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

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

What defines a ‘record-keeping professional’? From a student’s perspective – my own – this question appears as a perennial one: it seems to have been the theme of a spate of my recent lectures and seminars. I recall one of these ‘concluding’ that the existence and essential needs of the ‘record’ remain paramount to our work, and the ‘record-keeping professional’ ministers to its authenticity, integrity, reliability and usability needs at every stage of its corporate life. The record here, in effect, is the ‘baby in the barn’ of the ‘record-keeping professional’, swathed in rather fuzzy and fluffy but undoubtedly secure swaddling bands - and put down with maternal affection (and relief) for a long nap. Maintaining ‘the record’ at all costs seems to constitute the all-encompassing mantra for our existence. It is worth, I think, reflecting for a moment on whether by focusing so intently on the record itself, and rather taking for granted those who create and administer it, we may be in danger of throwing out our precious baby with the proverbial bathwater.

Looking back on my own foray into the field of records management (and wondering at the same time why I describe it as though it were a military offensive), I note that the work of professional records management covers not only the role of the RM team, but a host of other staff. In an environment where good records management was recognised, desired and even promoted by the powers that be, the RM team saw its endeavour as grander than a mere ‘occupational grouping’, our enterprise as greater than the sum of its parts. As do many others, we used the help of staff within office teams ‘on the ground’ to implement and embed an organisation-wide EDRMS.1 Much as the ‘paperless office’ now appears an idealistic aspiration, so too the proposed love affair between business staff and records management can seem more the result of a

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blind date – or at least some carefully-crafted relationship counselling sessions – than a match made in heaven. Coaxing staff to buy into a new way of working included spreading the mantra in person, policy document and promotional leaflet that ‘The responsibility and benefits of managing your records are YOURS’.

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

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

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

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article are, I believe, helpfully extrapolated beyond the Malaysian experience and provide a necessary critique of how we do things in the UK.

As in the large majority of Malaysian businesses, a significant proportion of large public and private organisations in the UK who do not employ qualified records managers are, nevertheless, interested in managing their ‘corporate information’ and ‘data assets’ in some fashion, whether their primary function be delivering a public service, conducting research, developing bespoke solutions for clients, distributing humanitarian aid, or pursuing a profit. In the above category of large companies, it is likely that

the role and functions of records management lie with either the administrators for paper-based records or the information technology (IT) personnel for electronic records. The administrator could either be an accountant, auditor, or legal advisor by qualification, and the IT personnel are mostly from a computer science and IT education background.3

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

In view of this, I find it surprising that, in organisational contexts where a professional RM function has a healthy and well-established profile, the creation and fostering of a group of employees as RM-skilled end-users is pursued by the records management team in a disturbingly similar way to that in which businesses where RM has a low or non-existent profile hire employees who can also perform basic records management tasks in addition to their primary role. In either case, the benefits from any kind of records management risk being watered-down by an un-incentivised, disinterested and potentially unskilled workforce. And, in the former case, if those who are made the ‘go-to’ individuals with regard to immediate records management queries lack confidence, interest or an incentive to learn, such queries inevitably rebound on the busy records management team; issues take longer to rectify; work progress is hindered, and staff belief in the practical benefits of records management risks being shaken or quashed altogether. Creating unofficial support staff in this way can further

3 Ismail and Jamaludin, 'Records professionals', p. 73.
imply that the RM function is already well-embedded in an organisation and that records management teams are seen as resting on their laurels. Gaining records officers should at the very least signal the start of a dynamic business-as-usual strategy, rather than a sign of RM having already achieved sufficient prominence and success. Overall, there is a danger of the idea being perpetuated that records management is not a core business function.

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

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

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

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

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

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

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4 Yvonne Platt, personal conversation, 1 March 2015.
Non-professional support staff trained by professional RM staff to promulgate good practice and be the first line of enquiry and defence against an otherwise endless stream of user queries and EDRMS issues. Like the skilled specialist above, this category of records management practitioners receive their records management tasks on top of their everyday role.

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

And more could be done, I feel: perhaps something as simple as a reconsideration of role titles would help us distinguish those staff who want to promote RM from those staff who are simply enlisted to help – a substantial distinction between the records ‘champion’ and the record ‘officer’-type roles? Or perhaps a change in how these roles are filled? Rather than an autocratic and fairly blind nomination by managers, a means of specifically eliciting support staff buy-in to RM would be advantageous. Another idea is to develop motivational incentives such as workforce groups and social events – a little like what records managers experience with membership of a professional association – or quid pro quo arrangements for taking on the additional role, such as time off in lieu. For those who take up such roles in a business context, such things might well improve the experience and effectiveness of records management support staff, contributing to the integrity of the whole records management programme.

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