What Makes a Records Manager?
Notes to the talk given by Nicola Franklin, Head of Information Recruitment at Sue Hill Recruitment

Slide 1 – Title slide

Intro – why this question and why am I talking to you about it?

The records management role has been changing over recent years and is likely to continue to do so –

continuing in ‘the day job’ without giving consideration to the wider world and its trends and issues is a risky strategy –

This is too likely to come back and bite you on the bum in the future, when job roles in other organisations have changed, your own organisation ‘catches up’ and restructures – redundancy can leave you high and dry with a suddenly out-dated skill set and a daunting challenge to get a new post

I hope, as a recruiter working with a wide range of organisations in both the private and public sector on all types of records management and also archives/information management, roles, that this oversight will allow me to give a broad overview of what makes a records manager at the moment, and perhaps allow me to speculate on where things might be going.

Slide 2 – Introduction

These are the areas I’m going to cover –

The future – differences from RM in the past to today to the future – what direction are we headed in?

Present day – what duties and skills are implied by the term ‘records manager’ in today’s workplace?

Future proofing – what might a records manager be expected to do in the future, and what skills will be needed to enable this? How to you go about getting them? How will they be valued? Will new qualifications be needed?

CPD – what can you do in practice?
The Future will always be different to the present – this is easy to see in hindsight – looking back 20 or even just 10 years at records management, there are huge differences –

- Barely recognised as a profession
- Seen as ‘filing clerks’ managing ‘the registry’
- No/few qualifications available, needed or expected
- Seamless transfer to/from other administrative functions the norm
- Located in basements and outbuildings… well maybe not everything has changed!

Currently –

- Masters degree in Records Management routinely called for by employers
- More on the organisational radar, as being a useful resource &/or having consequences if managed incorrectly
- RMS going from strength to strength – remember Conference even just a few years ago with barely a hundred or two attendees?
- Increasing computerisation – increasing number of IT vendors targeting the sector

An example of this was given at the RMS Local Government Group meeting on 6th February – speaker from the Learning and Skills Council – where their RM department was located within six different directorates in six years, ranging from Compliance Audit to Corporate Communications, Corporate Legal and e-Government

- these polar opposites reflect the dichotomy :
  - are records there for evidential purposes, risk management, or are they there as an organisational resource, an information repository?
  - both?
- how to reconcile the two raisons d’etre?

List of familiar drivers shown on the slide – changing technology and legislation both act to change people’s expectations – information and records should be more immediately available, both to internal users and externally for regulators or DPA / FoI requesters.

Changing expectations lead to changing funding (also dependant on general state of the economy of course).

Strength of the profession itself – changing perceptions, changing levels of confidence, increased numbers of practitioners affect perceived role and status of the industry
Slide 4 – Identifying Present Day Skills – 1

How do you know when someone in an organisation, no matter what their official job title, is a records manager? Some of the things someone in this role may be expected to do:

- Draft policy and procedures
- Document existing practice
- Produce training manuals/courses/guidelines
- Systems and business analysis
- Develop &/or implement fileplans
- Regulatory reporting
- Analysis for classification schemes
- Analysis for retention schedules
- Develop data sharing protocols
- Disaster recovery planning
- Work on FOI Act procedures
- Interpreting regulations and standards
- Advice to front-line, management and members
- Information Charters
- Integrated Bus Info Classification Scheme and Retention Schedule
- Producing Information Asset Registers – for FOI and ROPSI
- Partnership sharing and use of information
- Specification, selection, purchase, implementation of an RMS or EDRMS
- Change management

So what practical skills do today’s records managers need to have to undertake all these tasks?

- Project planning, systems & business analysis
- Project management, flexible & mobile working
- Info surveying, interviewing, feedback, analysis
- Legal and standards knowledge, interpretation
- Networking, professional development
- Media relations,
- Software evaluation,
- Purchase negotiation,
- Accessibility regulation and practice,
- Customer communication,
- Business case writing,
- Preparing or interpreting statistics
- Policy writing
- Knowledge management,
- Forming information partnerships
- Written language:- Plain English, writing content for the web / intranet
- informed understanding of the impact of records management and information compliance
- Ability to learn, absorb, understand and act appropriately on new information quickly and efficiently
• Experience of responding to specialist enquires containing confidential and sensitive personal information (= knowledge of DPA)
• Working with commercial service providers, and monitoring Service Level Agreements and procedures.
• Knowledge of professional indexing and metadata standards
• Able to apply records management theory, knowledge and best practice to projects and organisational issues within a cost-restraint environment to achieve innovative, practical and cost-effective solutions for stakeholders (my favourite!)

(Duties and Skills taken from the LSC presentation and also from RM job descriptions we have dealt with recently.)

Slide 5 – Identifying Your Skills – 2

As if these are not enough, there are also:

‘soft’ – ‘transferable’ – ‘generic’ skills

All words to describe attributes which are more a result of innate personality and aptitudes than of learnt behaviours or skills:

• balancing priorities
• meeting deadlines
• oral communication skills
• written communication skills
• communicate effectively with people at all levels
• Ability to build working relationships across professional and operational boundaries
• Ability to work effectively in a political environment
• Multi-tasking and flexible approach
• Ability to work under pressure
• Good customer service orientation
• Receptive to new learning
• Ability to interpret and apply requirements of relevant legislation / policies
• Ability to use initiative
• Ability to adopt a flexible approach to duties
• Attention to detail
• Ability to adapt to change and reconcile conflicting priorities.
• Ability to influence people at all levels
• Self motivation and goal orientation
• Enthusiasm, commitment, and determination to deliver continuous improvement through change
• An enabling, ‘can do’ problem solving approach, with an appetite for innovation
Slide 6 – Future Proofing – is it possible

Records Manager of the future:

Well clearly this is just crystal ball gazing, and things may well go in totally different or unexpected additional directions, but here are a couple of ideas of how things might be:

1. Increasingly including management of electronically-created records and emails/their attached documents
   - How many people here have responsibility for only hard copy records at the moment?
   - Needs discussion and resolution of all the attendant problems – when does an electronic document become a record? Version control? Legacy systems/retrieval in the future? Legal admissibility? Conflict over responsibility - where does it reside? Legal/Risk Management/Compliance? IT? Or should born-digital content be recognised as ‘records’ (rather than hard drive storage space, for example) and managed as such?

2. Looking a bit further ahead, perhaps - Enterprise Content Management – will RM, IM and KM merge in the future?
   - Either one system intended to manage records, information, content, knowledge and data in one repository – is this desirable or even feasible? Can differing aims (retaining one fixed, evidential, record vs achieving granularity of content for web publishing vs ‘cut and slice’ data for analysis) be achieved by one all singing all dancing ECM system?
   - Or one department responsible for the acquisition, collection, organisation, retrieval and dissemination of all of an organisation’s information/content/records = intellectual capital?

3. Alternatively – no more ‘Records Manager’ at all!
   - Saving of relevant emails in a standard structure shared drive/EDRMS, deleting of non business critical email, saving of other electronic documents, etc, all embedded in standard working practices – everyone is their own records manager

Skills for the future:

- IT skills – understanding of IT formats, interoperability, websites, information architecture, content for the web, metadata standards
- Adaptability – able to learn new concepts, skills, procedures, etc rapidly and adapt to ongoing change
- Communication – facilitation, training, promotion and marketing skills
What other skills may be necessary for these roles, which records managers may not have or need currently? Any ideas? – Delegates suggested ‘patience’ and ‘ambition’ as two additional possibilities.

Will there be a need for new qualifications?

What about ‘paraprofessional’ level qualifications – how will the new National Occupational Standards that are under consultation affect this level of qualifications? What will replace NVQs?

Will current degree/masters level qualifications need altering to meet the need for these skills? A Delegate commented that current MSc courses seem to ‘skate over’ the management / communication skills, or assume students will have gained these elsewhere – practical models such as the stakeholder management model described by an earlier speaker would have been a very helpful addition to the course they had studied, for example.

**How is records management valued?**

Last 3-4 years has certainly seen the price (in terms of salary) increase… £26,000 used to be more or less the standard salary for an experienced records manager, whereas now this is more likely to be in the range £30-36,000.

Has this been due simply to restricted supply vs increased demand due to legislation (big stick) – or has it reflected in an increase in the value placed on the records management function (carrot)?

The big stick approach alone rarely works in the longer term, however, so if RM is to be valued and the price is to be sustained, then records managers need to adopt those promotion and marketing skills, join forces with information management and knowledge management teams and make sure that senior management are clearer over the value to the organisation of having well organised records management in place.

**Slide 7 – CPD – always important**

One way to ensure that your skills develop in pace with wider changes in the industry is to ensure close attention to your CPD.

Being sent on one training course a year by your organisations isn’t it.

**Continuing** and **Development** are the key words

– this is anything that is outside of ‘just doing the day job’ – just coming in 9-5, doing your basic duties (however well) and going home again without a second thought, is a surefire way to sink a career. You may have a job, which is fine so long as THAT job, in THAT organisation exists – but where does it leave you when it suddenly doesn’t any more?

So – Raise your head above the parapet – read, attend, think
What motivates you? What would you like to be doing more of? Less of?

CPD is an ongoing process of reading a wide range of trade journals, subscribing to discussion lists, attending seminars and networking/social events, learning from peers, going on training courses, suggesting or volunteering for projects at work which will stretch your skills, attending exhibitions and conferences, etc.

Create opportunities for learning or to practice new skills – eg; if you have never had presentation skills training/experience of giving presentations – make the opportunity for yourself – when you are the only person in your department going on that CIG or BIAALL seminar, take notes and offer to report back to the rest of your team (ie, give a ‘mini presentation’) on what you learn from the event.

**Slide 8 – Summary**

‘Keeping your head down’ is unlikely to work in the long term

Know where you would like to be – or at least what direction you would like to be going in

Have an action plan – even a sketchy one in your head is better than letting events shape you (or drive you into a corner)

Take that first step.