address records management (RM) in the public sector in Scotland, great progress and improvement has been made. All scheduled authorities now have a named individual at the highest level of their organisation with strategic responsibility for their RM.[6] All authorities also have named individuals in the organisation who have operational responsibility for compliance with the agreed plan.[7] This senior commitment and high-level accountability has increased the visibility and importance of record management across the public sector since 2013.[8]

The development and implementation of the keeper’s model plan, setting out 15 elements which authorities have to address in their RMP, further underpins improved recordkeeping through the requirement to address such functions as retention schedules; information security, records transfer and disposition; and, importantly, the extension of such provisions to any third-party organisation conducting functions on behalf of the authority.[9] Moreover, engagement between the NRS and the PRSA stakeholder community, since 2011, has seen the development of a dynamic network of records and information professionals across the public sector, who connect at the triennial PRSA conference, or the regular PRSA surgeries and events held every year, to discuss and explore challenges and developments.

Prior to 2011, recordkeeping in the Scottish public sector was neglected and in poor health. However, the commitment by authorities, supported by the NRS, over the last decade, had seen marked improvement and progress in Scottish public sector recordkeeping practice and development.

And then the pandemic struck.

Understanding the impact

One of the key aims of the surveys was to establish, what, if any, impact of the disruption caused by the changes brought on by the pandemic had been, for our recordkeeping colleagues across Scotland. The responses gave us some clear messages about the health and wellbeing of the sector and the challenges it was facing.

Significant reduction in RM resource and substantial changes to roles and responsibilities

In Scotland, as across the UK, much of the public sector rapidly pivoted to reprioritise and focus resources on tackling the front line COVID-19 response.

The spring survey reported that 20% of respondents had adjustments made to their roles and responsibilities, to support the delivery of key services within their organisations. Alongside the impact of caring responsibilities, staff isolation and initial communication limitations, this led to a significant reduction in capacity across the community.\(^{[10]}\)

By the autumn survey, this figure had significantly increased: the continued adjustments and reprioritisation of the Scottish public sector was now being acutely felt by one-third of respondents.\(^{[11]}\) Redeployment, furlough and recruitment freezes all made their presence felt, along with continued and prolonged role adjustments, significant alterations and additions to existing roles and job descriptions, as a direct result of the pandemic.

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Although nearly half of such changes involved additional information governance (IG) activities, such as IG policy development to support remote working and increased data protection impact assessments, over half of these changes were to include ‘non-IG’ activities, including staff welfare support, health and safety, logistics and distribution, and the development of COVID-secure workplaces.

It is clear from both surveys that the pandemic has put a squeeze on the limited RM resource across the Scottish public sector and has led to a medium-term diversification of job responsibilities, in turn, leading to a dilution of focus on RM activities.

Increased importance of RM visibility in organisations

The move to remote working, and the need to access reliable information, saw an increased importance and visibility of recordkeeping in the spring of 2020. The RM business continuity planning, a feature of the PRSA model plan, stood up to the demands of this unforeseen disruption: 95% of respondents reported the success of their plans to support dispersed working.[13]

The right records in the right place at the right time

Agile and robust recordkeeping has been demonstrably critical to the success of remote-working arrangements and supports the swift public sector response to the pandemic. Both surveys enquired as to the perceived importance of RM in supporting the public sector response to the crisis. In the spring, RM was seen as being moderately important, but by the autumn responses indicated an upward trend in the perception of the role of RM in supporting the authority’s COVID-19 response.[14] Although there is a recognition that the priority is dealing with the urgent health emergency, there is a reported sense of increased visibility of the essential asset of information. Access to reliable, accessible, digital information has been fundamental to supporting business agility during this period of crisis.

A continued widespread cessation of records and information management development work

The impact of reprioritisation, to support the front-line COVID-19 response, meant that 81% of respondents noted moderate to significant derailment of planned RM development initiatives, or the cessation of continuous improvement programmes.[12]

Narrative responses identified an anxiety from colleagues that some of the very positive steps made across the sector, since the introduction of PRSA in 2013, may be undone by the disruption of this pandemic.

12. Impact of COVID-19 on Recordkeeping in Scotland Survey Autumn, October 2020: narrative responses Q7: What has been the impact of the last 6 months, working arrangements on your planned programme of work? 19% noted no significant change; 81% reported moderate or significant changes, which included putting plans on hold to abandoning work plans entirely. 13. Impact of COVID-19 on Recordkeeping in Scotland Survey Autumn, October 2020: narrative responses Q14: How have your business continuity arrangements withstood the impact of COVID-19? 14. Responses to Q9: How important has the records management service you provide been to supporting disrupted working arrangements and business continuity? Impact of COVID-19 on Recordkeeping in Scotland Survey Spring, April 2020 (58/100 score) and Impact of COVID-19 on Recordkeeping in Scotland Survey Autumn, October 2020 (67/100 score).
Challenges and opportunities

Beyond understanding the immediate transformational impact on the sector, the survey and webinar also captured a number of opportunities and challenges for the community, arising from changes brought about by the pandemic.\[15\]

A swift move to digital recordkeeping

The near overnight transformation of the public sector recordkeeping landscape brought about accelerated change in the roll out of digital recordkeeping practice across the board.

Prior to March 2020, 48% of services who participated in the survey operated paper or hybrid recordkeeping arrangements, with aspirations to embrace digital recordkeeping. The transition to digital working was aspirational and not an organisational priority.\[16\] The need to quickly support digital service delivery and working from home accelerated the importance and prioritisation of such changes.

Screen grab form Impact of Covid on Recordkeeping in Scotland Survey, Autumn 2020

By the autumn survey, 50% of respondents had changed their RM arrangements as a result of the pandemic: notably, by this time, we see the complete move away from hybrid systems and paper records, to embrace fully digital solutions and web-based service delivery models.\[17\] 41% of respondents told us that the method of public records creation had also changed by the impact of changed working practices, most significantly, with the roll out of Office 365, SharePoint, Teams and One Drive.\[18\] The move to born-digital record creation and management had been essential to supporting working from home, and this is a welcome development for the sector.

This beneficial progression, however, also came with some genuine concerns, which will prove challenging over the immediate medium and longer term. Whilst the transition to digital working is welcomed, there were a significant number of concerns raised by the surveys and the webinar, as to the lack of control colleagues had over such a significant infrastructure change. They had little influence over the planning and management of the changes. Their expertise and knowledge were sacrificed in favour of rollout speed, to deal with the sudden impact and changes necessitated by the pandemic: “uncontrolled + unmanaged + unstructured data = unsafe data” one comment told us.\[19\]

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Concern amongst recordkeepers includes that the unplanned data sprawl and creation of public records, with inadequate governance and security, has seen a proliferation of records created outside the authority recordkeeping systems. Just over one-third of respondents, in the autumn survey, confirmed they were not always certain that they could locate information in the new digital systems rolled out at pace. Significant work will be required over coming months and years to re-establish holistic business classification schemes and embed rigour and security across all these new information spaces.

New public functions and new public records, which require proper management

38% of survey respondents shared that their organisation was undertaking new activities as a result of COVID-19, and, as a by-product, creating new record types not currently covered by business classification schemes, or retention and disposal schedules. Interestingly, 25% reported the use of new technologies and media for the creation and management of records. As we endured lockdown, many Scottish public authorities moved their face-to-face service delivery online, with the creation of new and broader websites now delivering more and more public functions.

Securing records of enduring value

As we lived through emerging history, there was concern to ensure the capture of public records and historical documentation of Scotland’s COVID-19 response. In the spring survey, 100% of respondents had not formally considered or adapted their retention and disposal schedules to ensure the capture and preservation of COVID-19 records of significant importance for archival purposes.

As the year progressed, however, following a webinar on this event, the autumn survey recorded nearly two-thirds of respondents were currently reviewing, or preparing to review, their existing retention policies to capture this important emerging history. Additionally, 57% had been actively collecting material relating to their COVID-19 response. Notably, the NHS bodies in Scotland were acting collectively to harness their response to a global health crisis, and ensure records relating to COVID-19 are identified and preserved.

At the NRS, we recognised in early spring 2020 the need to adapt our own collecting policies in relation to COVID-19. As the archive for so many public authorities, colleagues were looking to the NRS for guidance and support to ensure the historical challenge could be addressed.

The NRS collects the archival records of Scotland’s national public authorities, criminal and civil courts, as well as many private bodies. These records are in a variety of media and formats, and each year about 1 km of records are usually added to our collections.
In 2020, our teams within Archive Depositor Liaison (our archive service ‘front-end’ for depositors) were busy finding out about the effect of COVID-19 on the functions and services of our depositors: how this would affect the types of records created, and ultimately the shape of our future national archive. The Government Records Collecting Policy was explicitly updated to include COVID-19 records to ensure that Scotland’s response to the pandemic is preserved for future generations.

Additionally, understanding the changing nature of public service citizen interaction, brought on by the pandemic, we swiftly moved to increase our work in the NRS Web Archive.

A year of websites: The Scottish Government website captured each month of the pandemic crisis, captured and preserved in NRS Web Archive.
The NRS Web Continuity Service (WCS) enables the NRS to capture, preserve and make available archival snapshots of our depositors’ (clients’) websites in the NRS Web Archive. The keeper recognises that public authority websites are public records, and therefore, must be a key part of his statutory collecting duty. Collecting these important records not only supports public access to historical official information, but it creates cost savings for clients.

Launched in 2017, we have so far captured archival snapshots of 227 websites, belonging to 108 website owners.

In May 2020, the NRS launched our COVID-19 web archive and dramatically increased our collecting operations, in a bid to capture, preserve and make available, a representative web archive of content relating to the effects of the pandemic in Scotland.

Prior to the pandemic, we had collected 230 snapshots per annum; through the efforts of the COVID-19 web archive team, we have been able to add over 3000 new snapshots to the web archive in the last 12 months, and this collecting effort continues as the effects of the pandemic ebb and flow.

As public bodies utilised social media to communicate directly with the citizen, the NRS also began social media archiving: a watershed for the NRS. Since October 2020, we have collected COVID-19-related content, from 10 official Twitter accounts, including the Scottish Government, Public Health Scotland, and Scotland’s Supreme Courts. We are able to precisely and safely capture this content via Social Feed Manager, which is provided to us as a service by Internet Archive.

Through these efforts, we hope to collate new digital historical assets for Scotland, which will be used by future generations to assess, scrutinise and understand this extraordinary period in our nation’s history.

In 2021, our focus remains on continued engagement with our depositors. As lockdown eases, we want to ensure that the records we collect for permanent preservation reflect the continuing changes to life in Scotland.

What lies ahead?

When we launched our first survey in spring 2020, like most people, we could not have anticipated the duration and depth of disruption of the COVID-19 health crisis, and how this would affect record creation management and archiving. As I write this in late spring 2021, we are beginning to see the gradual unlocking of communities, businesses and services, and with the roll out of the vaccination programme, we hope that this year will see an end to the crisis response period we have been living through. It is clear, however, that these past 15 months have been transformational for the recordkeeping community in the Scottish public sector. Future working models look markedly different to pre-pandemic arrangements, and some of the changes that have taken place will undoubtedly be here to stay, as we begin to look to a post-pandemic future.

At the NRS, we need to continue to engage with our recordkeeping community, and our archive depositors, to continue to monitor and understand the challenges and opportunities of the short-, medium- and longer-term impacts of this crisis, on our sector.
There are undoubtedly challenges, as outlined here, around future resourcing, digital issues, and the re-establishment of authority and control on many uncontrolled recordkeeping environments. Particularly in the public sector, the coming years will be challenging, as we face the economic consequences of this health crisis. The keeper will be particularly keen to learn from colleagues whether the medium-term diversification of duties recedes entirely or if ‘temporary’ COVID-19 tasks become routine. He will also want to better understand the impact digital transformation is having on pre-pandemic agreed RMPs.

Our recordkeeping community has taken a significant knock during the past 12 months, and will need some nursing from practitioners, and support from sector leaders, to transition back to pre-pandemic strength. It is clear, however, that, challenges aside, this experience also offers us an opportunity to raise the profile of records and information management. 54% of colleagues who participated in the first survey felt that the crisis offered this opportunity. Good recordkeeping has proven to be vital in supporting the home-working model; it has allowed us to continue to meet our statutory obligations under the most chaotic circumstances and it has been central to the development of future work planning.

In Scotland, we are particularly well placed to meet the challenges head on. The progress we have been able to make as a profession under PRSA is key to the future. The collaboration and co-working that over the past 10 years has become our trademark provides us with a healthy foundation from which to take advantage of new ways of working. Under the keeper’s direction, and using the powerful networking resource we have cultivated, we will share experiences and further develop our knowledge and skills. More importantly, together, we will ensure that we remain committed, whatever the challenges, to protecting the rights of Scotland’s citizens by safeguarding the records we create on their behalf.

Gillian Mapstone is Head of Records and Archives Engagement at the National Records of Scotland. She leads the services which engage with recordkeeping bodies across Scotland, in both the public and private sector, to support and develop records and archive services nationally. A registered archivist, Gill has over 20 years of diverse experience in the sector, which include roles as the NRS’ first corporate records manager, overseeing a national records review of a major Scottish public body, and as committee and panel member of the UK Archive Service Accreditation Scheme. Chair of the Archives and Records Association (Scotland), Gill is passionate about communicating the central importance of good recordkeeping to underpin accountability, democracy and identity.

<www.nrscotland.gov.uk>
Research explores pandemic’s impact on FOI in Scotland

By Joe Chapman

Freedom of information (FOI), like almost every other element of our lives, was inevitably impacted by COVID-19 and the restrictions on our normal way of life and ways of working that resulted. At the same time, however, the transparency enabled by FOI was – and continues to be – as important as ever; during a public health crisis, sharing of information can help save lives.
To establish how FOI performed north of the border during the first few months of the pandemic, the Scottish Information Commissioner and his staff carried out research into how Scottish public authorities responded, not only to new ways of working, but also to the amended FOI timescales that were in effect from 7 April to 26 May 2020.

The research culminated in a Special Report, which featured the following conclusions:

• The pandemic caused delays to some responses to information requests in 2020, but the impact on FOI in Scotland did not appear to be as significant as some may have feared. Emergency legislation temporarily extended the maximum timescale for responding to FOI requests and reviews from 20 to 60 working days. While relied on in a number of cases, this did not become the norm.

• Public authorities generally took a proactive approach to publication of information about the pandemic and their responses to it. This may, to some extent, have contributed to the reduction in request volumes seen earlier in 2020. This highlights the need to communicate clearly about change, and the role that a modernised proactive publication duty (which focuses on the public interest in information being swiftly and proactively published) should have in the future.

• Reallocation of FOI resources was the most common pandemic-related cause of delays to FOI responses – underlining the importance of properly resourcing the FOI function. Authorities must continue to focus on the need to respond promptly to requests, whatever the maximum timescale in force at the time the request was handled, as a number of the Commissioner’s enforcement decisions made to date have highlighted. Those authorities which have deprioritised their FOI function risk damaging not only their FOI performance, but also the corresponding public trust in their organisations, if these structures and resource are not restored.

Although anticipating that the pandemic will continue to have an impact on FOI practice for some time yet, the Commissioner warned that those authorities which had deprioritised their FOI function risked damaging not only their FOI performance, but also public trust, if resources were not restored to normal levels as quickly as possible.

You can read the full report, view data from the research, and find links to more information about the temporary changes to FOI law in Scotland on the Commissioner’s website: <www.itspublicknowledge.info/CovidReport>.

The Author

Joe works for the Scottish Information Commissioner, the regulator of freedom of information law in Scotland. He’s previously worked in information management roles across the Scottish public sector, and is also the Conference Director of the IRMS.

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The COVID-19 crisis has forced businesses to fast-track their digital transformation, rapidly introducing new ways of working that would have taken months or even years to implement before the pandemic.

Throughout lockdown, Iron Mountain has been busy providing companies with a wide range of innovative services, helping them maintain business continuity in a socially distanced economic environment. From digital mailrooms to remote document retrieval, digital solutions came to the rescue when normal means for creating, processing and storing physical documents were suddenly disrupted.

So, at least some positives have come out of the chaos, right?

In theory, absolutely – if these changes represent a long-term evolution towards more streamlined business processes. But there are signs that a digital backtrack may be on the horizon.
We conducted a survey with Censuswide, which revealed that despite most data handlers (86%) saying these newly digitised solutions gave their business a competitive edge, well over half (57%) fear that processes may revert to the way they were pre-pandemic. A surprising statistic in a ‘new normal’ where work is unlikely to be fully office-based ever again.

57% of data handlers believe European businesses will revert to analogue solutions post-pandemic

This paper examines the potential reasons for this counterintuitive phenomenon and provides practical guidance for businesses to ensure their digital journey remains on track. The learnings are gathered from decades of helping companies optimise their workflows to become more resilient.

Setting the scene

Business processes play a critical role in ensuring organisations function effectively. Governing the way organisational objectives are achieved, they impact every part of a business. The way information is handled provides a good example – from the mailroom and invoicing, to HR and vendor contract management, every business will have processes in place to ensure efficiency, security and compliance of their operations.

However, it is an unfortunate fact that processes in many companies are rife with inefficiency, particularly when it comes to storage costs and accessing archived files.

Transforming physical records to digital is an effective way of streamlining workflows, and has been proven to save both time and money. For this reason, most companies already have plans in place to digitise key processes. The transition, however, is often classed as a low priority, and has been gradual as a result. Until COVID-19 that is.

“Workflow optimisation may not sound all that exciting, but it adds tangible value to a business’ bottom line. If, by digitising its processes, a mortgage lender or bank is able to improve their collection rate by 1%, it could mean a revenue improvement in the millions.”

Andras Szakonyi, SVP at Iron Mountain.

The pandemic has changed everything. With remote operations now central to business survival, companies had to deploy new digital solutions in timescales previously thought impossible. According to McKinsey, the progress of digital adoption jumped 5 years into the future in just 8 weeks.

It’s an unprecedented response to an unprecedented situation. We at Iron Mountain were keen to take the pulse of the European data management function to understand the impact these new technologies are having.

In August 2020, we commissioned a survey of 1000 people responsible for managing business data in enterprises (250+ employees) in Western Europe. Our data confirmed the scale of the digital transformation taking place, while also revealing some unexpected findings.
Iron Mountain Business Process Survey, August 2020 by Censuswide

Sample: 1000 respondents responsible for data management aged 20+ in companies with more than 250 employees in: UK, Germany, France, Spain and the Netherlands.

Business processes covered:

Speed under pressure

Business processes touch every employee in an organisation, regardless of their function.

According to our survey, 96% of data handlers spend >3 hours per week on business processes, with 68% spending more than one day a week on business processes.

Despite the nature of the role and vital importance of efficient data handling, 80% said they rely on paper for their job. This indicates the scale of the challenge faced when the pandemic struck and analogue, paper-based processes became far harder to manage.

Forced to digitise to survive, organisations had to find new ways to maintain operational continuity, connect employees and customers, as well as process, protect and store data. Our findings show that IT support (49%), CRM (36%) and team resource management (34%) were the top processes digitised in response to lockdown.

Encouragingly, despite the solutions only being in place a relatively short amount of time, respondents are already seeing a number of key benefits. These include increasing productivity (the most popular response at 27%), saving time (20%), enhancing data quality (13%) and cutting costs (12%).

While hugely disruptive, these findings suggest that the adversity of the coronavirus may result in opportunities to improve process efficiency in the long term.
Fast track or stop gap?

To understand more about the longevity of these newly digitised workflows, we asked respondents if they expected new tools and solutions to remain post pandemic. In response, a staggering 57% said they feared their business processes may backtrack. This is a surprising result; why would enterprises return to a less efficient, more analogue process?

One likely explanation is that the measures put in place were ‘quick fixes’ introduced to keep the business functioning, rather than long-term solutions designed to enhance productivity.

Linked to this, given the pressure businesses were under, there’s a strong chance that rapid-fire decisions were made in silo, without considering the broader impact across business units. As a result, many organisations may find they lack the integrated solutions required to meet their fundamental business needs.

“At the outset of the pandemic, many companies were unprepared for remote working at this scale. They had to think fast and, in some cases, the digital solutions which were rushed in lack longevity. Coupled with this is an entirely human, and unfortunately wholly unrealistic, desire to go back to ‘how things used to be’.”

Stuart Bernard, VP, Global Digital Solutions, EMEA, Iron Mountain

A third reason is likely to revolve around costs. ‘Off the shelf’ quick fixes are rarely the most cost-effective way of solving a problem. But beyond this, there is a certain lack of understanding around the real costs and benefits to be gained from process digitisation – mainly because companies often underestimate the internal resources involved.

This theory is supported by our data which shows that cost is seen as the number one barrier to process digitisation initiatives (listed top by 22% of respondents).

“The benefits to be gained from true digitisation are long term in nature. Solutions like AI and ML aren’t cheap but can deliver massive, long-term benefits. At Iron Mountain, we collaborate with customers to evaluate the business case, finding ways to spread the costs over longer period.”

Stuart Bernard, VP, Global Digital Solutions, EMEA, Iron Mountain

INFORMATION AND RECORDS MANAGEMENT SOCIETY
How to move from quick fix to sustained gain

The key question, therefore, is how to ensure your new digitally enabled processes are built to last.

Gartner divides the process of resetting businesses post-pandemic into three phases: respond, recover and renew. These stages provide a useful framework for examining companies’ initial response to the COVID-19 outbreak, as well as their efforts to learn, move forwards and – above all – ensure enhanced long-term resilience.

Our insights point towards seven steps companies should take to develop optimised solutions that will stand the test of time:

1. **Gather insights** The COVID-19 pandemic allowed organisations to test and learn. Companies should ensure these insights are fed into developing more robust solutions.

2. **Use governance as intelligence** Information governance and compliance are fundamental to data handling. But frameworks aren’t just a set of rules, they hold valuable insights that can be turned into actionable intelligence. Explore your framework to extract learnings.

3. **Understand your risk profile** A key early step is to analyse where you are most vulnerable. With data in motion and people working remotely, which records are at risk? What could be moved into the cloud? Are your vendors resilient?

4. **Focus where you will achieve greatest impact** To prioritise successfully, you need to know where you will achieve the largest impact. This involves looking beyond initial set-up costs towards the holistic benefits of digitisation, including reducing time spent on manual scanning, and the risk of compliance violations.
Reach out and collaborate We are all in this together. Your IT, security, compliance and facility management teams are all facing the same challenges. Ensure you collaborate across functions to develop robust, integrated solutions.

Find a provider who can relate to your digital journey For companies that still rely heavily on analogue solutions, digitisation can be daunting and risky. It pays to find a vendor who has been on the same journey, understands your paper processes and can guide you through the digital world.

Prioritise and evolve communication and training programmes To reap the full rewards from any digitisation initiative, thorough and continuous communication and training is critical. Encouragingly, our survey found that 81% of data handlers have received training to work digitally, which is an excellent step in the right direction, but consider teams beyond data handling to truly succeed.

Case study
Sandwell and West Birmingham Hospitals NHS Trust wanted to dispense with costly, labour-intensive paper archives. Iron Mountain was called in to design a fast and secure solution to digitise all patient information.

The new, automated retrieval process has slashed man-hours. Online orders for legacy records are supplied as digital images within 72 hours, and episodic files updated and made available 48 hours after an appointment.

As a result, the Trust has been able to reskill and redeploy 20 administrative staff and is on track to save £250,000, which can be re-directed towards frontline care.
Make change last

According to Gartner, our ‘new normal’ will see more than three-quarters of companies (82%) move towards part-time remote working. This means that the days of physical access and delivery of paper-based files are numbered. Fundamental business processes must adapt, whether we like it or not, and this requires a new way of thinking.

Unsurprisingly, it’s not a simple flick of a switch. Whilst the pandemic forced companies into short-term fixes, our survey indicates that many lack the confidence to turn these into long-term solutions. This is entirely understandable when you consider that digital transformation is a journey.

But now is a critical moment.

If you want to remain competitive, settling back into the old mode is simply not an option. Take it step-by-step – analyse your risk profile, collaborate across functions and consider working with specialist vendors who can support you in your transformation.

The journey can be daunting, but you are not alone. All businesses face similar challenges. At Iron Mountain, we often begin with a ‘Clean Start’ programme, analysing a company’s existing processes and identifying enhancements that are adapted to their needs and progress in their digital journey.

Critically, the approach we advocate isn’t just advice for a pandemic. Maximising your operational resilience every day is key to staying ahead of the pack.

“Whilst it’s human nature for people to want to go back to how things were, we must move forwards. Companies need to be honest about where they are now and where they want to go. They must establish a clear roadmap for their digital transformation. And this starts by enabling teams to work digitally, rather than simply throwing new technology at them”.

Andras Szakonyi, Senior Vice President EMEA at Iron Mountain

The Author

Stuart Bernard was appointed as Iron Mountain’s Regional Vice President of Global Digital Solutions in EMEA in October 2019. He currently oversees a wide range of strategic and operational elements relating to Iron Mountain’s digital capabilities – including sales and operational performance, technology development, and future innovation. Stuart has 10+ years of experience leading teams in the IT and services industry.

<www.ironmountain.com>
Dealing with incidents of fire and water damage to documents is often a major challenge for information managers and archivists at the best of times, but the emergence of COVID in 2020 compounded these challenges. Emergency plans, written pre-pandemic, required rapid revision. With the vast majority of staff responsible for records working remotely, discovering incidents and effective response now relied on skeleton onsite teams with little awareness and training.

The team at Harwell Restoration have still been busy throughout the pandemic. We’ve dealt with damage triggered by flooding, escapes of water, sewage leaks, snowmelt, fires, sprinkler mishaps, ceiling collapses, infestations by rodents and insects, and mould growth. The challenges of COVID have required revision of emergency plans, but will, even as we return to a more normal working pattern, potentially make emergency plans more resilient.

The most obvious pattern we noticed was an increase in water-damaged documents with severe fungal growth and secondary damage over the summer. At Harwell, the substantially lower volume of projects in April and May was reversed by a higher than normal volume of projects in June and July. Delays in discovering water damage will inevitably lead to further deterioration through mould growth, page adhesions and ink migrations. The severe fungal growth suggests these incidents occurred weeks prior to discovery.

Although most institutions did instigate checks of storage spaces by security/facilities teams who were on site, their checks were less frequent. Whilst major flooding or a fire is very obvious, escapes of water can be more difficult to spot. A puddle of water on the floor from an escape of water would have time to evaporate, leaving wet boxes on shelves unnoticed. Only when records managers were tentatively allowed back to work was damage spotted – often due to the virulent mould and odour. Such documents are still restorable, but the process more complex and costly, owing to the increase in damage.

During the summer, we held dozens of free Zoom sessions for customers, advocating the inclusion of facilities and security staff, stressing the importance of rapid detection of damage and what to look for. In the long term, a closer working relationship between those responsible for buildings and those responsible for documents will have positive effects – more eyes and ears monitoring for...
problems, and a greater understanding of the need for rapid response when incidents do occur.

We have also seen customers experience fluctuating capacity to deal with incidents themselves. Many institutions can cope with a certain amount of damage to documents in house, but retain companies such as Harwell to deal with bigger incidents, where they run out of resource – eg, floor space to spread documents out and people to assist with triage and salvage. Many institutions have found this capacity has varied significantly during different stages of the pandemic. During the lockdowns, a benefit has been greater space, as public areas such as restaurants and reading rooms are freed up. However, as lockdowns eased and building occupancy increased, capacity decreased as any available space was used to boost social distancing.

In the long term, greater sensitivity to capacity to deal with incidents in house, and knowing the tipping point where external help from companies such as Harwell might be needed, is very helpful, as it facilitates rapid and decisive action. It avoids scenarios where individuals plough on, trying to salvage themselves, only realising days later when mould growth is established that the quantity was never realistically manageable.

There have been positives and negatives. Recoveries from city centres – a breeze in terms of traffic! On the flip side, it’s far harder to weed out anything not required for restoration, when the key decision-makers can’t all be in the same room with the records in front of them. Dynamic decision-making in fires and floods, with or without pandemics, can often be a challenge, but perhaps a long-term positive of this difficult year will be that we’ve all had to adapt. We’ve had to be pragmatic, compromise, deal with the unexpected, keep a sense of humour, focus harder on good communication, stay calm and keep people safe – all of which come in handy in fire and flood situations too.

The Author

Emma Dadson is Key Account Manager for Harwell Restoration, the leading service provider of document restoration in Europe. Emma has been twice named the ‘Business Continuity Consultant of the Year’ at the Business Continuity Awards and is an accredited Disaster Recovery Technician, Specialist Restorer and Honorary Fellow of the BDMA. Her book Emergency Planning and Response for Libraries, Archives and Museums (Facet Publishing) was published in 2012.

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How COVID will change warehousing and distribution forever!

By Debra Wilkins

Certain parts of the COVID impact – wearing masks, keeping a 2 metre distance from others, remote working/learning – are (fingers crossed) temporary. But the impact of COVID on the warehouse is going to be long and lasting. As the virus spread throughout the world, we saw a ripple effect; an outbreak or transportation delay in one part of the world had a devastating impact across the globe, causing shutdowns due to warehouse closures or missing or delayed supplies. The global supply chain fought to keep up as the virus spread.

At the warehouse, some organisations were left with excess inventory they couldn't ship sitting in inventory, while others were at a standstill, as they waited to receive inventory at their depleted warehouse. Combining this supply-chain nightmare with unpredictable consumer behaviour – some industries saw unprecedented demand, while other industries saw demand plummet – left warehouses in a bind.

Even after COVID is no longer a threat and the mask mandates go away, social distancing will continue. It might not be 2 metres, but warehouses will continue to keep workers spread further apart than they were pre-COVID. This includes keeping and maintaining the one-way traffic aisles, sanitisation stations and designated work areas. Keeping these precautions in place prevents the spread of a future pandemic, as well as the common cold or flu viruses. To ensure the overall health and safety of the workforce, some form of social distancing is here to stay.

Prior to the pandemic, most manufacturers had adopted lean manufacturing as a best practice.

Receiving goods just in time (JIT) for manufacturing kept inventory costs down and utilised space more efficiently. When COVID hit, this lean strategy left many manufacturers with inventory shortages and, in some cases, caused production to stop completely.

While lean manufacturing will remain a best practice, the balance between JIT inventory and safety (buffer) stock will change. To prevent future inventory shortages leading to production shutdowns, manufacturers will keep more inventory on hand than before. Exactly how much more is up for debate,
such as issues around Brexit, but overall inventory on hand will increase.

This will only escalate warehouse space and capacity issues. Many warehouses struggled to make space for social distancing, and now they will need space to manage this additional inventory.

Warehouse automation has been gaining steady traction for years, but, like many things, COVID will speed its adoption. As warehouses cope with adjusting inventory counts, making space for work in process (WIP), speeding up order delivery, implementing social distancing and decentralisation, they will turn to automated storage and retrieval systems (ASRS) to help reclaim floor space and improve the efficiencies of their workforce.

ASRS can recover up to 85% of existing floor space, when compared with standard shelving. Warehouses will need this additional capacity to meet post-COVID challenges. Combined with pick-to-light systems and integrated inventory management software, ASRS can also help warehouses solve labour challenges and manage unpredictable spikes in order demand.

Post-COVID warehouse and distribution centres will be focused on agility. They will utilise technologies that can change picking strategies instantly and handle big swings in demand. To further improve efficiencies, companies will leverage software solutions to connect technologies throughout the warehouse for a more holistic and efficient order-fulfilment process – from receiving and storage to picking and shipping.

As warehouses look to position themselves for the future, automation will be a key factor.

As we settle into our post-COVID lives, the only thing that is certain is that nothing is certain. Companies are creating back-up plans for their back-up plans. With an unpredictable future, warehouse and distribution centres will look to be as adaptable and flexible as possible. Their main focus will be on how to best utilise space and efficiently manage their biggest expense – labour. It’s time to start thinking long term. As we try to navigate our lives in today’s new ‘normal’, Kardex has a prepared a paper covering 15 ways COVID will impact warehousing and distribution forever. Please feel free to download the free paper: [https://info.kardex-remstar.com/en/15-ways-covid-will-change-warehousing-forever](https://info.kardex-remstar.com/en/15-ways-covid-will-change-warehousing-forever).

The Author

Debra Wilkins is Regional Director MarCom for Northern Europe at Kardex Remstar, a global developer of automated storage and retrieval solutions. Kardex currently services more than 20,000 installations across the UK and is helping retailers to optimise their storage and picking through automation. With more than 30 years’ experience and an early member of the UK Women in IT Steering Committee, Debra is a seasoned veteran in understanding and relaying the benefits of technology, with articles in many computing magazines, such as Network Computing. She is also a fully qualified counsellor and as such has spoken at conferences on how automation is not only inevitable, but also is changing the way businesses and society interact with each other and how employees can manage change.

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Three ways to ensure privacy during a pandemic: What links COVID-19 to new regulations?

by Gwendoline Huret

The past year has been both interesting and challenging, and in my conversations with executives in data management across global companies, two recurring concerns are commonly mentioned. The first is unsurprisingly the impact of coronavirus on their company and their role. Typically, organisations have completely changed their way of working with data this year for one simple reason: employees are now accessing it directly from home. This poses a series of infrastructure and security issues that must be resolved in accordance with enterprise record and data management policy.

The second issue has been around for longer, but continues to pose concern for many compliance officers, legal representatives, or even IT security experts: privacy. So, what do these top records management concerns have in common, and can they both be addressed together? In this article we will illustrate that opting for a strategic data management portfolio can help kill two birds with one stone.

Part I: The impact of COVID on data management

Unexpected times call for unexpected measures. The ‘new norma’ from an IT perspective is now clearly remote working. Offices that do open must respect strict cleaning and social distancing protocols, which often lead them to encourage workers who can do so to continue working from home. Whether for the protection of employees or customers, meetings are being held virtually, and every activity that can be done through a remote call is done that way.

In society, healthcare has become crucial. In most organisations now, so has a strong IT department and data management strategy. Technology is what has enabled companies to somewhat withstand this pandemic, and it should be clear in everyone’s mind that technology is what will differentiate the successful outliers.

Let’s be specific: in a world where a pandemic imposes remote working, the necessary technological tools must be made available to enhance and provide a seamless working from home experience. These tools and corresponding strategy should cover three core areas:

1. Communication
2. Secure identification
3. Collaboration and secure data access

More on these later.
Part II: The impact of privacy on data management

Privacy, or risk minimisation, has always been a relevant topic for executives, but the importance and recognition of having a data management strategy revolve around privacy leapt to the world stage in 2016 with the appearance of the EU GDPR. Since then, countries around the world have followed suit, some with more or less strict equivalents. In Turkey, the national KVKK law proposes jail time as a consequence, along with a fine, certainly enough to motivate most stakeholders in protecting themselves! Our company has seen a huge rise in privacy projects in Turkey since that law, including managing data for the world’s largest airport.

So again, although privacy has always been present, projects usually follow a push from local regulations. And the trend is that the spike in privacy projects usually has a 6-month to 1- or 2-year delay, again depending on geographical aversion to fines and risk. Different cultures will interpret these regulations as more or less important, particularly regarding the reputational effect on their customer base. The Anglo-Saxon culture is certainly one to pre-empt regulations and mitigate risk as far as possible.

These local ‘pushes’ from regulation are only increasing, as we have seen privacy laws blossom in the past year\[1\]. Both California and Brazil’s privacy laws came into effect in 2020, but other countries whose laws appeared a few years ago are only just starting to value privacy and begin implementing these projects. I once spoke at a customer event in the USA where 75% of customers said they were starting or looking to start a privacy project in 2019.

The impact of privacy on data management largely revolves around the need to understand risk. Stakeholders want to measure ‘where they are now’, meaning understanding how much unprotected sensitive data they possess, in any format. This requires a discovery or classification step, which, depending on the format of the data, may require extra functionality, such as rich media processing. Stakeholders then want to view this ‘risk’ summarised from one interface, to easily report on it, and finally be able to remediate the situation by acting on it. These actions usually take the form of legal holds, encryptions, moving data to a secure location, deleting data, and so on. The important focus here is on giving the business user access to these decisions, such as “we shall be moving all contracts before 2010 to this location and keeping them 5 years past expiry”. This role should not be played by IT.

In accordance with privacy regulations, I have noticed a trend in the need for a ‘data inventory’ as opposed to a ‘data archive’. Data inventories keep track of what data types are present in an organisation and where they are, as well as how they are being managed. It takes data management to the executive level, and also aligns better with how regulators want to receive reports on ‘purpose of processing’ (the number one reason for GDPR fines in the EU remains ‘insufficient legal basis for data processing’ \[2\]. Companies are not just being asked to protect sensitive data, they must now justify why they are processing such data in the first place. It is a different way of thinking and classifying data.
Part III: Commonalities

Privacy and COVID-19 responses should obviously be organisation-wide. But data management really has a lot to offer both these requirements, which have more in common than you might think.

Interestingly, both the COVID-19 and privacy concerns have followed the trend of inspiring new job roles and even entire committees in certain organisations. Most are now familiar with the ‘Data Protection Officer’, the new role suggested by the GDPR as responsible for assuring compliance with it. I have seen many different profiles being assigned this role, but always data management becomes their immediate top concern once they learn that theirs will be the head rolling if a fine were to materialise. The coronavirus pandemic has similarly inspired the creation of steering groups and even COVID company newsletters in some cases.

Privacy and COVID-19 impose very similar data management changes which we shall now discuss. In fact, in some cases, the overlap is very evident. Recently, I hosted an airline workshop inviting airlines across the world to discuss their privacy concerns. Coronavirus was top of the list in this conversation. Airlines or airports are gathering health data from their passengers, in some cases measuring temperatures and in others collecting forms that certify passengers are COVID-free, and the concern was on how to process and hold this data. If you think this is an airline-specific problem, think again. How many organisations are now testing their staff for signs of the virus? This has serious implications on the management of this type of data: after all, what you are collecting here is personal data. How are you going to legally justify holding this information, how are you going to classify it?

Part IV: Solutions

We’ve already established a technology protocol for coronavirus above:

1. Communication
2. Secure identification
3. Collaboration and secure data access

Although the first point is specific to working from home, the second two happen to be crucial to the privacy strategy of a company. The two must be tied together.

1. Communication:

Common sense is in order here. If people are to work remotely, they must be able to connect and communicate remotely. A technological solution here includes webcams, headsets, and the right communication software. Tip: If your employees enjoy using it, collaboration will be stronger.

2. Secure identification tools

Here is where our two Ps, pandemic and privacy, really meet. To communicate remotely and share materials remotely, secure identification is a must for COVID. It is also a must to respect privacy regulations and make sure sensitive information is not leaked. To illustrate this, consider the rise in cyberattacks [3] during confinement, which represents a security threat. The relationship here is: COVID makes privacy harder and makes it more relevant (consider the airport example of storing health data).

Therefore, identity and access management technology are crucial here. I would also suggest that previous behavior analytics and monitoring technology need to be re-configured to take new COVID patterns into account. For instance, previous algorithms
may have inspected someone who logged on regularly at 10pm. Most of my colleagues with children at home find this is now their optimal working time. New algorithms may be needed.

3. Collaboration and secure data access tools

This is at the heart of a ‘privacy in a pandemic’ play. How can we ensure data is securely accessed and shared in a work from home environment?

First and foremost: encrypt your data. This is the easiest way to comply with privacy regulations, and usually the fastest and cheapest way to eliminate risk around data. Encryption could mean tackling new or pre-existing databases, or it could mean that you want to ensure that the PDF on your employee’s laptop does not get sent outside the organisation. Consider a vendor who can tackle all these scenarios.

Next: to be secure, you must audit. Know who is accessing your data and what they are doing with it. Standard records management mentality applies here. This implies granular document or data level security.

Mobility is key here. Data should be accessible remotely, otherwise you comply with the privacy but not the pandemic. A records management solution here should be accessible through tablets or smartphones, and should make sharing easy, within or outside the organisation, whilst still respecting security policy.

Higher maturity organisations can take it one step further and automate policies applied to their data based on its content or sensitivity level. This requires a classification step using discovery technology, and for this I highly recommend a tool that can discover but also then act on data. For instance, you can configure the tool to encrypt any document with personal information in it. You can configure it to also archive and secure data with financial information in it, and then securely delete this information 7 years later, or the next tax year as per the jurisdictional policy.

Part VI: Benefit from it too

The difficulty of any compliance or risk mitigation role is that you are only noticed if you have done your job badly. If you wake up to your name in a headline, it is not likely to be good news. So, I want to take the opportunity to highlight the visible, cost saving benefits of a privacy in a pandemic data management implementation.
Data management technology can actually provide a clear ROI, especially in these economic times which are also a consequence of coronavirus.

There are two main areas of visible cost savings here: storage and license fee reduction, and a more productive workforce.

The ‘discovery’ exercise mentioned for privacy, followed by archiving, deletion of old data, and even perhaps application retirement, can produce some great savings.

And allowing data to be classified, and easily accessible and shareable from one interface, will lead to measurable performance improvements. The most direct example is the call centre: when having to access customer information from one unique source, rather than all the silos gathered over various mergers and acquisitions, one customer was able to significantly improve response time to customers. Whenever I am frustratingly put on hold with such call centres, I am often tempted to sell them our software.

Conclusion

When tackling a data management concern, such as privacy or COVID-19 resilience, our industry experience recommends implementing a thorough data management technology portfolio that can help address these issues and more. With regulations and external circumstances constantly changing, your data management strategy should be long-term if it is to be effective. Look for a portfolio vendor who can provide for future needs within your existing platform and develop a strategy that can withstand variations in regulations. Alternatively, having to change data management solutions and technology with every regulation change would simply be too costly and unrealistic in terms of timeline. Key to a long-term and resilient data privacy solution is flexible product functionality which can be configured by the business user themselves, and mobile-accessible tools for a mobile workforce.

The Author

Gwendoline Huret has 9 years of experience in Enterprise Software for Data Management, working at HP, HPE, and Micro Focus. She has specialised in privacy and cybersecurity since the start of the GDPR in 2016. She has worked on data management projects across the globe, first in sales and now in product management. Gwendoline has a master’s in Engineering and is based in Madrid, Spain.


Originally published in IQ RIMPA magazine
The first British School of Librarianship began at University College London (UCL) in 1919, and our first students graduated in 1920. Over this centenary year, we worked on a community project to develop an online exhibition entitled ‘Geographies of Information: Celebrating 100 years of UCL Department of Information Studies’, which explores the history of the department and the role that teaching and research has played in the creation of an international professional workforce over the past decades. As well as the virtual exhibition tour, there is a timeline with key events and items from the archives and a series of podcasts from former staff and students (you can take the tour at <https://uclinformationstudies100.org/>). We also published the Centenary Publishers’ Prize volume on the theme of libraries.

In November 1917, the President of the Library Association (LA), Sir John MacAlister, wrote to the Provost of UCL “to enquire whether it would be possible to institute at University College a School of Librarianship … to be established in co-operation with the Library Association”. The Director of the London School of Economics (LSE) commented at the time that “the number of new recruits to librarianship … was so small as to preclude any hope of making an institution of the kind successful”: I am pleased to say that over the past century we have proved that prediction to be wrong! The School for Librarianship at UCL was established with funding from the Carnegie Trust and in collaboration with the LA. Dr Ernest Baker, Secretary to the Education Committee of the LA, was appointed as the first Director, and Sir Frederick Kenyon, Director and Principal Librarian of the British Museum, delivered the opening address in October 1919. We had a very large intake in the first year of 88 students: many students were, and still are, female, a distinctive characteristic of librarianship and cognate disciplines which continues to the present day.

During the second world war, the School of Librarianship was suspended, but it re-opened in 1945. The new director, Raymond Irwin, reported that “the demand for places was stimulated by the flow of students from the Services and the provision of grants … many libraries have been replenishing or expanding their staffs, and successful students have found little difficulty in obtaining suitable posts after training”. Sir Hilary Jenkinson, Deputy Keeper of the Public Record Office, took the opportunity to petition the Provost of UCL to establish “a School of and Diploma of Archive Science”. It took 2 years to get the proposal through the college and university bureaucracies, but, in October 1947, the University Diploma in Archive Administration began. Jenkinson gave the inaugural lecture on ‘The English archivist: A new profession’. The School was re-named the ‘School of Librarianship and Archives’. Over the next few decades, we added more disciplines to our teaching and to our title: in 1972, we began an MSc in Information Science and added ‘Information Studies’, becoming SLAIS.

Digital Humanities emerged under Professor Susan Hockey, who joined us in 2000 as Director. She established the new master’s in digital humanities. Susan is among former staff who agreed to be interviewed about her work, as part of our Centenary, so you
can hear more in her podcast. Our fifth discipline is publishing: in 2006, Professor Iain Stevenson established the UCL Centre for Publishing and the MA in publishing. However, by this time, we had given up trying to fit ever more subjects into our title: in 2009, we became the Department of Information Studies (DIS).

There are many aspects of our history which have yet to be explored, not least the intellectual contributions we made in emerging fields, such as knowledge organisation. Mary Piggott’s work on cataloguing and classification, Professor Ia McIlwaine’s work on classification and bibliographic control; Emeritus Professor Broughton’s classification research on the structuring of terminologies; and many of our students, including Jean Aitchison, who was a pioneer in the field of thesaurus construction and the use of facet analysis in building controlled vocabularies; and, of course, S R Ranganathan, who developed the first major faceted classification system in the 1920s, among his many other achievements.

Now, DIS offers new insights into contemporary debates in our information and data-rich society. We lead interdisciplinary research collaborations using critical research approaches to solve complex information problems, grounded in a distinctive coalition of researchers, combining social science, humanities and computer science scholars with expertise across information studies. We have a unique portfolio of international professional master’s programmes in librarianship; archives and records management; knowledge, information and data science; digital humanities; and publishing and teach modules on the BSc information management for business. Our doctoral programme, established in the 1960s, trains the next generation of researchers and information professionals. Our doctoral graduates progress to key professional posts in national archives, libraries and cultural institutions around the world, as well as academic iSchools on several continents.

Recent cross-disciplinary research has led to improved discovery and re-use of digital cultural heritage, employing interdisciplinary approaches to develop innovative technology tools to bring citizens into cultural heritage institutions and facilitate scholarly access. For example, the Enlightenment Architectures project is working with the British Museum using computational interrogation to enhance understanding of the intellectual structures of the catalogues of Sir Hans Sloane, whose collections were the foundation of the original British Museum, the world’s first public museum. We also run research projects with significant public policy impact, such as Academic Book of the Future, which explored how scholarly work in the arts and humanities will be produced, read, and preserved in future; MIRRA research was co-produced with care-experienced adults to explore their information access rights and led to a new website for care leavers, FamilyConnect; and the CeLSIUS and UK Data Service projects, which facilitate access to the Office of National Statistics Longitudinal Study and to UK decennial Census data. We look forward to the next 100 years!

The Author

Professor Elizabeth Shepherd is Head of the Department of Information Studies at UCL. She researches in the field of archives and records management into the 20th century development of the discipline and into the impact of recordkeeping on the rights of individuals in society. Currently she is leading the MIRRA project—a participatory research project, co-produced with care leavers, that explores issues around how social care records in England are created and kept and the challenges care leavers face when accessing their records.
Book review: 
UK GDPR Handbook
Edited by Ibrahim Hasan (Director of Act Now Training Ltd). Published April 2021.

By Jamie Burton

Now that the UK has exited the EU, the UK’s primary data protection legislation is a revision of the GDPR, known as the ‘UK GDPR’, working in conjunction with an amended version of the existing Data Protection Act 2018 (DPA 2018). As any data protection professional knows, navigating this legislation isn’t always an easy task – I can’t be the only one who ends up with multiple browser tabs, flicking between a variety of reference sources, including the EU GDPR and its recitals, the DPA 2018, and the Keeling Schedule (which shows the amendments to UK law).

This new handbook from Act Now Publishing, and edited by Act Now’s Director and Founder Ibrahim Hasan, includes the text of the UK GDPR and relevant sections of the amended DPA 2018, set out in a clear and easy to read format. It also cross references the EU GDPR recitals (which also now form part of the UK GDPR), which makes for a much easier read. It’s easy to identify the various amendments, insertions and deletions from the EU GDPR by the colour coding used throughout.

Handily, links to guidance from the ICO, Article 29 Working Party and the European Data Protection Board are included throughout.

However my favourite features are the tabs, which mean readers can quickly jump to the relevant section. I’ve been road-testing the handbook for weeks now, and I’ve consulted it most days – and it has assisted me in working through those tricky data protection conundrums more efficiently than relying on multiple Internet bookmarks.

One thing the book doesn’t include is any additional guidance or interpretation of the legislation – meaning it’s ‘just the facts’, which to my mind is a good thing – there are plenty of other publications which work through the law and advise on implementation and other practical matters.

So in a nutshell – I highly recommend this useful handbook to fellow data protection and information governance professionals, who just want the legal text – structured in a logical, easy to navigate way.

To purchase the book, visit <www.actnow.org.uk>.

The Author

Jamie has 20 years’ experience of working in data protection and records management, in a variety of sectors, including local and central government, social housing, oil & gas, emergency services and financial services. He is former Editor of the IRMS Bulletin, and is currently Data Protection Consultant for Handelsbanken in the UK, supporting their UK banking operations in complying with data protection requirements.

<www.handelsbanken.co.uk>
IRMS Public Sector Group: Facing the Brave New World

By Elizabeth Barber

“It was the best of times, it was the worst of times, it was the age of wisdom, it was the age of foolishness, it was the epoch of belief, it was the epoch of incredulity, it was the season of Light, it was the season of Darkness, it was the spring of hope, it was the winter of despair, we had everything before us, we had nothing before us” (A Tale of Two Cities, Charles Dickens)

It may be that the opening lines to a Tale of Two Cities, have been over-used since the beginning of the pandemic, nevertheless they open a window onto the development of the Public Sector Group since March 2020. We were due to meet, in person, on March 20th at the Westminster Archives Centre, and I watched anxiously as the number of coronavirus cases was rising and in the end I made the very difficult decision to cancel the event, thinking that we would re-convene later on in the year.

Now, 15 months on, we have experienced really exciting developments in the provision of content to our members all over the globe. The one thing that our membership have talked about missing, is the in person contact and sharing of ideas, and whilst we might be moving towards the realisation that whole day events no longer fit the needs of the membership, we are looking actively at how we might start to provide an in-person event as soon as it is safe to do so.

At the beginning we as Group Chairs were starting to explore how we might continue to provide content and support to our membership. The purchase of the Livestorm platform allowed us to offer on line webinars. Learning how to set up and use Livestorm involved a tremendous amount of work on the part of the Exec and the Groups. Sadly, it coincided with a close family bereavement and I had to take some time out, so I would like to offer my heartfelt thanks to Sarah Graham, who stepped in and took over the Livestorm management for the Public Sector Group. It meant that we were able to move into providing online content within a few weeks of the system being available.

We were delighted to be able to welcome the three speakers who would have spoken at the event on March 20th. Robert Bath starred at our premiere in May, followed by Randy Smart Perkins and Richard Jeffrey-Cook. These speakers were all covering different aspects of M365 from managing in Teams to data security. Scott Sammons also joined us to share his expertise on the “Power of 3 covering ROPA, Information Asset Register and Retention Schedule”. We were very excited about the number of delegates who signed up for these sessions and made us stop and think about how this might work in the future rather than just as a response to the pandemic.
We put the webinars to one side in the Autumn to support the launch of the new Schools Group and the review of the Toolkit for Schools. Technical issues meant that we had to cancel our November presentation by Helen McElroy which we rescheduled for January 2021. This highlighted the fact that technology can reflect some of the issues we’ve had in person when speakers have got stuck in various parts of the rail network.

We ended the year with a session with Paul Gibbons considering the impact that the pandemic will have on freedom of information requests.

After a lot of hard thought and trying to second guess what might happen in 2021, we decided to move PSG on-line for the whole of 2021, to allow us to do some consistent planning, and so far we have enjoyed a variety of presentations from the importance of standards given by Alan Shipman to AI and Records Management with Scott Sammons. In the most recent presentation, Paul Duller shared his thoughts about managing working from home and all that entails.

Although we have had our share of technological problems, on the whole our experience with Livestorm has been very positive and has prompted us to start looking at the brave new world which will emerge post-pandemic.

As with so many things, it is unlikely that PSG will go back to its pre-pandemic format and there are a number of reasons for this, many of which have nothing to do with the pandemic. We had started to notice through 2019 that our membership was finding it harder and harder to get out of the office for the whole day and were starting to choose the content they wanted to access. Personal commitments also make it difficult for some of our membership to travel to the venue. Add to this the almost certain consequences of the tightening of purse strings in the public sector will reduce the amount available for paying travelling expenses and the pattern starts to emerge about the benefits of online content provision. We had already been getting requests to record sessions prior to the pandemic. On-line provision also means that we can provide content to our members who are not resident in the UK and therefore find it difficult to travel to in person events.

The benefit of maintaining an online presence can be summed up in one word “flexibility”. We are able to offer smaller groups of content which our members can access from their desks wherever they are in the world. It also expands our potential to approach speakers, as they no longer have to travel to the event. And of course, where appropriate we can offer recordings.

With these advantages moving forward, we are looking at putting together a mainly online programme in 2022, although we would be pleased to hear any suggestions that our members have about this. However, we are very aware that the networking aspect is also very important to our members and we have discovered it’s just not easy to recreate those opportunities on line. So, we will be looking at trying to create a safe in person event in 2022 which will meet the needs of our delegates. We are also looking at the possibility of harnessing some of the available time at Conference to bring PSG members, who are able to be there, together.

What we need now is your feedback, we’re getting the feeling that people in general are struggling with the amount of on-line content available and are starting to become fatigued by an on-line presence. I have heard it described as Zoom-fatigue but it could equally be badged as any form of electronic meeting software fatigue. We want to be able to get a balance between on-line content provision and in-person events.
We would love to hear any comments you may have about our proposed “brave new world” and how it could be improved. Please message us via the IRMS Public Sector Group pages or email us on <psg@irms.org.uk>. Or why not post your ideas on the PSG forum or blog and start the conversation. We will also be publishing the usual questionnaire in the autumn, but if you have topics you want to see covered or speakers you want to hear please let us know at any time.

Sarah and I will be starting to plan the 2022 programme in the autumn, so now is the chance to let us know what you think.

Elizabeth Barber  
Chair – IRMS Public Sector
More than half of UK businesses ready to speed up their digital transformation journey due to pandemic.

British businesses are ready to further embrace digital transformation according to a survey, which indicates that 56 per cent of companies are speeding up plans because of the pandemic.

With so many employees working from home, and a battle to get back on track after a year of turbulence, businesses are realising their processes and systems are potentially outdated and in need of an overhaul.

The survey, commissioned by Crown Records Management, revealed:

• 32% are planning digital transformation in the next 12 months to cope with the new normal.
• A further 24% plan to act within 5 years.
• 66% say the pandemic has made the C-Suite in their business recognise the importance of digital transformation.
• 30% say allowing employees to work at home efficiently is now a key driver for them.
• 27% do not view their business as having already ‘gone digital’.

David Fathers, Regional General Manager at Crown Records Management, said: “There was already a big desire from UK businesses to develop a digital strategy even before the pandemic, driven by a demand for improved data security and a need to be more competitive in the market.

“But these survey results show that companies now want to increase the pace of change because of the events of the last year.

“Having so many employees working from home has shone a light on the inadequacies of systems currently in place in many companies, of all sizes. Employees have found that information has been difficult to track down and slow to access.

“There’s a myth that Western countries such as the UK are so far ahead in the digital field that most businesses have already undergone digital transformation.

“The results showed that only a quarter of businesses have fully digitised all their back-office functions, which means there is still a long way to go.”

The survey, undertaken by Censuswide, polled 401 decision makers at companies across the country with between 250 and 5000 employees.

David Fathers added: “We also asked whether people considered their business as having already ‘gone digital’ and surprisingly 27% said ‘no’.

“That figure was even higher in London at 30% and highest of all in companies of between 250 and 500 employees – at 46%. It is vital that businesses begin the digital journey soon. The benefits are compelling.

“Digital solutions can help a business become more efficient, save time and money, and make it simpler for employees to do their job - and that’s even before we begin to think about compliance and data security, which are huge business challenges in the modern world.

“Perhaps it has taken the pandemic for some boardrooms to wake up to the importance of digital transformation, but if the intentions set out in this survey become reality, it can only be a good thing for UK business.”
To manage the increasing demand within the digital arena, Crown Records Management has appointed Antony Biondi as its first Head of ECM to drive the business forward in its support of clients on their digital journey.

Antony has 13 years of experience in the field of Enterprise Content Management (ECM), having worked for a number of leading organisations in the ECM field. He is tasked with enhancing Crowns digital offering and establishing the business as a leader in the field of digital consultancy and solutions.

He said: “It's an exciting role, at a pivotal time. Companies are increasingly looking for new answers to old business problems, as our survey shows. There is a real energy building, as companies are working out how to deal with new ways of working, caused by the pandemic, whilst controlling and protecting the exponential growth of information generated on a daily basis.”

“I have worked in the ECM space for many years and I am passionate about supporting customers through these challenges.”

For more information about Crown Records Management, please visit: <www.crownrms.com/uk>.

COVID-19 Archives Fund grants awarded

The National Archives have announced the successful applicants who have received funding from the COVID-19 Archives Fund. 25 archives from across England, Scotland, Wales and Northern Ireland have each received up to £50,000 from the fund.

The fund, which was allocated £500,000 from HM Treasury, will allow archives to secure physical and born-digital records that are at risk of being dispersed or lost. This government support comes at a time when many organisations are struggling to deal with issues related to their collections which have arisen as a result of the COVID-19 pandemic.

Culture Secretary Oliver Dowden said: “It is so important to protect our nation’s history for future generations to learn from and enjoy.

“I am pleased that this funding will help preserve collections across the length and breadth of the Union for years to come, and I thank The National Archives for their work on this project.”

Jeff James, Historical Manuscripts Commissioner and Chief Executive and Keeper, The National Archives said: “We cannot underestimate the importance of this funding and the support it gives to the successful archives. Records which were under threat will now be saved and preserved allowing future generations to research and learn from them. This is a very practical demonstration of our support to the wider archive sector.”

The fund was open to both recognised collecting institutions and other archival custodians and will help them safeguard their vital records or re-home other vulnerable collections. The government grants will offset some of the practical costs of the planned interventions, such as storage, conservation, transport and expertise.

A full list of the recipients of this funding can be found here:

The Information Commissioner’s Office (ICO) has fined the Conservative Party £10,000 for sending 51 marketing emails to people who did not want to receive them.

It follows an ICO investigation relating to emails sent from the Conservative Party in the name of Rt Hon Boris Johnson MP during the 8 days in July 2019 after he was elected Prime Minister. The emails were addressed to the people they were sent to by name and promoted the party’s political priorities, with the last sentence including a link directing them to a website for joining the Conservative Party.

Stephen Eckersley, ICO Director of Investigations, said:

“The public have rights when it comes to how their personal data is used for marketing. Getting messages to potential voters is important in a healthy democracy but political parties must follow the law when doing so. The Conservative Party ought to have known this, but failed to comply with the law.

“All organisations – be they political parties, businesses or others – should give people clear information and choices about what is being done with their personal data. Direct marketing laws are clear and it is the responsibility of all organisations to ensure they comply.

“The sending of nuisance marketing emails is a real concern to the public and the ICO will continue to take action where we find behaviour that puts people’s information rights at risk.”

The ICO found the Conservative Party failed to retain clear records of the basis upon which people had consented to receive marketing emails, as required by law. Between 24 July and 31 July 2019, the party sent out a total of 1,190,280 marketing emails but the ICO has found that not all emails were in breach of PECR, as it accepts it is likely that some of the emails will have been validly sent, but that it is not possible to identify what that proportion is.

The ICO concluded the party did not have the necessary valid consent for the 51 marketing emails received by the complainants. The party failed to ensure records of those who had unsubscribed from its marketing emails were properly transferred when it changed email provider.

While the ICO was still investigating, the party engaged in an industrial-scale marketing email exercise during the December 2019 General Election campaign, sending nearly 23 million emails. This generated a further 95 complaints, which are likely to have resulted from the party’s failure to address the original compliance issues identified in July 2019. The ICO had also identified these issues as part of a wider audit of the Conservative Party’s processing of personal data during summer 2019.

Mr Eckersley said:

“It’s really concerning that such large-scale processing occurred during the ICO’s ongoing investigation and before the Conservative Party had taken all the steps necessary to ensure that its processing, and database of people who would receive emails, was fully compliant with the data protection and electronic marketing regulations.”
American Express fined for sending four million unlawful e-mails

The Information Commissioner’s Office (ICO) has fined American Express Services Europe Limited (Amex) £90,000 for sending more than four million marketing e-mails to customers who did not want to receive them.

The ICO began investigating when it received complaints from Amex customers who were getting marketing e-mails, despite having opted out from them. The e-mails included details on the rewards of shopping online with Amex, getting the most out of using the card and encouraging customers to download the Amex app. Amex had rejected its customers’ complaints, saying the e-mails were servicing e-mails and not marketing.

During the investigation, the ICO found that Amex had sent over 50 million, of what it classed as, servicing e-mails to its customers. The ICO revealed that for nearly 12 months, between 1 June 2018 and 21 May 2019, 4,098,841 of those e-mails were marketing e-mails, designed to encourage customers to make purchases on their cards, which would benefit Amex financially. It was a deliberate action for financial gain by the organisation. Amex also did not review its marketing model following customer complaints.

Andy Curry, ICO Head of Investigations, said:

“This is a clear example of a company getting it wrong and now facing the reputational consequences of that error.

“The e-mails in question all clearly contained marketing material, as they sought to persuade and encourage customers to use their card to make purchases. Amex’s arguments, which included, that customers would be disadvantaged if they weren’t aware of campaigns, and that the e-mails were a requirement of its Credit Agreements with customers, were groundless.

“Our investigation was initiated from just a handful of complaints from customers, tired of being interrupted with e-mails they did not want to receive. I would encourage all companies to revisit their procedures and familiarise themselves with the differences between a service e-mail and a marketing e-mail, and ensure their e-mail communications with customers are compliant with the law.”
European Commission adopts new tools for safe exchanges of personal data

The European Commission have adopted two sets of standard contractual clauses, one for use between controllers and processors and one for the transfer of personal data to third countries. They reflect new requirements under the GDPR and take into account the Schrems II judgement of the Court of Justice, ensuring a high level of data protection for citizens. These new tools will offer more legal predictability to European businesses and help, in particular, SMEs to ensure compliance with requirements for safe data transfers, while allowing data to move freely across borders, without legal barriers.

The new standard contractual clauses take into account the joint opinion of the European Data Protection Board and the European Data Protection Supervisor, feedback from stakeholders during a broad public consultation and the opinion of Member States’ representatives.

Vice-President for Values and Transparency, Vera Jourová, said: “In Europe, we want to remain open and allow data to flow, provided that the protection flows with it. The modernised Standard Contractual Clauses will help to achieve this objective: they offer businesses a useful tool to ensure they comply with data protection laws, both for their activities within the EU and for international transfers. This is a needed solution in the interconnected digital world where transferring data takes a click or two.”

Commissioner for Justice, Didier Reynders, said: “In our modern digital world, it is important that data can be shared with the necessary protection - inside and outside the EU. With these reinforced clauses, we are giving more safety and legal certainty to companies for data transfers. After the Schrems II ruling, it was our duty and priority to come up with user-friendly tools, which companies can fully rely on. This package will significantly help companies to comply with the GDPR.”

Meanwhile in the UK, new standard contractual clauses (developed with the involvement of the ICO) are expected to go out for consultation in the summer.
IRMS Events <www.irms.org.uk/events>

7 July 2021: IRMS Twitter Hour #IRMSHour • Time: 8:00-9:00pm • Where: Twitter

To get involved with the tweet, include the hashtag #IRMSHour; our guest expert will also use this with every tweet they send. To make the Hour more engaging, be sure to follow the hashtag and interact with other people’s tweets – retweets, likes and replies are all welcomed and help to keep the spirit of the Twitter Hour alive.

September 2021: The ‘IRMS Arms’ Monthly Pub Quiz • Time: 7:00pm • Where: Online

The quiz will be made up of six rounds, covering a wide range of modern and not-so-modern topics. This month our theme will be all things superstition and luck! Expect puns, questions you’ll be able to answer, some questions that will challenge the mind, and lots of fun along the way.

Come along, have some fun, challenge the brain cells (or not, as it’s just for fun), enjoy a Thursday night tipple (not on us unfortunately), and we’ll look forward to seeing you there!

Contact Ren or Scott: <info@irms.org.uk>

4 August 2021: IRMS Twitter Hour
Time: 8:00–9:00pm
Where: Twitter

1 September 2021: IRMS Twitter Hour
Time: 8:00–9:00pm
Where: Twitter

December 2021: IRMS Pub Quiz
Time: 7:00pm
Where: Online

Training courses

Information governance training courses from LTD

The IRMS has a training partnership with Leadership Through Data, with a 10% discount for members on a wide range of information governance training courses. Leadership Through Data is an Information Governance Training and Consultancy company that uses leadership, passion and creativity to translate legislation into simplified, easily understandable language, which can be applied in every working practice. All courses are being delivered through either Microsoft Teams or Zoom, until the current pandemic restrictions are removed.

Courses and upcoming dates include:
All You Need to Know Records Management  
14/09/2021 • 06/12/2021

All You Need to Know Records Management Deep Dive  
15/09/2021 • 07/12/2021

All You Need to Know Subject Access Requests  
14/07/2021 • 19/10/2021

All You Need to Know Assessing the Impact of Privacy by Design  
07/07/2021

All You Need to Know Microsoft 365 & SharePoint Records Management  
05/07/2021–08/07/2021

All You Need to Know the role of a Data Protection Officer  
26/07/2021

All You Need to Know Caldicott Guardian  
01/07/2021

All You Need to Know Senior Information Risk Officer  
07/09/2021 • 12/10/2021 • 22/11/2021

All You Need to Know Redaction & Scrutiny  
19/07/2021 • 20/10/2021

All You Need to Know Freedom of Information  
07/07/2021 • 06/10/2021

All You Need to Know Data Protection & UK GDPR *NEW*  
14/09/2021 • 09/12/2021

Certificate in Managing Data Protection Compliance  
08/11 – 12/11/2021

All You Need to Know DPIA  
07/07/2021 • 01/11/2021

MS Teams and Information Security  
13/08/2021 • 25/08/2021 (half day)

Microsoft SharePoint Super User  
01/09–02/09/2021 (half days)  
16/11–17/11/2021 (half days)

MS 365 Sharepoint and Records Management  
05/07–08/07/2021  
13/09–16/09/2021  
06/12–09/12/2021

MS 365 Information and Privacy protection  
13/07–16/07/2021  
13/09–16/09/2021  
22/11–25/11/2021

Full details of their courses are available on the website: <www.leadershipthroughdata.co.uk>. The 10% discount is available by quoting code IRMS10 on the booking form available via the course list or the website.
Certified Data Protection Qualifications from Tkm

IRMS members can enjoy a 10% discount on three data protection qualifications provided by Tkm Consulting. All courses are approved and certified by the SQA, one of the UK’s qualification regulators, and more details about all of the courses and how to book your place are available via their website: <tkmconsulting.co.uk>.

Tkm also offer the BCS Practitioner Certificate in Data Protection in selected locations, and in-house training is also available on request; the IRMS discount applies to these options, too.

The 10% discount is available by quoting the code Tkm10IRMS, when booking direct by contacting Liz Taylor <liz@tkmconsulting.co.uk>.

BCS Practitioner Certificate in Data Protection – more info
22/09, 22/09, 28/09, 29/09/ & 05/10/2021 (10 half-day modules) Online

BCS Foundation Certificate in Data Protection
24/11–26/11/2021 (3 days) Online

BCS Foundation Certificate in Information Security Management Principles
25/10–27/10/2021 (3 days) Online

BCS Practitioner Certificate in Freedom of Information
11/01, 12/01, 18/01, 19/01, 25/02/2022 (5 days) Online

Assessing and Managing Risk for Data Protection – more info
03/12/2021 (half day) Online

Healthcare Conferences UK Courses and Events

A list of upcoming courses and events run by HCUK is available at <www.healthcareconferencesuk.co.uk/>. If you would like to attend an event and take advantage of a 20% discount, please contact the provider directly via their website and quote the code HCUK20IRMS when booking. Providing your IRMS membership number will assist, but is not essential, as members are verified with us before your booking is confirmed.

Caldicott Guardian Training Course (online)
06/07/2021 • 17/08/2021 • 07/09/2021 • 05/10/2021 • 16/11/2021 • 07/12/2021

This 1-day course provides practical Caldicott Training for both new and more experienced Caldicott Guardians, their deputies and others, involved in applying the Caldicott Principles across a wide range of organisations. It provides sound foundations for those seeking to expand their understanding of the Caldicott Guardian Role, and its function within Information Governance, and inspiration as to how it can be implemented and developed in their own organisations. The content is based on the latest national guidance including the Caldicott Guardian Manual. Christopher Fincken, Member UK Caldicott Guardian Council (Chairman 2012–2017), facilitates the course and brings over 18 years of personal experience of leading innovations in the application of the Caldicott Principles. This interesting and informative course is fully interactive; and participants in small groups will face a number of case study challenges throughout the day building personal knowledge, understanding and confidence. For further information and to book your place, visit <www.healthcareconferencesuk.co.uk/conferences-masterclasses/caldicott-guardian-training-course> or e-mail <kate@hc-uk.org.uk>. 
Masterclass: Developing your role as a Senior Information Risk Owner SIRO (online)

07/10/2021
This masterclass, facilitated by Barry Moult, a former Head of Information Governance for an NHS Trust, and his colleague Andrew Harvey, will focus on developing your role as a SIRO (Senior Information Risk Officer) in health and social care. For further information and to book your place, visit <www.healthcareconferencesuk.co.uk/conferences-masterclasses/masterclass-developing-your-role-as-a-senior-information-risk-owner-siro> or e-mail kate@hc-uk.org.uk.

Metataxis Courses

Metataxis is an information management and information architecture consultancy that provides courses on a range of information management topics. Our courses are aimed at information professionals wanting to expand their knowledge and enhance existing skill sets. Topical, accessible and informed by years of practice, each course will give you the tools to begin to introduce information governance and architecture methods to your organisation.

A discount of 10% is offered to IRMS members. For more details on course outlines, visit the Training page on the Metataxis website: <www.metataxis.com>.

If you would like to arrange some training, or for further information about our courses, please contact us on <info@metataxis.com>. Or, ask about our bespoke courses.

Metataxis also delivers bespoke training courses for our clients. This allows courses to be customised to your organisation’s needs. Bespoke courses can be delivered either in-house or at a dedicated location of your choice and can be an economic and effective way to train a group of staff. If you have something specific in mind, talk to us today: <info@metataxis.com>.

GCHQ Certified Cyber Security Awareness e-Learning Course

Templar Executive’s GCHQ certified e-learning course covers critical topics that will help users understand how to protect and safely optimise information, both online and offline, at home and in the workplace.

Topics include the threat landscape, phishing, ransomware, viruses, information assurance, and handling information.

Members get 10% discount. The code can be found here: <https://irms.org.uk/page/TemplarDiscount>.

IAPP Certified Training from Freevacy Ltd

IRMS members receive a 10% discount on any certified IAPP course from Freevacy. The discount increases to 20%, if a member signs up to receive a weekly roundup of the latest industry news. Please visit the Freevacy Training page to find out details of the training offered and how to get your member discount: <https://irms.org.uk/page/Freevacy>.

Records Management Girl information governance courses

Metataxis The IRMS is delighted to announce a new training partnership with Records Management Girl Ltd. RM Girl is well known for making the topic of records management interesting and fun and will be providing members with short and snappy webinars on direct topics under the information governance umbrella. Members will receive a 10% discount on a wide range of information governance training courses and will be able to vote on what topics they would like to see. Full details of all currently available courses online. The 10% discount is available by quoting code IRMS10 on the booking form available via the course list or the website.
new members
July 2021

Since the beginning of 2021, 247 new members have joined the IRMS. Amongst those recently joining are:

individual members
Jenny Moran
Russell Wynn
Hayley Vonder
Peter Vale
Peter Monteith
Mark Reynolds
Jesse Wilkins

affiliate members
Jessica Paterson
Cameron Thornton

student members
Marta Benito
Charity Oriche
India Mauback
Birmingham 2021
Taking place from Sunday 28th – Tuesday 30th November at the Hilton Birmingham Metropole (NEC). The theme is Information and Data – The Heart of Your Organisation, incorporating the role of Information, People, Technology and Regulation in ensuring effective business processes that meet the demands of a changing world.

Glasgow 2022
Visiting Glasgow on Sunday 15th – Tuesday 17th May, our theme is Resilience Recovery Renewal - recognising the phases of individuals’ and organisations’ response to the effects of the global pandemic, and the critical role of information and records management in enabling and supporting business continuity.

www.irmsconference.org.uk