



Annual Report & Accounts 2019/20

Welcome to the Annual Report of the Information and Records Management Society (IRMS)

The Annual Report outlines the activity of the Society for the 12-month period to December 2019. It also includes the Society's Annual Accounts for the calendar year of 2019.

The report is made up of an overview of our activities, given by me, then individual reports from each Director, Officer and Group Chair. This year is slightly different, as this is my last report as Chair of the Society; therefore, I shall be exploring the work achieved over the last 4 years. Please take the time to read through all the reports, as they are a key reflection on how the Society has performed for the year and how your membership fees go a long way to fund all the different things the IRMS offers.

The IRMS would not be where it is today without the unwavering support of our volunteers and third parties. I can only pass on my most heartfelt thanks for all that our volunteers do, as they do all this and have a day job. As always, each and every volunteer never ceases to amaze me with their generosity of time, kindness and talent. I have enjoyed working with all of them and will miss them greatly.

I hope you enjoy reading and thank you for continuing to be a member of the foremost professional membership organisation for all those engaged in the management of information.

All the best,



Scott Sammons FIIM, AMIRMS, NLP.Cert
IRMS Chair

2019 was, by all accounts, another busy year for the Society. With a few new team members coming on board, and the loss of so much knowledge, with Fiona, Emily etc, the team can definitely say it was an interesting year. Reyn has taken to the role of Vice-Chair with renewed vigour, and his work over the last year to ensure the GDPR project is delivered, update our standard contract template to ensure it's fit for purpose in a changing environment, and support the roll out of the Academies toolkit have all been greatly appreciated. Joe Chapman is settling into the role of Conference Director very well, and we have yet another action-packed and exciting Conference agenda for you (read his report for more on that!). And, finally, David Reeve has settled in brilliantly to being the Chair's right hand/herder/taskmaster/godsend (or all of the above).

I say this each and every year, and each year I surprise myself on how I can mean it, even more than I thought possible every year, but the amount of work, dedication and companionship each and every member of the team gives, for something that offers very little in terms of reward, is something I treasure and something they should be proud of. If you haven't thought of getting involved before, please do! I've made some lifelong connections with some of my fellow volunteers and I shall very much miss working with them all.

Now, usually the Chair reflects on the work for the year and gives you snippets of what everyone else has done, but, as this shall be my last, I want to give you snippets of what the entire team (past and present) has achieved since I became Chair 4 years ago. I shall finish as I started, and that is with an emphasis on the team and how the Chair is nothing without a strong team. A Chair is nothing more than a motivator, a herder and a force to be used when one is needed. They do not seek to control, but instead empower those around them to succeed and get the most out of their skills and work. I was not the perfect Chair, not by a long way, but I hope that, in a small way at least, I have led a team over the last 4 years that has made a real difference to the Society, the profession and our members. I challenge future Chairs to do better than their predecessors and lead the Society to bigger and brighter heights.



Over the last 4 years, the Society has focused its work through a series of workstreams to ensure they work coherently and efficiently. While these have evolved over time, they mainly fall into Member Development, Commercial Development or Content Development, as the three core areas of the Society which each benefit or service we perform tends to fit into. I want to start by summarising our challenges over the last 4 years and then move on to what we have managed to get done in spite of them.

Firstly, finances are always a challenge for any organisation. After investment in the website in 2016, the accounts each year ran a deficit. Through our work to streamline, modernise and cost save where we can, this required some longer term investments and actions that wouldn't see fruition in the books until the following financial year. It has been challenging, with difficult discussions to be had, days of work to review and work with our partners (old and new) to ensure we are being as efficient as possible and ensuring a fair, transparent and robust tendering process for services we provide. We didn't achieve the surplus we wanted for 2019 unfortunately. As

David explains this is due to a number of factors and something that we have been keeping a close eye on. With the effects of the increased fee and changes to how we run conference starting to take hold for 2020 we are hopeful that this will turn around for 2020, especially as we have had a reasonably healthy 2020 so far (COVID19 dependant). The members' faith, support and David Bowen's work in this regard is very much appreciated and has kept the good ship IRMS on the right financial path. While we have a way to go before all financial concerns are gone, the team is well placed and supported to get this done and move the Society forward.

Another big challenge we face is the fact we are all volunteers. We have a stance that, in your life as a volunteer, health comes first, followed by work and family commitments, with IRMS coming after all of them. This has worked well in setting expectations and reminding our volunteers, if they are becoming overstretched across all areas in their life, to take a time out and our other volunteers will help out. It does mean, however, that, while we have all been

busy with GDPR in our day jobs, it has put a strain on the Society and our ambitious work plans.

Our method of working, sharing of workload and our established (and self-enforced) team rules meant that we were still able to deliver on the key areas and reach out when we were struggling. While this model can always grow and evolve with each team that comes, I hope this is something that stays with the Society for future generations.

Over the last decade or so, the IRMS has weathered the recession, austerity, Brexit etc relatively well. While things have spiked and dipped, on the whole, the IRMS has been able to press forward and not have to rely on the membership for price increases. So, while we had to increase the fee for the first time in a few years last year, this has meant that we shouldn't need to again for a while and it gives the Society time to diversify its income streams.

COVID-19 is the latest in those challenges to the Society and Conference and, at the time of writing this (15th March 2020), we again look set to handle whatever

is thrown at us, and for that I thank the Conference team and Revolution Events.

Despite what challenges stand in our way, the team has risen to them and surpassed them, as best we can. From May 2016 through to May 2020, I am very proud of the team for delivering the below shopping list of deliverables. For each one, I have outlined what it is and called out someone in particular who helped deliver it, but everyone involved is a star and a credit to the organisation.

- Completion of the website implementation project, including working on membership data quality and revised membership administration processes by Neil Reeves, Fiona Kearney and David Bowen. This now means members can manage more of their membership than ever before, access more resources and knowledge than ever before, and gain access to more information on how the Society works than ever before

Despite what challenges stand in our way, the team has risen to them and surpassed them

- Establishment of an IRMS training discount portfolio, covering the RM basics through to cybersecurity essential skills by Emily Overton and Sarah Norman
- Delivery of the revised Schools & Academies Toolkits, as well as the Third Sector Toolkit by Elizabeth Barber and her team, Gary Shipsey at Protecture and Reynold Leming
- Securing extra member discounts or access to events like NADPO, DP Forum, Cyber Security Summit & DP World Forum by Emily Overton, Joe Chapman and Laura Stockwell
- Harmonisation of the policies, procedures and governance standards of the IRMS, including embedding the recommendations of the Governance Sub-Committee to ensure the Society remains transparent and accountable at all levels by me, Fiona Kearney, David Bowen and the fantastic team at Kingston Smith
- Establishment of standard guidance, processes and resources for Group Chairs by Jaana Pinnick, Suzy Taylor and Melody Allsebrook (with the Group Chairs) so that we can put on more events than ever before and appeal to a wider audience
- Agreement on and deployment of a marketing and comms strategy by Joe Chapman, Laura Stockwell and Jessica Waite, to ensure that we have both the knowledge and skills to manage comms channels, but also that we have a professional, joined-up approach to internal and external comms
- Implementation of GDPR within the Society, which includes finally getting the IRMS's information and records practices updated and agreed for the 21st century – we now have a file plan, retention schedule and are about to agree on an official archive, all thanks to Reynold Leming and his GDPR team
- Development of the Diversity and Inclusion strategy to look to ensure the Society is fit and accommodating to all we represent in the profession, and to look to understand more about diversity and inclusion in the profession thanks to Katherine Stevenson
- Widening our representation on various standards committees across the UK and wider thanks to the work done by Roger Poole and Heather Jack

- Further development and enhancement of the Accreditation programme, including establishment within Central Government thanks to the Accreditation Subcommittee led by Rachel Maguire and her team
- Development of the IRMS Awards programme by me and the Awards Panel, including our new volunteers that came on board in late 2019

I cannot put everything in this list (I did, then had to gut a lot of it for the word count), so, trust me, a lot more was delivered over the last 4 years. My mother taught me to leave something in a better condition than I found it, and, with the team's support, counsel and commitment over the last 4 years, I am hopeful that this is the case.

Ultimately, you, the members, are the judge. You've stuck with us on our journey, supported the various initiatives and consultations, and fundamentally helped us grow our membership number and appeal, and our appeal and standing with vendors, regulators and the Government. Long may this continue and I wish all the very best to Reyn and his team for 2020 and beyond. I took my chairship very much to my heart, as this is my way of paying the profession back for its faith and trust in me, when I started my journey as a New Professional Award winner.

Trust me when I say, if a little guy like me can be Chair and not balls it up, then anyone can. I challenge you, reader, to think about how you can help the Society grow and even how you can contribute to the Society as anything, but particularly as Chair. Do it, I dare you.

That leaves me to say thank you to everyone that has been so kind and supportive over the last 4 years and indeed over the last year since I announced my stepping down. I've enjoyed every moment, the ups and the downs, and want to express from the bottom of my gin-soaked heart my thanks and appreciation to our partners at Kingston Smith, Revolution Events, Tribal and Visual Print; our various training partners (far too many to mention here); all of our volunteers; and most of all you, our members. I wish you well and I'm sure my awful jokes you thought you had escaped in From the Chair will work their way back in for your reading pleasure in the Bulletin at some point.

Live long and prosper



The IRMS year commenced with me still in place as Conference Director, handing over to Joe Chapman at the AGM.

I thoroughly enjoyed leading the development of "IRMS19: Information Governance – the quest for truth and trust", held at the Celtic Manor Resort in Wales. This theme reflected that, with both the GDPR and Data Protection Act 2018 now live, trust in how personal data is handled is even more important. At the same time, information and records managers have long sought to be the keepers of informational and evidential truth for organisations. There was a high attendance of both delegates and vendors, and I hope that everyone had a rewarding experience.

We were delighted to have keynote speakers from Gartner, The National Archives, the Welsh Government, Castlebridge Associates and the University of Bath leading a bumper programme of over 50 sessions of excellent content, covering Law and Regulation, RM Nuts and Bolts, Soft Skills and Technology & Innovation. There was also the sponsored Deployment of Solutions stream, a great sponsor exhibition area, and the very well received and funny set of "elevator pitches" from vendors.

There was a wonderful medieval theme for the gala dinner and awards ceremony, which has left me with great memories of another wonderful Conference evening.

My role has involved working closely with Revolution Events on the planning, logistics and marketing of the Conference. I have

been supported by an excellent team from within the IRMS Executive and enjoyed liaising with a number of vendors who are key sponsors and exhibitors. A very big thank you from me to everyone who really help enable this great event to happen!

I wish Joe and the team every success with this year's conference "Information and Data – the heart of your organisation" in Birmingham.

At the 2019 AGM, I had the honour of

becoming the Vice Chair of the Society. I have over the last year enjoyed helping colleagues on the Executive Team progress an exciting work plan.

My role has involved working closely with Revolution Events on the planning, logistics and marketing of the Conference.

One area of work I have been involved with is a refresh of the Society's own information governance policies and procedures. This ensures that we continue to implement best practice in the areas of information security, data protection and records management across our member, event and corporate information and data.

I have also been involved with the creation of a new standard set of contract terms to be utilised by the Society when working with third parties.



I have worked with the digital team on revisiting the IRMS Retention Wiki, which will be re-launched for the 2020 Conference. This has been placed on a new platform that should make contribution easier and will also include articles on information governance matters, as well as retention content. I have liaised closely with the editorial team to bring the new Academies Toolkit to publication and give a huge thanks to the efforts of all volunteers involved in that process and, in particular, my gratitude for the enormous efforts of Elizabeth Barber and Suzy Taylor.

I am currently working with CC2i, the public sector co-funding and collaboration platform, on the very exciting Greater Manchester Combined Authority (GMCA) project to bring together a collaboration of public sector bodies to co-design and develop a digital Data Protection Impact Assessment (DPIA) platform. I want the Society to be closely involved with this and to see how benefits can emerge for our members.

At the 2020 Annual General Meeting, it will be my absolute honour to accept the role of Chair of the Society. I wish firstly to thank Scott, with whom I have worked closely for many years, for his enormous efforts and service to the Society.

In addition to the business as usual activities of Society administration and the provision of member service, I have a number of specific areas of focus. Firstly, we will be progressing work already on increased inclusivity and diversity within the Society and the wider profession. I wish to continue the expansion of high-quality member benefits and resources. One area of interest is to look at the provision of further sector-specific Toolkits.

I would also like to specifically collaborate with leading industry organisations, including other membership societies, within the sector to look at how privacy, data protection and information management can be included on the schools' curriculum.

Another area to mention is that I will be looking at engaging the vendor community around the creation of a comprehensive supplier directory, so that we can learn of their latest offerings and achievements, as well as know who to speak to about different products and services.

To quote an expression, "my door is always open" and I look forward to engaging with as many people as possible about what the Society can offer to members and the wider industry and community.

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Secretary

Dr David Reeve



This is my first report as Secretary of the Society and it has certainly been a rollercoaster of a year learning my new role! The biggest challenge for me has been balancing this role with my very busy day job at Jisc (who have been really supportive in taking on the secretary role). So, a huge thanks to the rest of the Exec, KSAM and Rev for all the support and encouragement that you have given me over the year.

I am grateful to my fellow Executive Team members who, though volunteers, always respond to my secretarial demands relating to the organisation of meetings and annual reports and general administration that I ask of them. I have been impressed with their dedication and commitment to the IRMS and I thank them for their hard work throughout the year. I would like to say a special word of thanks to Scott Sammons for his tireless work as Chair over the last few years and for supporting me in my first year. Scott, you will be greatly missed.

KSAM continues to provide us with enhanced administrative services, including meeting administration and organising our face to face meetings and St Albans. The service has continued to improve our processes, allowing us to focus on our strategic and project work we are undertaking. It has certainly made my role easier. We have had face to face meetings in London, Manchester and St Albans with our final face to face in Birmingham, the day before the conference. A key role of Secretary is making sure that the Exec has bed and board during these meetings and KSAM have been great in supporting me.

We have been delivering an exciting work plan during the year. My focus has been on supporting work towards the implementation of Office 365 and decommissioning of G-suite because of the extensive work I do

with the product at Jisc. It will be great to have a simplified file plan that is easy to understand and use. Teams is a great product for collaborative working and also for conference calling. However, this has had to be put on hold, while we look to move to charity status. We will pick up this work for next year. I have also been supporting and advising COG with the proposed move to charity status.

I will be creating an IRMS IG Framework to demonstrate how the IRMS manages its own information, data and records. This is ongoing at present, as we update and add to our policy library. When we are ready, we will build this into Office 365.

Scott, Jaana and I have also begun to deploy knowledge management documentation, capturing the roles of the various constitutional officers and Exec member roles and responsibilities. The idea is that there will be an easy knowledge management library that makes it much easier for new committee members to understand their roles and responsibilities and the policies and strategies we have in place. This will come into its own once we can move to Microsoft Teams as an easy means to collaborate on this work. So, watch this space, as we move into the new year.

I have also been giving advice and feedback on a number of the policies, strategy and framework activities that are being developed by the Exec and identified in the work plan.

The role of Secretary can be challenging, at times, but it is also very enjoyable, and I look forward to continuing the role next year with a new Chair and Vice-Chair. I am also looking forward to the chance of meeting many of you at the conference in Birmingham.

Treasurer

I am writing this at a time of great uncertainty and anxiety. I am self-isolating, and the future of our AGM and Conference is very unclear. One thing that is clear, throughout the year, is the gratitude we all owe to the members of the Executive Committee of the IRMS. These committed volunteers give time, energy and imagination to run the IRMS for you, the members. I would like also to thank the staff at Kingston Smith Association Management (KSAM, our administration partners) and Revolution Events (Rev, our Conference partners). Partners like KSAM and Rev make our jobs as volunteers feasible. I encourage all IRMS members to consider volunteering for the Executive, or for a Group; it is fun, a good way to learn, and keeps the Society working smoothly!

I am happy to answer questions from members, either at the AGM, or via the IRMS website
<www.irms.org.uk>
or e-mail
<treasurer@irms.org.uk>

I will first consider the Income and Expenditure Account: Our income in 2019 was almost £14,000 less than the income in 2018, although it was more than £28,000 above the 2018 income. The reduction between 2018 and 2019 was partly reduced income from subscriptions and partly reduced sponsorship income. Sponsorship at Conference and for Group meetings is important to the Society. We depend on our sponsors, both as individuals who use their services, software and equipment, and as a Society. I hope all of you will

visit their stands at Conference, talk to them at Conference and Group Meetings, and discuss your purchasing needs with them.

In order to support our income for 2020 and subsequent

years, we increased the membership fee in 2019. The increased fees are taking effect for subscriptions renewed or taken out in 2020, and should show an improvement in our 2020 income.

Please note that the Conference items are misleading. This is because not all Conference income, and not all Conference expenditure, goes through the IRMS accounts; some is handled by Rev on our behalf. This situation will be fixed from the



2020 accounts forward; we are putting all Conference money through accounts at Rev, who provide regular financial updates to the Executive Committee. For information, the IRMS surplus share from Conference was: 2017: £47,993.31; 2018: £32,436.15; 2019: £36,182.45.

Our total expenditure is higher than 2018 (by £9,450) and 2017 (by £28,790). We have reduced Administration, Bulletin and Groups costs. Gifts looks high, but this is because Awards were included in Gifts for 2019, but in Conference for 2018. Officer's expenses look very low, but this is because most expenses have been recorded as Travel and Subsistence. The total (2019: £16,033) is less than the total for 2018 (£17,295). Bank charges are slightly increased; and are probably too high – they are not charges for our account, but for our facilities to accept credit cards and direct debits. We will review these during 2020. We have also had to include £1,782 for bad debts (mainly ads in the Bulletin which have not been paid for).

Finally, I wish to mention the Balance Sheet and, specifically, the Deferred Income (2019: £56,871; 2018: £29,974). This is income received in 2019, but assigned to 2020 (mainly subscriptions paid before 31 December 2019). While this contributes to our deficit, it shows that we are fundamentally healthy financially. We will get significant deferred income every year.

The result of everything above is a loss in 2019 of £5,729. We will work to reverse this for 2020; it is not ideal for the Society. It means that our General Fund has reduced to £44,697. I hope we can increase the General Fund closer to £80,000 or £90,000. This is because we have a risk with Conference: it is conceivable that we could hold Conference, but lose £50,000 or more. Finally, there are initiatives that the Society should be prepared to invest in, and we need a healthy General Fund to allow us to invest confidently.

Finally, I am happy to answer questions from members, either at the AGM, or via the IRMS website <www.irms.org.uk> or e-mail <treasurer@irms.org.uk>.



I am new to this role, having been appointed at the AGM in May 2019. Therefore, I have spent the past few months getting to understand the role and the team. I was lucky in that Ed Irving had already started in the Commercial Officer role and was running with the Bulletin.

A formal handover of tasks and responsibilities was carried out during the summer in London and I thank Roger for leading this session and providing guidance as to the expectations in the role. My main input this year has been limited to a few tasks, but I hope to make a bigger impact with various initiatives during the coming year.

Supplier Contract

The first major contribution has been to bring my experience to play to support Reynold Leming in the production of a revised set of contractual terms and conditions that will be used to ensure standardisation across the various suppliers used by the Society.

Having standard and clear T&Cs provides us with a common approach to managing the performance of our suppliers and reduces the admin overheads for the Exec. This was a challenging task, as we needed to cater for both product and services suppliers.

IRMS Bulletin

Ed has taken up the day to day coordination between the editorial team at Tribal; advertising sales made by Revolution; and the newly appointed production, design and distribution provider – Visual Print. As always, changing suppliers carries risks and this was evident in that we had some initial teething troubles with design and addition of inserts,

as well as delivery to our members.

I would like to thank Scott, who intervened and made the supplier's senior people aware, so that the issues could be investigated and resolved. As always, we welcome feedback from the membership on any delays in receiving their copy of the Bulletin or ideas for content.

The Society is responsible for the distribution list, so please ensure your details are correct – these can be updated in your profile within the members area of the website. Members can also select their preferred delivery mechanism.

Exec Meetings/Calls

I have attended all quarterly face to face Exec meetings and most monthly calls and contributed as and when called on. I am currently looking at how we can encourage more corporate members to the Society and will be reviewing the benefits that such membership brings to both the corporation member and their staff.

We are also looking at how we can attract a greater variety of sponsors to help fund the various group events that are run across the country. Coupled with this is consideration of what benefits we may gain by creating a records and information management supplier directory.

Exhibitions

I have attended a couple of conferences where IRMS has been exhibiting to promote the society and attract new members. We are looking at how we measure the success attending various events and will be reviewing various ideas through the coming year, including use of promotion codes that are linked to a particular event.

Commercial Officer

Ed Irving



This is my first report, as I'm new to the role, having started in January 2019.

Much of this year has been about getting to know the team, as well as in understanding the role.

I am responsible for management of the production of the Bulletin, the Society's thought-provoking leadership magazine, a key membership benefit. I also have a broader responsibility to increase the Society's membership base into the private sector.

A formal handover of tasks and responsibilities around the Bulletin was carried out during the spring with Emily Overton, the former Vice-Chair, who had previously had responsibility for this.

I represented the Society at the Annual BEIS KIM Conference in June and presented the benefits of IRMS Membership and, in particular, Accreditation. This was well received, with an acute interest in our future plans for Accreditation.

My main activities outside of this have been focused on the production of the Bulletin, ensuring good communication and workflow between our partners, as well as in preparing to re-tender the editorial services contract.

The Bulletin has recently transitioned to a new design and production partner, Visual Print, and, as ever with any change in supplier, we have had some challenges around this. Both Tribal, the Bulletin's existing editorial partner, and Scott, the Chair, have supported excellently during this time.

I am looking forward to the re-tender exercise, as it provides a great opportunity to look at creating additional value for the Society and its membership.

I have had some good support from Simon Ellis, the new Commercial Director and am keen to support in a broader commercial role throughout 2020.

Conference Director

Joe Chapman



Like the proverbial stick of (Brighton) rock, the IRMS Conference has been a constant thread through my work on the Executive Team, since I joined it in 2015. So, I was delighted to be asked to take on the role of Conference Director after last year's fantastic show at Celtic Manor.

The conference has gone from strength to strength in the time that my predecessor, Reynold Leming, was at the helm, and he sure is a hard act to follow – never more so than in his ‘father-and-son’ double act with our outgoing Chair at the Gala Dinner! This year's Monday night will have a slightly different feel, but will retain all of the elements the delegates know and enjoy.

And that goes for IRMS20 as a whole – in planning it, I and the conference team have focused on building on success, while also trying a few different things that reflect what I'd like to see at the IRMS Conference, what's worked well elsewhere and, most importantly, what I've heard and read in the very valuable feedback we get from delegates and sponsors alike.

For example, we're adding panel sessions to the main programme this year, introducing an opportunity to ‘meet the speakers’ and the IRMS Groups on the Monday afternoon, and mixing up some of the session lengths to encourage some really interactive sessions and others that can dig a bit deeper into a subject area.

The opportunity to meet and share experiences with fellow information professionals is a hugely important part of what the Conference and the Society are about, so I'm looking forward to seeing

how those sessions go and learning how we can develop them in the years to come.

Another aspect of the programme that is particularly important to me is equality – at the time of writing, we're on course for an almost exactly 50/50 gender split in our keynotes and in the rest of the speaker line-up too. But, of course, we can always do more, and achieving greater overall diversity will continue to be a focus for the Society and our showpiece event.

We're likely also to have a mix of old and new faces in the Information Market this year. We're extremely grateful to all of our sponsors and exhibitors, without whose support the conference just could not happen, and it is a great compliment to the event that it attracts not only repeat bookings, but other vendors who recognise the value that spending a few days at the IRMS Conference offers to them.

Of course, the conference is so much more than just those few days – it was a little over 6 weeks after we left south Wales that I was meeting up with Deborah, Eli and Emma from Revolution Events (Rev) at our brand new (to us) venue in Birmingham, planning and visualising the 2020 version.

It's been a real pleasure working with the brilliant team at Rev, who do so much work throughout the year to make everything run smoothly; really, we just put our name on it! A few weeks after that initial meet-up, I and others on the team were looking even further into the future. That's because we're breaking our recent habit of returning to Brighton every couple of years, and taking the IRMS Conference on tour around the country – to Glasgow and Manchester in the next couple of years. No more sticks of rock then...

Conference Officer

Andrew Harvey



The role of Conference Officer was created in 2019 shortly before the conference, so this year has been my first year 'full time' in the role.

Balancing a busy work and family life with such a voluntary role can be tough, but is equally rewarding. The role, as I have interpreted it privately (not so privately now), is as a 'critical friend', sense checking some of the status quo things we do, plus any new decisions in as non-confrontational and constructive a way as possible.

I have also embraced my network of contacts from my professional life, working in the health and social care Information Governance sector, to source three of our keynote speakers for this year's conference. These are Dawn Monaghan from NHSX, along with Phillipa Nazari and Jovian Smalley from the Greater Manchester Combined Authority. Dawn is speaking on 'Information Governance in a Changing Health and Social Care Service' while Phillipa and Jovian are delivering the closing plenary.

I, for one, can't wait to hear them speak.

Having got to grips with the role, I look forward in the next 12 months to being even more involved in planning for our 2021 conference.

Digital & Training Officer

Penny Wright

I joined the IRMS Executive as Digital and Training Officer recently, in October 2019, and I'm writing this at the beginning of February, so this will be a relatively concise report!

My history with IRMS is slightly longer, however, having joined as a student in 2017 and been a member since then. My role is to work with and support the Digital and Training Directors. This has meant learning how to use the Content Management System to update content on the IRMS website, helping to source and organise new training, updating training event information from our existing training partners, helping to think of ideas for podcasts and generally getting involved with whatever is needed.

Much of the work in the role is done remotely, but I attended my first Executive meeting in February, where I received a warm welcome and got to meet everyone in person, in particular, Neil and Sarah, Digital and Training Directors, respectively.

I'll be attending the Conference in Birmingham in November and am looking forward to throwing myself into all of the social events and helping out wherever needed. I've attended the last three conferences as a delegate and always had fun, while learning from some seriously interesting people during sessions. No doubt this Conference, and the year ahead, will be a busy (but enjoyable) one!



It is with a tear in my eye and a heavy heart that I write my last (for now) report for the IRMS. It has been a fantastic 5 years working with some incredible people, but it feels time to take a step back and concentrate on other ventures. I'm not ruling out the possibility of coming back at some point though, so watch this space!

It's been an interesting year. Last year, I hoped I would manage to get a Group Chairs page created, and I have managed to succeed, although some of the Group Chairs are more camera shy than others! I had also hoped to get the LGCRS hosted on our website, but I'm afraid to report that no progress has been made on this. As far as I am aware, it is still hosted on its old site and we are still waiting for a HTML file to test to see if we can incorporate it into our site. I do know, however, that our very own Michele Noad (Group Chair of SPOG) has been working on a whole new scheme, so I'm sure there will be an update on this in her report.

Scott, Chair of the Society, roped me into a project to move us away from using Google (which can prove problematic for some people to access) and onto Microsoft Office 365. Scott did all of the negotiating and all I had to do was be on hand for the big switch over... but alas we were foiled by a bit of red tape, so I imagine this will be a project my successor will bring to fruition.

We advertised for and successfully recruited a Digital and Training Officer (welcome Penny!) and she will spread herself between the Digital and Training Directors. Already,

she has taken on some regular web-updating tasks. Speaking of regular updating tasks, we have seen (thanks to Training Director Sarah) a massive increase in the amount of training IRMS members can access at a discount. If you haven't visited recently, please visit the Training Discounts page <www.rms.org.uk/page/Training>

Thanks to some sterling work done by our long-term partner, Emily, from Webfooted Designs, I am pleased to be able to report that the Wiki is ready and on an easy to use WordPress site. You will be able to register and start accessing materials and also be able to contribute to what is already there. You, our members, also considered the IRMS Wiki to be a useful tool, which is why we have taken the time to update it and make it easier to use.

Looking ahead, the projects I (as a member) would like to see are the move to Office 365 and a tidy up of the website. Laura and I (Marketing Director) had a visit with a consultant, who offered a review of our site, as they were very familiar with YourMembership, who run our site, and we got some great hints from him on how we can make some small changes to make the site a little easier to navigate. I'm hoping my successor and Penny can put this into action.

So, that's it folks, thank you for the fun times. I'm looking forward to partying one last time with you at Conference. I'm sure I will return one day! :)

Groups Director

Jaana Pinnick



In May 2019, Melody Allsebrook stepped down as the Groups and Volunteer Officer and Suzy Taylor took on the role. Suzy has done a sterling job with supporting me, the Groups, the volunteers and running the North Group to boot! She must have enjoyed doing it, as she will become the Groups Director as I move on to the Vice-Chair role. Musical chairs you could say! We will be looking for a new Groups Officer, so perhaps it is time for you to step in this year? (Yes, you!)

We have lost David Paris (Scotland), Bilal Ghafoor (London) and Patrycja Duszynska (Wales), who stepped down as Chairs – many thanks from all of us for the time and effort you so generously gave to the IRMS! On the bright side, Maria Lim has stepped in in Scotland, Emily Overton in London and Emily Gresham in the Midlands. I also believe some of them have brought in new team members, so welcome on board everyone. We are always looking for new members to get involved in the running of the groups – so whether you can spare hours or days, I promise we will welcome you with open arms!

We published the first edition of the IRMS Group Chairs' Handbook in May 2019, to provide the chairs a how-to manual, and Suzy and I have been working on the second edition to keep things up to date. We have also, with some help from the Membership and Commercial Services Directors, developed a Groups' Strategy to accompany the handbook and to ensure we work in line with the Executive strategy.

Over the year, the Group Chairs organised a total of 18 events (Ireland 3, one of which

was a joint training seminar with ARA Ireland; Isle of Man 1; London 3; Midlands 1; North 3, one of which was a joint event with SPOG; Public Sector 3; South West 3; and Third Sector 1). These events took place across 16 different venues across the UK and Ireland, some of which were hosted by our members, sponsors and partners – for which, many thanks! The events involved 43 speaking slots, 7 sponsorships, and an eye-watering 533 delegates! That is quite a number of people to organise, so I would like to give big thanks and applause to the Group Chairs and their teams who made it happen.

We have liaised with members to create a sparkling not-to-be-missed programme for 2020, and it is being implemented as we speak. There are 18 new events already listed in the Groups' calendar at the time of writing this in February, so please check your own calendar for the remainder of the year and get the dates in.

Some groups have been dormant in 2019 due to a lack of membership interest and support. We will be reviewing the need to maintain these groups as part of the group strategy implementation over 2020, and we will also be looking for new Group Chairs and other volunteers to activate groups that members want to hold on to. If you would like to get involved with, eg, the Wales group, please get in touch with <groups@irms.org.uk>. In addition, a decision was made in agreement with the Group Chair to close down the Independent Consultants Group in November 2019.

Finally, we offer members the opportunity to attend accreditation interviews during our events. If you are interested in this, please contact the accreditation team and the relevant Group Chair in good time. You might be an AMIRMS by the end of the year!

Groups Officer

Suzy Taylor



I started in the IRMS Groups Officer role in the middle of 2019, and I have had a great time supporting the Group Chairs and Groups Director, Jaana Pinnick. I've organised our regular conference calls and done a lot of behind the scenes admin, ensuring our lists of sponsors, venues and events are up to date.

I've also updated our list of volunteers, who have all offered to give up their time to IRMS initiatives and to help Group Chairs organise events. This list is available to Directors when planning projects and initiatives.

I've been working with Jaana on updating the Group Chairs Handbook and on a Groups' Strategy that has now been presented to the Executive Team.

One of the cornerstones of the strategy is that IRMS should recognise that Groups are the primary connection to the IRMS membership. We know that not everyone can make it to all their regional or special interest group events, and we need to look into other ways of allowing members to participate in discussions and be part of the community.

Where we can, we want to ensure that every member who wants to be part of a group – especially those who are happy to organise events, online or in real life – has somewhere to go.

I'd be very interested in hearing from any member who feels they'd like to have a go at helping a Group Chair to organise an event, either informally or by becoming a Group Treasurer, Secretary or Vice-Chair. Volunteers are the lifeblood of IRMS, and it's a great way to get experience and make new contacts within the society and the profession at large. Contact me at <groups-officer@irms.org.uk> if you're interested.

Communication Officer

Jessica Waite



It's been almost 3 years, since starting my role of Communications Officer back in August 2017, and so much has happened since then: IRMS has expanded so much and we now offer more resources and more ways for our members to get involved with the society.

The website <www.irms.org.uk> still remains the central place for member resources and interactions; however, my focus has been on the Facebook page <facebook.com/irmsociety> LinkedIn group <linkedin.com/groups/1814724> company page and the Twitter feed <twitter.com/irmsociety>. We now hold a monthly Twitter hour, every first Wednesday of the month, 8–9pm UK time. Some of the topics already discussed are Digital Preservation, GDPR Article 30, New Professionals, and Information Audits, many more will continue into 2020 and beyond. If you don't already, please do connect with us on these platforms.

I also continue to send our monthly newsletter "Off the Record" and contribute to the glossy published Bulletin; the archived versions are available on our website <www.irms.org.uk/page/Bulletin>

The next big task for the Communications Officer is at the IRMS annual Conference 29 November - 1 December, in Birmingham, ensuring those at the Conference know the agenda and activities during their time and those that unfortunately can't make it can still keep up to date. Search #IRMS20 on Twitter for all the updates or download the app from your app store. The topic is "Information and Data – the heart of your organisation". The conference is a great opportunity to hear from inspirational people, network with like-minded peers and speak to vendors from the IRM industry.

Marketing Director

Laura Stockwell



I took on the role of Marketing Director in May and have thoroughly enjoyed being involved with the Society. Everyone on the Executive Team has been very welcoming, and I definitely feel part of the IRMS family. It has been a new experience for me juggling my day to day work, running my own business and family life, as well as fulfilling my role in the Society. I see how hard everyone works on the team and how passionate we are about the Society. Personally, I take my hat off to you all, well done everyone!

It has been a busy year looking at ways in which we can help the Society to attract new members and look at other ways to make our content more interactive and engaging for our members. One of the ideas for this was to create videos with key members in the industry, and I am pleased to announce that our first video will be with Alison North, celebrating her 50 years in the industry.

We have been doing a lot of work to identify the sectors and areas where we have a limited presence, and therefore, have been conducting more presentations and have had more speaker opportunities to promote the Society. We have also exhibited at a few places this year, including an event for the MOD, the Internet library international and taxonomy bootcamp, and the upcoming Information Commissioner's Office conference. I am continuing to work on our promotional material that we give out at events and am also looking at more economical options for us.

I am currently reviewing the IRMS website, and one of the things I would like to

do is to make it easier for people navigating the site to find our membership options in a more clear and concise way. We will also be carrying out an SEO review of the website to make sure we are optimizing the site to its full potential to maximise our growth.

Unfortunately, our fantastic Communications Officer, Jess, is leaving this year (but for a great reason!). She has been absolutely fantastic and supported me in my role, and has done some great work with our social media presence including Twitter hour. Thank you, Jess, for all your hard work, you will be greatly missed. As Jess is leaving, this opens up the opportunity for someone new to join the team and bring more new ideas to the role.

The conference this year in Birmingham has a great programme of speakers and Joe and the team at Revolution Events have been working extremely hard to provide yet another great conference for us all. I look forward to the year ahead and seeing everyone in Birmingham.

Membership Director

Katharine Stevenson



I took on the role of Membership Director in May 2019. I knew I had some big boots to fill and was slightly nervous, but everyone on the Executive (Exec) has been so welcoming and helpful. I remember sitting with the then new secretary, David Reeve, while Fiona Kearney (ex-Secretary) gave us an overview of membership reporting and the database, both of us looking nervously at each other. Can we do this? Please don't leave us Fiona! But I'm pleased to report that we appear to have nearly made it to our anniversaries, and didn't have to pester Fiona... too much.

Much of my day-to-day role involves supporting IRMS members with general queries on their membership. To the Exec, I provide membership statistics through monthly reports, so we can track trends on membership rates. 2019 was a very successful year for membership numbers and this is all down to the collective effort of everyone in the Exec; those who also volunteer in running our popular Group events; our Conference and Sponsor partners; and, of course, our members in making our Society what it is.

I have spent the start of my tenure considering ways we can improve the membership experience. I have looked at current benefits for our different membership types (Individual, Corporate, Affiliate, Student) to make sure they represent value to the member types. I am starting work with our Training Director on how to encourage student members to join, and then continue as Individual members. I've had

Much of my day-to-day role involves supporting IRMS members with general queries on their membership.

approval for surveys to send to members who do not renew, so we can understand reasons members leave the Society. This was launched in April 2020.

The main programme of work I've been working on since joining the Exec has been on our "Diversity and Inclusion" agenda. I raised the importance of this topic back in October and since then have been working on how best to take this forward. A number of ideas have been floated, and I'm pleased to say that a number of initiatives and activities will soon be kicking off. Hopefully, by the time you read this, our new Diversity and Inclusion Statement will have been published on our website. A new online Diversity and Inclusion forum will have also been launched on our website. This is where I and other members of the Exec plan to start discussions on the topic of diversity and inclusion. None of us pretend to be experts in this, and the Exec team recognises that it is limited in its diversity itself. So, this is one topic we're keen to take the true meaning of inclusion and make this an IRMS-wide programme of work and look forward to your thought's, ideas and feedback in this forum.



Another successful year for the IRMS and, consequently, much work has been undertaken by your (voluntary, hard-working) Executive!

As a member of the Executive, I have contributed to the overall development and improvements, as defined in the work programme, by attending the Annual Conference, monthly Executive conference calls and three offsite Executive meetings.

My new role this year is that of Professional Standards Director. The primary objectives being:

- 1. To maintain knowledge of current laws and regulations pertaining to Information and Records Management;*
- 2. Understand new (and proposed) laws and regulations pertaining to Information and Records Management and pass this knowledge on to the wider IRMS Membership;*
- 3. Represent the IRMS on national and international standards organisations, as appropriate, eg, the International Standards Organisation (ISO) and the British Standards Institution (BSI);*
- 4. Lead the development of relevant sample Information Management, Records Management and Data Management Policies and Procedures, to assist those new to this critical area of expertise.*

My main input this year has been:

IRMS Bulletin

I have attended some calls during the year, as part of the team identifying ideas for improving the Bulletin and increasing (to some degree) the amount of revenue generated by the Bulletin. We are attempting to "sell" more advertising space to increase revenue, whilst being careful not to include too many advertisements. If you are aware of any organisation which would benefit from advertising in the Bulletin, please do not hesitate to let me and/or Revolution Events know and we will contact them. Any increase in revenue will benefit the membership. Alternatively, if you have any comments or suggestions with respect to the Bulletin, please do not hesitate to contact us!

Exec Meetings/Calls

I have attended all quarterly face to face Exec meetings and most monthly calls and made a contributions to the discussions and idea gathering. In particular, I have made a number of suggestions regarding the IRMS Annual Conference – this year at the Hilton Hotel, Birmingham International.

Groups – Independent Consultants

Notwithstanding some initial interest, I have not received much feedback from participants in terms of an agenda, and, consequently, no meetings have taken place. I plan to make new efforts to establish this Group, subject to time availability and progress made with the Financial Services Group.

Groups – Financial Services Records Management Forum (FSRMF)

Predominantly, as a result of significant work pressures on our regular attendees, with respect to regulation, we have not held any meetings this year. However, at the time of writing, I am nearing completion of arrangements to hold a meeting, sponsored by our friends at Automated Intelligence, inviting members of the FSRMF, IRMS and those employed by regulated industries/professions, such as pharma, tobacco and energy.

British Standards Institution

BS10008/BIP10008 – Legal Admissibility I attended a number of working group meetings, on behalf of IRMS members, to provide input from an IRMS perspective. These resulted in a final draft released for public consultation in Q3 of 2019. I ensured that all IRMS members were made aware of the facility to provide their input/recommendations via a notice in "Off The Record". The work group met to review public feedback and the final version was published this month.

BS10012 – Data Protection I represented the interests of the IRMS membership by participating in the working group which re-wrote the British Standard to reflect changes required by GDPR. This revised standard has now been published.



Welcome to the new decade. It's been 3 years since I took over the Training portfolio and it's been another busy year on both a personal and IRMS front.

The year saw us launch a new training partnership with Freevacy and another with Templar Executives. Both of these were driven by your feedback, when you mentioned that you wanted to have a discount on cyber security courses and I had several queries at conference in 2019 as to whether we could have a discount for CIPP courses. Hopefully you are making use of these new opportunities, as I aim to ensure that the training offering is one of the best bits of being a member. There is a huge range of courses now available, covering almost every aspect of our Profession.

This year also saw the re-launch of our Mentoring scheme. This clearly filled a gap for our members, as we were inundated with members wanting to be Mentored. Unfortunately, the take up to be a Mentor didn't have the same flurry of enthusiasm, so we now have a waiting list. If you can spare time to help someone new to the profession develop, please consider doing so. I am a Mentor personally and it is highly rewarding.

My remit this year also extended to reviving the IRMS podcasts, where James Lappin has kindly taken up the challenge and the first podcast was launched in January. We have a stream of ideas for podcasts for this year and, as I type this, the plans for the next recording are full steam ahead. I hope you find them exciting and informative, and if you have any ideas for speakers or topic please drop me a line.

The year saw us launch a new training partnership with Freevacy and another with Templar Executives

We are also lining up an agreement with AIIM to further extend the ability of members to access e-learning. This will give you a discount on their courses without being an AIIM member. The timeline is still being worked out, but it will be at some stage in 2020.

I also picked up the role of liaising with the Accreditation Committee this year. We are working through how to speed up the process, but it is dependent on a wonderful team of volunteers, so please bear with us. If you are an Accredited member and would be interested in joining the sub-committee or panel of assessors, again please let me know.

It's been a year of changes with new members of the exec bringing new ideas, enthusiasm and challenge. We are working closely together to ensure the training offering compliments all the other membership benefits.

Lastly, on a personal note, I hope that you've all kept safe during the pandemic. For me, it's involved postponing a wedding. Let's hope 2021 is pandemic free.

Accreditation Sub-Committee

The Accreditation Programme continues to progress through 2019 and into 2020, with 11 accreditations being awarded to members from May 2019 to date.

We have faced challenges around resourcing and knowledge management, which are starting to be worked through. For example, the Sub-Committee (S-C) is currently responsible for the administration of accreditation applications and this is proving to be challenging, with other commitments and day job pressures. Therefore, we have started to document each process and agree on what can be performed by Kingston Smith, to ensure that members and applicants have a smooth process and we aren't reliant on goodwill and spare time to progress applications. We hope to have this finished during 2020, so that the S-C can re-focus on training more assessors and growing accreditation even further.

The viva and paper applications continue to work well, with members favouring which options suit their method of expressing themselves. We have been able to run viva interviews at events like Conference and Group events and, while they are still in the trial phase, these, so far, are going well. One thing we want to explore for 2020 onwards is a more formal structure for running such events at Group days. Keep an eye out for news from your local Group Chair for days we might run in your local area.

The Society would like to thank Rachel Maguire for her time as Chair of the S-C. Her team of Sarah Norman, Scott Sammons, David Smith and Deirdre Allison have done sterling work to progress accreditation, especially in Central Government where accreditation is growing well. Rachel stands down in May 2020 and Scott has agreed to Chair the S-C, while the admin handover is established, assessors are trained and recruited, and the S-C can recruit more volunteers to help take accreditation into 2021 and beyond.

Awards Panel

The IRMS Awards Programme continues to gather strength and standing in the profession. This year, we have completed work to agree and publish a simplified process for making nominations and some supporting guidance for what sort of things each criterion is looking for. We have noticed that, for the 2020 Awards Programme, this is starting to add benefit to the types of nominations that are received; however, there is some more work to do to add more value and support to the criteria and encourage people to get involved and make nominations.

We are particularly proud that the Alison North New Professional Award is 10 years old this year and is something we plan to celebrate and hopefully build on for 2021.

Since the panel was reviewed a couple of years ago, the membership has grown, with the plan that the post-2020 will be relatively independent of the IRMS Executive. The membership for May 2020 onwards will consist of Sarah Norman, Heather Jack, Jane Profitt, Ben MacCorquodale and Roger Poole. I will remain as an administrative support to the panel purely to hand over knowledge and agree a process for

We are particularly proud that the Alison North New Professional Award is 10 years old this year

Kingston Smith to take on the basic admin of things like the mailbox.

Other priorities for 2020–21 include a ‘fresh eyes’ review of each category, to ensure it remains fit for purpose in a modern profession, and a 10 year checkpoint review of the New Professional Award with Alison North to decide where we want the award to go into the next 10 years.

My thanks go to Neil Reeves and David Paris for their work on the panel, both of whom stood down this year.

Scott Sammons on behalf of the IRMS Awards Panel

IRMS Ireland Group Committee met frequently and organised three seminars in 2019 – in June and September, both held in Dublin venues, and a final one held in Belfast City Hall in November.

The June event themed “Saving for the Future and Preserving the Past – pathways for information management” was held in the Irish Architectural Archives on 27 June 2019. This was a full-day event. In the morning, our three speakers delivered presentations on:

- The importance of training as a key aspect of Information Governance,
- Changing Approaches to Appraisal,
- It all Starts and Ends with the Data! – Creating a Data Privacy Culture – The GDPR in Practice – 1 Year On.

We then had a panel discussion. The afternoon session presentations related to “Staff awareness training”, “Records management in a US Senate Office”, and “Dealing with fire- and water-damaged documents – tips for effective planning and response”, followed again by a panel discussion. This was an excellent seminar with very valuable sharing of information. The IRMS sponsored this meeting.

Our September evening seminar was held on 12 September 2019 in the prestigious Royal Irish Academy in Dublin and themed as “Archivists and Records Managers Joint Event ‘Accreditation’ – Your Route to Recognition as a Professional”. This seminar was organised jointly with IRMS Ireland Group and the Archives and Records Association, Ireland (ARA,I) and was generously sponsored by Equiniti ICS and by the ARA,I. The seminar aimed to provide information and inspiration relating to the route to gaining recognition as a professional for archivists and records managers.

IRMS Ireland Group third, and final, seminar for the year was a fully subscribed full-day event, with 70 attendees, held in the “The Reception Room” in Belfast City Hall. This seminar was titled “Records Management Matters – the importance of ensuring

authentic records”. The theme was taking account of the turbulent times of unprecedented change in which we now work, and how we will need to manage federated content, along with extending responsibility. This seminar looked at the pitfalls associated with not keeping essential records and how to overcome them. Our morning presentations were “Good Information Governance”, “Reviews of Records Management in the NICS”, and “The Value of Information Asset Registers” followed by Panel Discussion. The afternoon session comprised presentations as follows: “Build to Share – EDocs – rollout update for Build to Share in Irish Government”, followed by “Getting back to the basics”, and then our final presentation was on “IRMS Accreditation”. We received great feedback on this event and have attracted new members as a direct result of it. Thanks to Belfast City Hall for hosting the event and to Equiniti, who sponsored the catering.

Throughout the year, the Chair and Secretary, along with Committee Members, worked very well together to secure and finalise venue arrangements, develop seminar programme agendas and engage with excellent speakers. Our format for full-day seminars of morning and afternoon sessions, with each session comprising three presentations followed by a session panel discussion, worked very well and was key to both engagement and networking for our members in a highly positive way. The panel discussions were aimed at engaging the speakers and attendees in a conversation around the overarching theme of each seminar. We also adopted this format for our evening seminar – one session here instead of two. Special thanks here to all of our IRMS Ireland Group Committee Members, who pull together to make the seminars happen.

Our IRMS Ireland Group AGM was held straight after the seminar on 21 November hosted by Belfast City Hall, as arranged by Robert Corbett. As well as continuing with our existing committee members and roles, we also welcomed a new committee member.

IRMS London Group

Group Chair: Emily Overton

During 2019, IRMS London held three meetings, two of which were in the evening and one was a full-day event. These covered Information Security, Information Risk and Data Ethics. There was a fourth event planned, but due to client work conflict, this had to be cancelled and couldn't be fit in before the end of the year.

It was found that attendance in evenings was not as committed and, despite getting 25+ bookings on events online, less than 10 were turning up. This may be down to sickness, last-minute issues or being too tired at the end of the working day. 2020's plan was to focus on full-day events, as the full-day event attracted 60 people with ease, since people were booking the whole day out. It was also found to be key to send out reminder e-mails of the event, to increase the chances of people turning up.

Since September, we also chose to look for multiple sponsorships, breaking down the parts of a meeting that require sponsoring, such as food, travel & expenses and venue. This has proven popular with smaller businesses, as they are able to assist more so than just one large package with exclusive sponsoring.

In December, Bilal Ghafoor stepped away as London Group Co-Chair and Emily Overton has continued as Group Chair by herself. The intention is to offer out to newer people in the profession the opportunity

to learn networking skills under the mentorship of Emily, whilst helping out with IRMS London on the day. The majority of organising will be completed by Emily, but offers for help on the day would be much appreciated. The IRMS would like to thank Bilal for his time that he gave so willingly to IRMS London.

IRMS London would like to thank Oyster IMS, Leadership Through Data, Taylor Wessing, Facet Publications, Storetec Ltd, Protecture Ltd, Department of Health, Castlebridge, 2040 Training, who were our supporters, sponsors and venue providers throughout 2019. Thanks to these organisations, we were able to deliver the events without going over budget.

IRMS London would also like to thank Daragh O'Brien, Tim Turner, Phil Booth, Phil Chamberlain, Inga Kroener, Sarah Clarke, Paul Maskall and Scott Sammons for giving up their time to speak at IRMS London in 2019. These speakers helped IRMS London deliver such fantastic events with amazing feedback.

2020 plans include:

11 February A-Z Commissioning and Implementing of an EDRMS

2 April Tim Turner – Webinar: Mischief Managed: Unfounded and vexatious requests under FOI and DPA.

13 October Privacy by Design: What is privacy?

IRMS Third Sector Group

Group Chair: Gary Shipsey

The group had a relatively quiet 2019 due to unforeseen work commitments of the volunteers.

An event was held in March. This saw guest speaker Bev Adams-Reynolds, Data Protection Officer at Crisis, providing practical, current advice on what she is learning, as she works to bring records management principles and practice into Crisis. Next, Jacqueline Stockwell,

CEO & Founder of Leadership Through Data, took the group through the many different passive and participatory ways people learn – so we can make records management interesting and relevant to staff. A game of records management 'Snakes and Ladders' then began! The group is looking to kickstart 2020 with events aimed at the records management novice within the charity sector.

IRMS North Group

The North Group held three very successful events during 2019. In March, in Preston, Rachael Maguire, from the LSE, and Michele Noad, our very own IRMS SPOG Group Chair, held half-day workshops on 'File planning' and 'MS 365/ SharePoint', respectively.

In Durham, for the summer meeting, we had 'Lessons in Managing Risk' from Liz Taylor of TKM Consulting, Simon Allen of Oyster IMS, Tim Hanstock of Oldham Council and Colin Hopkins of Durham University.

In Manchester, in October, we branched out into 'Information Governance Futures' with Stephen Girling from Greater Manchester Combined Authority, Brendan Sheehy of the Department of Health and Social Care and data-sharing denier Tim Turner of 2040 Consulting.

We've tried to maintain an open slot for any member who'd like to try their hand at speaking, or has a message to get across to IRMS, and we hope to do this again in 2020, so interested members can always contact us at <north@irms.org.uk>

Many thanks to sponsors, the Verat Group and OysterIMS, for supporting these meetings during 2019, and Trish Ashcroft for always being willing to host us at Preston City Council. This support is much appreciated, as is the support of the speakers and the North Group members, contributing to some fantastic days out in 2019.

Thanks also to our Groups Director, Jaana Pinnik, and the other Group Chairs for their support during the year.

IRMS South West Group

The South West IRMS Group held two events during 2019.

The first event in March was on 'Managing Information to Support Standards, Compliance and Business Needs' and included some thought-provoking and practical solutions on Information Audits, 'Big Buckets' and Retention Schedules, presented by Reynold Leming, Informu Solutions Ltd; Jaana Pinnick, British Geological Survey; and Paul Gibbons, FOI Man.

The second event in July was on 'Managing Information to Support Evolving Organisational Requirements'. Scott Sammons, Director of Lighthouse IG and Chair of the IRMS, and Alan Shipman, Group 5 Training Ltd, gave informative and interactive sessions on Information Strategies, Expectations and Culture, Legal Admissibility, Privacy and ISO 15489. The day concluded with a workshop, enabling attendees to discuss their strategic approach, use of standards and codes of practice and their issues and concerns.

Both events provided attendees with theories, standards, practical solutions and approaches for developing and reviewing their strategies and programmes, together with the value of understanding and appreciating organisational needs, expectations and cultures to ensure compliance and best practice.

Events provide opportunities to hear from experts in the profession, to take away some helpful tools and strategies and to discuss and share best practice. Event attendance is relatively low, considering the geographical area, so members are encouraged to attend events and to help establish a network of IM professionals from a wide range of sectors and organisations within the region.

David Paris stepped down as the Scotland Group Chair half way through the year before handing over the group to me, Maria Lim, as the new Chair. I can report that there were events in Edinburgh in the first half of the year where IRMS Scotland members had been invited.

Events

I hosted my first Information Management Continuous Improvement in O365 in Aberdeen. There continues to be a lot of interest in the materials as reference; however, attendance is quite low compared with Central Belt events.

Collaboration

Internal

I have started to more actively engage with regular messages to the membership using the IRMS messaging platform. We started our first e-newsletter, Scottish Rain, issued in October, where we have received a number of good feedback. Heather Jack was instrumental in this initiative, together with the other committee members. We will be issuing the second issue this first to second week of February, with an article provided by the PRSA team, who requested a regular spot on the newsletter.

Although we would continue as a default to defer to the IRMS website for collaboration, we acknowledge the fact that LinkedIn as a platform is more widely used and preferred for more active discussions. In 2020, I will be cleaning up and organising the membership and admin of our LinkedIn Group to initiate

more active discussions.

External

With the help of Claire Johnson, I was able to have productive meetings with the Scottish Council on Archives and the National Records of Scotland, specifically the Public Records Scotland Act Team. We have agreed to have more active collaboration events and social media presence.

The Oil and Gas UK IM Forum has invited me, as Scotland Chair, to be active on the Forum and explore areas of collaboration between the two organisations.

Committee

I have quite a strong group of committee members and advisers, who help and support me in my role. However, like most voluntary organisations, we have to deal with varying availability to actively support throughout the year.

Membership

Our activities have generated renewed interest on membership; however, we still need to continue to provide events and activities continuously to encourage new members. Once we have established a number of value-added events and initiatives, I will plan to campaign more actively to encourage new members.

IRMS Public Sector met three times in 2019. *A fourth event due to be held in October had to be cancelled because of demonstrations which were ongoing in the Westminster area.*

Over the three events, we attracted 113 delegates from 91 different organisations across the public sector. We have a core of delegates who attend all our events, and a number of delegates who attend when the subject matter interests them.

Following on from a consultation with members of the group at the end of 2018, we choose the following themes: March event – SharePoint, Office 365, E-mail Management and Metadata and Taxonomies; July event – Access to Information and Records Management, including GDPR; December event – Records Managers' Christmas Box, with topics ranging from the

management of structured data, business continuity, records management from a user perspective, GDPR and a light-hearted look at records management as it is portrayed in film and television. I would like to thank all our speakers, James Lappin, Robert Bath, Jonathan Engel, Scott Sammons, Paul Gibbons, Alison North, Graham Snow and Marc Barber. The group events rely heavily on the willingness of our speakers to share their time and expertise.

I would also like to thank the team who help to organise the events, Sarah Graham, who looks after all the communications, and our finance officer, Ashley Lardner, who took over from Gordon Wanless during the year. I would also like to express our thanks to Jaana Pinnick, Groups Director, and Suzy Taylor, Groups Officer, for their support during the year.

IRMS SharePoint and Office 365 (SPOG)

The SharePoint and Office 365 group (SPOG) has had a busy year. The group has been active on the IRMS website, widening the remit of the group, growing membership (now 320 members registered), and uploading various blogs.

SPOG held a successful event on 14th January in Bracknell themed around 'Accelerating your Office 365 journey at speed', which welcomed 80 attendees from a wide spectrum of organisations. Topics covered included information management transformation, controlling SharePoint sprawl, Office 365 information architecture, labels and retention policies, content classification and folders vs metadata. Attendees heard

from Limerick County Council and Bracknell Council, with regard to their records management journeys with SharePoint. The event was kindly sponsored by Equiniti, who also discussed user experience, automated e-mail and record capture. The feedback received was very positive, and the various topics covered were felt to have been of great benefit to all.

This year has also seen the Group committee expand with the introduction of Rob Bath from Intelogy as Group Technical Officer, Lauren Finnemore from Somerset West & Taunton Council as Group Officer and Bryony Leventhall from the Bank of England as Group Officer.

Accounts for the year ended 31 December 2019

Information and Records Management Society

Income & expenditure accounts for the year ended 31st December 2019

	2019	2018	2017
	£	£	£
INCOME			
Subscriptions	105,556	113,984	107,227
Sponsorship, advertising and meetings	251,801	257,182	221,537
Interest received	74	79	16
Other income	–	–	5
TOTAL INCOME	357,431	371,245	328,785
EXPENDITURE			
Administrative and office expenses	35,436	41,022	45,973
Bulletins and newsletters	34,464	46,579	56,344
Groups	8,884	10,646	10,298
Postage	375	276	396
Stationery	120	137	665
Telephone	1,084	813	1,320
Gifts	879	190	44
Officers expenses	997	3,131	12,330
Training costs	–	–	1,144
Accountancy fee	1,025	1,250	850
Bank charges	3,580	3,155	2,008
Annual conference	241,030	217,272	166,288
Exhibitions	–	244	781
Advertising	3,729	2,868	4,863
Website	8,975	8,424	12,015
Travelling and accommodation costs	14,805	14,164	14,382
Insurance	1,112	1,127	1,229
Computer running costs	2,330	2,032	1,181
Schools toolkit	1,301	–	–
Accreditation schemes	710	–	–
Bad debts	1,782	–	1,985
Miscellaneous expenses	231	–	–
Subscriptions	249	284	274
(Profit) / loss on foreign exchange	62	96	–
TOTAL EXPENDITURE	363,160	353,710	334,370
(DEFICIT)/SURPLUS FOR THE YEAR	(5,729)	17,535	(5,585)

Information and Records Management Society

Balance sheet as at 31st December 2019

	2019 £	2018 £	2017 £
CURRENT ASSETS			
Trade debtors	1,296	6,076	—
Prepayments	20,537	22,541	895
VAT repayable	1,513	2,858	—
Cash at Bank and on Deposit	83,336	98,761	76,119
ASSETS	106,682	130,236	77,014
CURRENT LIABILITIES			
Creditors and accruals	5,114	49,836	13,772
Bank overdraft	—	—	807
VAT payable	—	—	316
Deferred Income	56,871	29,974	29,228
LIABILITIES	61,985	79,810	44,123
NET CURRENT ASSETS	44,697	50,426	32,891
GENERAL FUND			
At 1st January 2019	50,426	32,891	38,476
(Deficit)/Surplus in the year	(5,729)	17,535	(5,585)
As at 31st December 2019	44,697	50,426	32,891

In accordance with the engagement letter dated 13th March 2019, I approve the accounts set out on pages 2 to 3. We acknowledge our responsibility for the accounts, and for providing Josolyne & Co with all information and explanations necessary for their compilation.



David Bowen, IRMS Treasurer
On behalf of the Executive Committee
Date: 18th March 2020

ACCOUNTANTS REPORT

We have prepared the accounts for the year ended 31 December 2019 from the records and explanations supplied to us by Kingston Smith Association Management.

Josolyne & Co, Chartered Accountants, Silk House, Park Green, Macclesfield, Cheshire SK11 7QW
Date: 18th March 2020

