



Annual Report & Accounts 2020/21

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 2020. It also includes the Society's Annual Accounts for the calendar year of 2020.

The report is made up of an overview of our activities, written by me, then individual reports from each Director, Officer and Group Chair. This year is my first report as Chair of the Society; within it I have reflected on the work that has been achieved over the last year by the team in the challenging times of the pandemic.

Please do 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 work and operation of the IRMS is facilitated by the dedicated, enthusiastic and hard-working efforts of our volunteers and third parties. I want to give a huge and heartfelt thanks for all that our volunteers do, as they give their time and commitment whilst also maintaining a day job. This investment of effort and talent is amazing. I have enjoyed working with all of them to date and look forward to us implementing our exciting plans for the future. Additionally, the third parties we work with all demonstrate a wonderful commitment to the Society.

I hope you enjoy reading the reports and thank you all for being members of the foremost professional membership organisation for everyone engaged in the management of information.

All the best,



Reynold Leming AMIRMS, FIRMS, Chair

Chair

This is my first annual report as Chair, so I shall begin with paying tribute and giving a huge thanks to my predecessor, Scott Sammons. Scott put in huge amounts of effort, expertise and enthusiasm during his time of Chair. He has been involved with the Society's Executive since 2012 and has served as Groups Officer, E-Officer, Membership Director, Treasurer and Chair. He has led the Society with great commitment, enthusiasm, expertise and energy, leading for example the delivery of our new digital presence, expanded content and more streamlined operations. Even since standing down as Chair, in the capacity as Immediate Past Chair he has continued to invest the same qualities in the Awards and Accreditation processes, and of course he has so splendidly co-hosted the monthly IRMS Pub Quiz with me. The current state of the Society's strategic direction and robust and effective administration and governance derives in large part from the changes he has led. He has been an excellent colleague and will remain a good friend. I am sure that all members of the Executive and Groups teams, Society members, fellows, suppliers and partners raise our hats and a glass to him.

At the time of writing, I must also bid a fond farewell to two other colleagues on the Executive: **Katharine Stevenson** as Membership Director and **Laura Stockwell** as Marketing Director. I thank both enormously for their contributions, which include Katharine's work on the development of our evidence-based Equality, Diversity and Inclusion strategy and Laura's work on detailed analysis and mapping of our membership sectors and offerings which underpin our Marketing Strategy.



2020 has of course been a very different and challenging year for us all. However, I am delighted to report that the Society is in a good place operationally and financially. We have also been able to deliver key events, such as the Annual General Meeting and our annual Awards Ceremony, on a “virtual” basis and have provided webinar content on a regular basis since the pandemic began. I would like to thank all volunteers who have made such enormous contributions to deliver so much virtually.

Again, despite the challenges, I am very proud of what the team has delivered and I would like (in addition to things already mentioned) to provide key highlights below:

Charity status: Following an AGM and a subsequent EGM (to clarify our one member, one vote policy) the Society has successfully become a Company Limited by Guarantee on our transition to subsequently gaining Charity status. My great thanks to our Treasurer **David Bowen** and our Secretary **David Reeve** for their work on this, as well as their other activities in keeping the Society financially resilient and operationally smooth. In these and many other areas, our administrator MKSAM has provided us invaluable support.

Conference: We have over the last year had to twice postpone the planned Birmingham conference and at the time of writing hope that it will be running as an “in person” event in November 2021. However, all the work around logistics, content, sponsorship and delegate experience has continued throughout and I want to say a very big thanks to our Conference Director **Joe Chapman**, Conference Officer **Andrew Harvey** and the team at Revolution Events.

Customer Advisory Board (CAB) with Microsoft: This new board (and the

membership engagement forum we have established in support) provide the records management community with a direct relationship with the Microsoft 365 development and leadership teams, allowing us to influence the future direction of the platform’s capabilities. This is such a fantastic strategic initiative and I want to give my huge praise and thanks to **Maria Lim** (now Chair of our new Information Management Technology Group) and my colleagues Digital Director **Robert Bath** and Digital and Training Officer **Penny Wright** for their work on this.

Digital DPIA (Data Protection Impact Assessment) project: The involvement of the IRMS in the Digital DPIA (Data Protection Impact Assessment) project is ongoing. The first version of the solution, called Dapian, is now released. Dapian is a digital platform that will guide and assist you in the completion of a DPIA. Coalescent has developed the final product, and we are delighted to say that they are offering IRMS Corporate members a discount on annual subscriptions.

Groups and Events: Since the pandemic started, we have seen many webinar events run by the IRMS covering a wide range of topics, as well as the monthly #IRMSHour Twitter events and other activities like virtual coffee mornings. I want to thank all colleagues, including members of the Executive and our Group Chairs, for their hard work in delivering these. Videos of many of the webinars are now available to view on the IRMS YouTube channel. We have also seen new groups created including Information Rights (chaired by **Emily Overton**), Digital Preservation (chaired by **Linda Shave**), the Channel Islands & Isle of Man (chaired by **Harvey Burgess**) and

Chair

Schools (chaired by **John Walker**). For all the above I would like to give a very big thanks for the tireless efforts of Groups Director **Suzy Taylor**, Groups and Volunteer Officer **Heather Jack** and Communications Officer **Melissa Kennedy**, as well as the work of Rob and Penny on the digital team.

Related to Groups, a special thank you to Vice Chair **Jaana Pinnick** for helping set up the new group and all other areas of advocacy related to Digital Preservation. Also a special thank you to **Elizabeth Barber** for fantastic ongoing work relating to the evolution of the Schools toolkits and supporting John with the new group.

I would like also to thank all the efforts and insights of Professional Standards Director **Roger Poole** in leading our engagement with national consultations, Private Sector and Commercial Development Director **Simon Ellis** in developing our Sponsor Relationship Management strategy, Commercial Development Officer **Ed Irving** in ongoing Bulletin Production (working in conjunction with Tribal to keep it the wonderful publication it is), Training Director **Sarah Norman** for continuing to bring on new partners, as well as all the other things they do!

I end with my very best wishes to all at this time and look forward to catching up in person with many of you as soon as this is possible. In the interim, please all keep safe and well.

Vice Chair

This time last year I was getting ready to hand over my duties as Groups Director to my successor Suzy Taylor. That seems like a lifetime ago at the time of writing my report!

Working with IRMS groups for two years was a great introduction to the Executive, as I got to know all the Group Chairs and see what fantastic work they do for the Society and its members. The Group Director's role took me around the UK as I visited many of the groups and heard from a great variety of enthusiastic speakers who shared their particular projects and expertise. It was great to see how our members discovered new ideas at these events to take back to their workplaces, which certainly adds value to delivering our events to the membership and beyond.

I also worked together with the Groups and Volunteers Officer writing a new Groups Strategy and a Group Chairs Handbook to help the incoming Groups Director and the Group Chairs in their work planning and development, as there was a lot of change on the cards. As we now know however, the life as we knew it including IRMS events was to change completely in 2020. One of the initiatives that I had proposed when joining the Executive, which was delivering group events online, became much more pressing and relevant, so after doing some initial research we selected Livestorm as our preferred platform for online activities. It also became very handy for other purposes, such as for our popular quizzes run by the Chair and the Immediate Past Chair in the lockdown.

Before stepping down, I handed over the Group Director duties to Suzy, and together



we interviewed our new Groups and Volunteers Officer, Heather Jack, who after one year in the role is now moving on to be the Membership Director.

Our Annual General Meeting was held online in 2020 and it turned out to be a very successful format. I was formally elected to join the IRMS Executive and the Constitutional Officers Group as the new Vice Chair, which was hugely exciting, and I was looking forward to the Conference later in the year where I could step into my new role. Little did I know this was going to happen in a very different way from the standard vice chair handover as we, and many other organisations, were sadly unable to deliver our annual conference in 2020.

So after the AGM in June, I took over from Reynold Leming who as the previous Vice Chair achieved a great deal for the IRMS. His work included refreshing the Society's information governance policies and procedures, and creating a standard set of contract terms when we work with third parties. I am now very pleased to be working with him as the new Chair of the Society. My professional background in public sector research data management is very different from that of Ren's, and I hope we complement each other in a way which is for the wider benefit of the Society.

One of the things I share an interest in with Ren is digital preservation, which apart from research data and grant management is the second half of my day job. I wanted to develop IRMS activities in this area for the members who over the years have expressed an interest in digital preservation at the Society's events which I've attended. I have also agreed to provide updated content on digital preservation to some of the Society's tools such as the Schools Toolkit.

In November 2020, on International Digital Preservation Day, coordinated by the Digital Preservation Coalition, I put out a call for expressions of interest to our members with a view to form a new IRMS group. We received a good number of replies, so in January 2021 we were able to officially form a Digital Preservation Interest Group. It did not take us long to find and appoint a Group Chair, Linda Shave, who has a wealth of experience and knowledge in the profession and will be leading the Digital Preservation Interest Group going forward. The group will be looking into developing a Digital Preservation Toolkit and setting up links and networking opportunities with the wider digital preservation community out there.

One of the key deliverables of the Executive this year, amongst many others, was the production of an IRMS Executive Handbook which lists out the usual activities for each member of the Executive. This work was initiated and led by the Immediate Past Chair who wanted to ensure we improve our knowledge management and transfer processes and capture the outgoing experience. I am sure this book will facilitate the new Directors and Officers when they join the Executive.

It may sometimes look like we are playing musical chairs as the Executive members move from one role to another but it is a fantastic experience, helping those involved to learn more about the way the Society operates and giving them an opportunity both to share their skills and learn new ones.

IRMS Treasurer's Report Financial Year 2020

David Bowen



27 March 2021

Once again, I am writing at a time of some uncertainty. Because of the virus, our accountants have not been able to produce accounts in time for the Bulletin. I am therefore offering these provisional accounts, and will publish the official accounts in the Bulletin when the accountants have finished them. I will start by thanking the Constitutional officers and members of the Executive Committee of the IRMS. I am also grateful to the staff at Moore Kingston Smith Association Management ("MKSAM", our administration partners) and Revolution Events ("Rev", our Conference partners). Partners like KSAM and Rev make our jobs as volunteers feasible.

The accounts for 2020 look very different from earlier years. Consider the income and expenditure account: income in 2020 was £131,600; mostly from subscriptions (£120,236). Total income in each of the past 3 years was over £300,000. The difference is that the Conference accounts have been handed over to Rev, who will manage both income and expenditure for the Conference, and will report a final result to us about 2 months after the end of Conference. This makes our accounts more realistic and intelligible. Conference supplied over £250,000 of income and over £200,000 in expenditure in previous years. However, other Conference income and expenditure was handled by Rev directly, so the real effect of Conference on our accounts was never clear until July, when the surplus was agreed. (Our 50% share of Conference surplus was £36,182 in 2019; £32,436 in 2018; and £47,993 in 2017). This shows that Conference is about 25% to 30% of our real net income in a good year.

Another way of looking at this is: our basic costs are about £123,500 (made up of: Bulletin, £40,000; admin support, £35,000;

bank, computer and other charges, £18,500; Groups (2020 was much less because of remote virtual meetings) typically £10,000; officer expenses, travel and accommodation (2020 was less because we held mainly virtual meetings) typically £20,000). This means that our subscription plus advertising income (Bulletin and the Jobs Board) is enough to fund our basic operations.

That means that the Conference surplus and sponsorship for Group meetings can be used for new initiatives (such as accreditation, toolkits, podcasts, ...).

However, there is no guarantee that Conference will always make a surplus; we might hold a Conference and lose £50,000 or even more. For that reason, I would like to see our reserves increased to £90,000 or even £100,000. (They are now £72,902, thanks to a surplus in 2020 of £28,206.) Also, there are initiatives that the Society should be able to invest in, and we need a strong general fund to allow us to invest confidently.

Some specific comments: The "Other Income" (£5,072) is almost all from the Publishers Licencing Society (payments on copyrights mainly for the Bulletin). The "Annual Conference" item in expenditure (£3,938) is mainly the costs of the IRMS team arranging (and rearranging) the Conference. The "Bank Charges" (£2,937) are (in my view) too large. We are paying more than we should for services around credit cards and direct debits. I would like to see this examined in the next year.

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

Provisional unaudited accounts for the year ended 31 December 2020

Information and Records Management Society

Provisional income & expenditure accounts for the year ended 31st December 2020

	2020	2019	2018	2017
	£	£	£	£
INCOME				
Subscriptions	120,236	105,556	113,984	107,227
Sponsorship, advertising and meetings	5,851	251,801	257,182	221,537
Group sponsorship	350	–	–	–
Interest received	91	74	79	16
Other income	5,072	–	–	5
TOTAL INCOME	131,600	357,431	371,245	328,785
EXPENDITURE				
Administrative and office expenses	35,434	35,436	41,022	45,973
Bulletins and newsletters	39,375	34,464	46,579	56,344
Groups	2,964	8,884	10,646	10,298
Postage	163	375	276	396
Stationery	211	120	137	665
Telephone	578	1,084	813	1,320
Gifts	103	879	190	44
Officers expenses	2,647	997	3,131	12,330
Training costs	–	–	–	1,144
Accountancy fee	2,030	1,025	1,250	850
Bank charges	2,937	3,580	3,155	2,008
Annual conference	3,938	241,030	217,272	166,288
Exhibitions	–	244	781	–
Advertising	1,134	3,729	2,868	4,863
Website	3,494	8,975	8,424	12,015
Travelling and accommodation costs	2,704	14,805	14,164	14,382
Insurance	1,233	1,112	1,127	1,229
Computer running costs	4,657	2,330	2,032	1,181
Schools toolkit	–	1,301	–	–
Accreditation schemes	–	710	–	–
Bad debts	(540)	1,782	–	1,985
Miscellaneous expenses	–	231	–	–
Subscriptions	247	249	284	274
(Profit) / loss on foreign exchange	85	62	96	–
TOTAL EXPENDITURE	103,394	363,160	353,710	334,370
(DEFICIT)/SURPLUS FOR THE YEAR	28,206	(5,729)	17,535	(5,585)

Information and Records Management Society

Provisional balance sheet as at 31 December 2020

	2020 £	2019 £	2018 £	2017 £
CURRENT ASSETS				
Trade debtors	3,014	1,296	6,076	–
Prepayments	40,651	20,537	22,541	895
VAT repayable	–	1,513	2,858	–
Cash at Bank and on Deposit	91,849	83,336	98,761	76,119
ASSETS	135,514	106,682	130,236	77,014
CURRENT LIABILITIES				
Creditors and accruals	6,843	5,114	49,836	13,772
Bank overdraft	–	–	–	807
VAT payable	–	–	–	316
Deferred Income	56,871	29,974	29,228	
LIABILITIES	62,612	61,985	79,810	44,123
NET CURRENT ASSETS	72,902	44,697	50,426	32,891
GENERAL FUND				
At 1 January 2019	44,697	50,426	32,891	38,476
(Deficit)/Surplus in the year	28,205	(5,729)	17,535	(5,585)
As at 31 December 2020	72,902	44,697	50,426	32,891



Despite not having to organise the quarterly weekend Executive committee strategy and planning weekends, this year remained a busy one.

My key activities revolve around two main projects. The first is to produce an Executive Committee handbook that has been written to help all Executive Committee volunteers, new and established, to manage and run their respective areas of the Society. It includes essential information on how the IRMS is governed, how to run the conference, running of the awards, membership structure, marketing of the Society, and many other helpful and motivational suggestions on all aspects of being part of the IRMS Team. A big thanks goes to Scott Sammons for producing so much of the content and other Exec members who have chipped in. There are a few areas to finish off, but it will be ready soon.

The second is being an active member of the Microsoft Customer Advisory Board (CAB) on Records Management. This CAB is made up from regulators, subject matter experts and the IRMS and the professional community. and has put the IRMS onto the world stage. A huge well done to Maria and Rob for driving this activity. The objectives of the CAB are to give feedback on design and implementation of records management features and to help ensure product alignment to customer context and prioritisation. We are already helping Microsoft to develop and prioritise their records management roadmap for 2021.

Apart from these projects, I spend a lot of time carrying out my business as usual (BAU) activities that include leading on data protection and, of course, looking after the Trustees and Executive. I am really looking forward to getting back to being able to organise our next planning weekend and seeing you all at the Conference in November.

Funny old year

It has been a tough year for everyone and getting used to new ways of working has been quite a challenge. I have attended most Executive meetings this year and hope to have added some value to the various discussions and initiatives being undertaken.

Corporate Membership

At the February 2020 face to face Executive meeting, we discussed how we could best promote the Society to attract more corporate membership. Because of the pandemic and the shift in corporate priorities, this has been placed on hold. We will rekindle this initiative once the economic scene starts to improve.

Supplier Relationship

Management Strategy

A meeting was held in London on 4 February with members of the supplier community who were committed to or had shown an interest in sponsoring the keenly awaited conference in May 2020.

The objective was to understand how we could increase the value of sponsorship by understanding what sponsors expect of the IRMS Conference and, from their input, create and market additional opportunities to them.

The session resulted in a comprehensive questionnaire that would be sent to conference registrants. Some of the statistical findings would be shared with sponsors to better inform them of expectations and trends, so they could ensure relevance in their content pre, during and post conference.

We also asked if there would be an appetite to engage in other events and initiatives, such as sponsorship of group events and participation in a supplier directory, if we were to create one. General feedback was positive and, as the lockdown eases, this is an initiative we have now revived.

Supplier Contract

Based on the Standard Terms and Conditions we developed last year, I have been involved in subsequent contract reviews.

The standard contract allows the IRMS greater visibility of contracted services and costs and makes it easier for us to manage SLAs, our and supplier commitments, and overall contract governance.

IRMS Bulletin

My involvement in this has involved creating and managing the distribution of the market review we carried out due to the current supplier contract coming to an end.

The responses were submitted to a selected team on the Exec to mark independently.



When all is said and done, Tribal scored top marks both technically and commercially and were thus awarded an initial 3-year contract with an option to extend for a further 2 years, thus ensuring the Society's flagship publication remains in good hands.

I would extend my thanks for the invaluable help of the Exec in bringing this to a successful conclusion and in particular Ed Irvine, Scott Sammons, Ren Leming and David Bowen.

Again, I remind you that 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.

Executive Meetings/Calls

The last face-to-face meeting was on 18/19 February in St Albans, where MKSAM kindly provided conference facilities at their head office – we were in lockdown soon after!

I have tried to attend the monthly meetings and other events when time permitted over the year. In fact, lockdown has made it harder to attend as people expect you to attend Teams meetings at work throughout the day as no one is out of the office travelling!

Exhibitions

None attended after February 2020

Commercial Officer

Ed Irving



Wake, Zoom, Sleep, Repeat...

Well, 2020, what a strange and challenging year for all of us.

As we've all had to adapt to new ways of living and working, it's been great to see the Society adapt so well, and to continue to operate effectively, providing valuable benefits to its membership.

A highlight for me this year is seeing how, despite the obvious challenges, the team have collaborated so effectively, and pivoted key annual events, such as the Annual General Meeting and Awards Ceremony to online events. Hats off to those involved – I continue to be astounded by the commitment and enthusiasm of my colleagues in enabling these changes.

I remain responsible for the management of the production of the Bulletin, the Society's thought leadership magazine and a key membership benefit. I would like to thank all those who have shared their valuable time to contribute articles. I am passionate about the positive contribution this provides for our members and am always looking forward to the next edition. Special thanks to our partners Tribal and Visual Print for their continued dedication and expertise in producing the Bulletin.

I had the pleasure of running the re-tender for editorial services for the Bulletin this year, with the current provider's term coming to an end. Following a competitive procurement exercise, it is with great confidence that this

was awarded to Tribal, who will continue to develop the Bulletin for the next 5 years. Thank you to Simon Ellis, Scott Sammons, Ren Leming and David Bowen for their support with this activity.

There are some fantastic supplier engagement initiatives underway that are helping shape the Society's commercial engagement model and relationships. I am looking forward to continuing to support Simon and the wider team with these activities across 2021.

Conference Director

Joe Chapman



As I write, it's February 2021, and just now I am often finding myself thinking back to this time last year – trying to recall how much we actually knew (as opposed to how much we could or should have known)... or maybe how much we wanted to believe.

What I do remember about the time just before COVID-19 is the anticipation I felt about the upcoming IRMS Conference, reflected in the annual report which I wrote back then but which was overtaken by events long before it went to print. In that report, I talked about how the Birmingham Conference was going to build on the success of the Celtic Manor event the year before, but also about some of the evolution and innovation I was hoping to bring, too.

The Conference being rescheduled means all of that still stands, and I'm sure will also mean that when we do finally gather, the learning and (socially distanced) networking opportunities will feel all the more special.

We have often been asked whether the conference will be going virtual – or indeed why it isn't. It is an option that we have considered on a few occasions, but there are a number of reasons why we have opted to maintain the Conference in its original format, which I hope don't make us appear unwilling to move with the times.

Firstly, the residential, 'all-under-one-roof' aspect is central to the identity of the IRMS Conference. We know that delegates and sponsors alike strongly appreciate the communal feel of the event, including the shared social experience of the evening events (and having been to other multi-day

conferences that didn't have our joined-up approach, I can see what they mean). It's a big part of what makes our conference stand out and makes people want to return year after year, and also makes the event such great value for the all-inclusive price.

Secondly, the Conference programme – planned far in advance and which persuaded many people to book their place – is packed. I don't know about you, but I've found a lot of online conferences and events – even those that have been well-organised using effective platforms – to be much more tiring and less engaging than they would have been in person, and that's with a fraction of the content that we have already lined up. Never mind the loss of the social aspect, moving the Conference would mean sacrificing or impairing a lot of that high-quality content.

Finally, I can't pretend that a move online wouldn't also have financial implications. The Society is not as dependent on its annual showpiece for balancing the books as it used to be – as the numbers in this report, for a year with no conference, will no doubt show – but effectively cancelling the (physical) event would have significant risks.

During an incredibly difficult year for the hospitality and events industries, the venue staff and the wonderful team at Revolution have both worked hard to put together a package of measures that mean we – and you – can be sure of a safe environment for the Conference when the time comes.

It's also not as if the IRMS hasn't adapted to life online, as other reports explain. So, here's to IRMS21, and let's hope life changes again just as much over the coming 12 months as it has done over the past year.



I wrote in an article in the July 2020 IRMS Bulletin that 'Winter/spring 2019/2020 has turned into the oddest and gloomiest time in living memory, with the COVID-19 coronavirus pandemic sweeping the globe, causing many hundreds of thousands of fatalities'. Ain't that the truth! And it only just seems to be getting very slightly better, thanks to the amazing work of scientists in developing vaccines.

But hasn't the year created some odd times for us too, as a Society, as a function trying to pull together a conference against adversity?

I was very excited last time I was penning this report that it was my contacts that had helped fill at least some of the speakers for the 2020 Conference. But, of course, that was deferred, and deferred again. We have had some very interesting conversations internally as to how and if we should continue with the Conference both in 2020 and 2021, and I think the discourse we've had each time have brought us to the correct conclusions – even if COVID-19 has had other ideas and caused us to delay again... and again.

What was to be the 2020 conference will happen. It may be a touch different, but it will happen when it is meant to happen, and we will be there, presumably most of us having had our jabs by then, supporting it, staffing it.

I was also very excited that for our next Conference, whenever that is now destined to happen, to be working with the Office of the National Data Guardian for Health and Social Care to arrange for **Dame Fiona Caldicott** to speak. It is with a lot of sadness, having worked professionally in the NHS for approaching 20 years, that I and we heard of her passing in February at the age of 80. She will be sorely missed in the world of Information Governance, both in and out of health and social care. I hope we can find someone to fill her spot, and do it and her justice. I am sure we will, and I offer her family my condolences.

I have also been involved with my colleague, **Roger Poole**, the Director of Professional Standards, in pulling together a schedule of "days" we should mark as a society, including, of course, International Data Protection (or is that Privacy Day). This is just in the final stages of being agreed, and has naturally created some very animated discussions as to what should and shouldn't be included!

Finally, and not directly related to my role with the IRMS, I was hugely proud to be bestowed with Fellowship of the Society at our virtual awards in November. I cannot thank the Society enough.



A huge amount has changed since January 2020, when I decided to put my name into the hat to volunteer as Digital Director. At the time, I was still catching planes and trains and holding face-to-face meetings on a regular basis. Even trying to imagine that that was a normal way of working is becoming increasingly difficult with each passing month. Certainly, the process of taking over the reins to the Digital Director position has been a very unusual process – as you might imagine, and at the time of writing I’ve only been able to ‘meet’ most of the other members of the Executive virtually.

The transition into an online world of video calls and chat has probably been a significant part of each of our years. We probably all hear phrases such as “you’re on mute” and “the new normal” on an almost daily basis. Certainly, this transition has been a significant change in the way that the IRMS provides services to our members. We’ve seen many of the presentations and events that our Groups put together being able to be run online instead. Attendance has rocketed – some of the events we’ve held over the past year have seen several hundred members and very lively online group chats.

With so many of our events being recorded, the past 12 months have also seen a significant growth in the IRMS YouTube

channel. With regular uploads and some high-quality content, we’ve seen the number of people viewing our content increase significantly. If you’ve not taken a look at the YouTube channel, I’d urge you to, as it’s packed with great content (and the more views we get, the more it was worth me spending the time trying to pick up the basics of video editing!).

From a personal perspective, I’ve most enjoyed helping Maria Lim launch our Customer Advisory Board with Microsoft. This initiative has allowed the IRMS to facilitate a direct conversation between some of the world’s major national archival regulatory authorities and Microsoft’s compliance specialists in Redmond. We are aiming to influence Microsoft 365’s future direction, so that the retention capabilities it provides can be used as the basis of a more complete records management solution.

Our other major digital focus in 2021 has been to prepare for our own move into Microsoft 365. While this process has been delayed by the transition of the IRMS into a registered charity, it hasn’t stopped us from putting the plans together. I’ve been busy defining a society-wide architecture, which should put us in a great position once we get the green light to start the migration.

All in all it’s been a busy first year, I’m just looking forward to actually getting to meet some of the people I’ve been getting to know on e-mails and calls – and perhaps even get to share a drink or three.

Digital & Training Officer

Penny Wright



This was my first full year in the Digital and Training Officer role, working with the Digital and Training Directors. Rob Bath is the new Digital Director, replacing Neil Reeve who stepped down last year, and Sarah Norman is the Training Director until May. All three of them have been brilliant to work with, supportive and generous with both their time and knowledge. Rob is currently taking the IRMS team through the transition to 365, among other projects.

This year has not been the year anyone was expecting, of course, due to the pandemic, and like many people I have been working from home and juggling family responsibilities. The IRMS team has a great ethos of health, family and job first, and everyone is mindful of the unpredictable times we're in.

One of the biggest changes was the switch from in-person events to online. While there are obvious downsides to the lack of meeting people, a silver lining has been that these events are now much more accessible to members who would otherwise not have been able to participate. Livestorm was introduced as a platform around the start of lockdown by the outgoing Chair and Digital Director and it became an essential tool for keeping IRMS events going. The Conference unfortunately was postponed (Twice! Big shout out to the Conference team

who handled this so smoothly), but we did manage to hold the IRMS Awards night in November, and there has been a monthly Pub Quiz at the 'IRMS Arms'.

One of the exciting new projects to happen in this year is the IRMS Microsoft 365 Customer Advisory Board, which came out of a very successful IRMS Roundtable event. Maria Lim (Scotland Group Chair), Rob Bath (Digital Director) and Reynold Leming (Chair) took the momentum and set the group up quickly. The group is formed of Information, Records and Archives professionals from around the world who work with Microsoft consultants to discuss features of MS 365 that are particularly relevant to our profession.

In the coming year, we will be working to improve knowledge sharing around our Content Management System, Your Membership, which we use to publish the website. The IRMS team members are all volunteers, and sometimes we get temporarily stumped by a problem that has been solved before by a member of the team who has moved on or is now in a different role. This will be particularly relevant for me because in May at the AGM I will be taking over from Sarah Norman as Training Director, which will be an exciting new challenge. This means there will be a vacancy for a new Digital and Training Officer on the Executive – maybe you should think about applying!

Groups Director

Suzy Taylor



Well, 2020 was certainly an exciting year for our Regional and Special Interest Groups. Pre-lockdown, Group Chairs were able to put on some well-attended face-to-face events and then when we were all confined to our homes, our events delivery had to change. With the help of our online platform, Livestorm, the Group Chairs were able to arrange events at short notice, enabling us to hold more regular events and bring together group members from all over the UK and Ireland, eventually attracting attendees and speakers from across the globe.

In some ways, the Group Chairs have been busier than ever, and I'd like to thank them for their hard work and imagination. It's not been easy, but each event we've organised has been in direct service to our members, which makes being a Group Chair one of the most rewarding jobs in the IRMS, in my humble opinion.

I'd also like to thank everyone who participated in these events, from speakers, to group secretaries, committee members and anyone who has provided a physical venue for us.

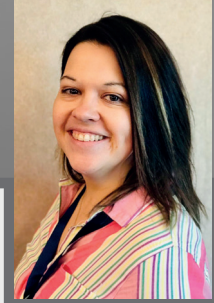
It has to be noted that Livestorm has proved such a success that Regional and Special Interest Group events may never be the same again! But we will move back towards face

to face events gradually, ensuring we keep a nice mix of delivery methods.

Some groups had to go into a hiatus for 2020, and these included Wales, Legal and South West. We are looking for chairs for these groups and so, if you are interested, please get in touch. Please continue to sign up for our webinars and hopefully some face-to-face events in 2021, and we'll see you there!

Marketing Director

Laura Stockwell



This past year has been one we will not forget. It has presented itself with a number of ups and downs, but, despite all of this, we have continued to progress our work in the Society.

We have all had to find new ways of working and living over the last year, and a huge benefit to us all has been the use of technology and being able to utilise the virtual platforms to interact with others.

The virtual world has opened many more opportunities to us, and we have been able to interact with more people, at any one time, in a variety of locations than we ever would have before.

The events we would normally have exhibited at were unable to go ahead, so we had to find other ways to promote the Society. We utilised our time being indoors and moved our events online and got involved with some great webinars with companies, such as Iron Mountain, Laserfiche and Hadageto. We also have upcoming virtual events that the Society will be involved with, such as the Cyber Conference, and some more in the pipeline.

We have completed a search engine optimisation (SEO) audit to ensure our website is being optimised to its full potential and made improvements where necessary. It was positive to see that our website was being optimised well, and only a few amendments were needed.

Increasing our member numbers is a key focus of the marketing strategy, and therefore, I have been mapping out our membership sectors and offerings. The

results from these will highlight the areas we need to focus on to increase our member numbers and also identify other areas that we are missing for our current members.

Melissa Kennedy, our Communications Officer, has really done some great work this year since joining the team, including the monthly Twitter hours and the monthly newsletter. Thank you for all your hard work.

I have enjoyed my time being involved with the Society and I would like to thank everyone on the Executive, Group Chairs and the IRMS members who I have worked with throughout my term as Marketing Director. It has been a pleasure being part of the team and I wish you all the very best.

I am just finishing up my first year as the IRMS's Communications Officer and I can hardly believe it's been that long. Everyone has been incredibly welcoming and helpful this year and I definitely feel part of the IRMS team. It is a bit odd not being able to meet anyone in person, but I do get to work with everyone virtually and I always get to know what's going on. Getting to know everyone's news and helping to share that is definitely one of the best things about this job!

One of my roles is keeping the Society's website <www.irms.org.uk> up to date with news and events, and although we share information on social media, the website is still one of the best places to find out what's going on. I've taken on responsibility for sending out our monthly newsletter "Off the Record" and contributing to the bimonthly magazine The Bulletin, and you can find archived editions of the latter on our website <<https://irms.org.uk/page/Bulletin>>. I also help keep our LinkedIn group <www.linkedin.com/groups/1814724> and Twitter feed <www.twitter.com/irmsociety> updated, so if you don't follow us on either yet, you should do so now.

One of my duties is organising the IRMS's monthly 'Twitter Hour', which takes place from 8:00–9:00pm on the first Wednesday of each month and we discuss – via Twitter – an information or records-related topic. We talk

about something new every month and a different guest host leads the chat. 2020 was a year of amazing discussions! Just a small sample were:

- IG in a COVID Climate: Remote working challenges and opportunities
- Microsoft 365: Love it or hate it
- Why isn't records management sexy to anyone but us?
- GDPR 2 years later: What is the role of the DPO?

These conversations continue long after the evening ends, and I encourage you to go back to them now by searching #IRMSHour. There's always more to say and the conversation can go on forever!

Thanks again to everyone who has helped me in my first year, and I look forward to my work with the IRMS that's yet to come!

Membership Director

Katharine Stevenson



Much of my day-to-day role involved supporting IRMS members with general queries on their membership. To the Executive, I provide membership statistics through monthly reports, so we can track trends on membership rates. Despite obvious challenges, 2020 remained a successful year for membership numbers, and this is all down to the collective effort of everyone in the Executive, 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.

Of particular note is that due to the impact of COVID-19 forcing all of our usual group events online, a number of Group Chairs made extra efforts to hold even more events than otherwise could have. The Pub Quiz and Twitter Hour continued momentum to keep our society connected. Huge thanks to those members who gave up their time to run and attend these events. No doubt, it has helped to not only retain members, but encourage new members to join.

Last year, I ran the first leavers surveys for a few years, which provided some helpful insight and led to a couple of members rejoining. Another survey will be launched in early 2021. While the impact of COVID-19 does not appear to have impacted

membership levels detrimentally, we remain aware that both personal and corporate budgets will be tight for the coming years.

The main programme of work that I continue to pursue since joining the Exec has been on our “Equality, Diversity and Inclusion” agenda. Last year, we published our Diversity and Inclusion Statement on our website. A new online Diversity and Inclusion forum was also launched on our Website. I also held a couple of online Diversity discussions with Iram Ditta and Maria Concesa Lim, which were well attended and generated great discussion. In October, we launched our Equality, Diversity and Inclusion survey to help us better understand our membership demographic and key themes. As a result of the survey results, an IRMS Equality, Diversity and Inclusion Strategy is being written and I hope to hand this over at the end of my tenureship this May.

I’d like to thank everyone on the Executive, Group Chairs and other IRMS members I’ve worked with over the last couple of years. It’s a great team to work with and I wish continued success for the Society.



A challenging year for the Executive, IRMS members and everyone else! As a member of the Executive, I have contributed to the overall development and improvements, as defined in the work programme by attending the regular, monthly, Executive conference calls. It was very disappointing that, due to COVID-19, we had to postpone our annual Conference.

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 introduced an additional vendor to the IRMS Bulletin and attended a number of calls with the vendor and Revolution Events.

Executive Meetings

I have attended almost all monthly Exec meetings/calls and made a contribution to the discussions and idea gathering. In particular, I have made a number of suggestions regarding various initiatives to enhance our services etc to the IRMS membership.

Executive Initiatives

The following are initiatives for which I have either led or contributed to:

1. Determining (with consultation) a list of "Days" which it would be appropriate for the IRMS to promote. I am also working on a proposed approach due the significant diversity in the types of "Days". Andrew Harvey has shared this workload with me.
2. Reviewing and providing input to the new draft Standard Terms and Conditions for contracts entered into by the IRMS.
3. I have joined the IRMS Accreditation Panel and am looking forward to interviewing Accreditation Candidates in the (very) near future.
4. I am developing a Horizon Scanning process to help IRMS members be prepared for new regulation laws relating to Information Management.
5. Participated in meetings relating to the Draft National Data Strategy.

6. I arranged for the IRMS Membership to be aware of the new proposed British Standard (BS10025) by having a notice included in "Off the Record". This notice also included a link, providing our members with the opportunity to provide feedback for consideration prior to the standard being finalised and published.

7. Twitter Hour – I have participated in a number of these.

8. Vendor contracts reviews,

9. Developed and published a "Code of Conduct" for the Executive and those representing the IRMS,

Groups – Independent Consultants

Due to continuing challenges around feedback and membership, it was agreed that this Group would not continue in its existing form. It was noted that many of those who "signed up" for this group are members of alternative groups within the IRMS and will continue to benefit from these groups.

Groups – Financial Services Records Management Forum (FSRMF)

Predominantly as a result of COVID-19 (most members prefer face-to-face meetings) and significant work pressures on our regular attendees in respect of regulation, we have not held any meetings this year. A proposed meeting in December was postponed due to attendance challenges. However, we do anticipate holding a virtual meeting in the first quarter of 2021 and have engaged with two vendors to present. We are also extending invitations to those employed by regulated industries/professions, such as pharma, tobacco and energy.

British Standards Institution (BSI)

IDT/001 Document Management

Applications:

Attended meetings reviewing the relevant standard.

IDT/002 Archives/Records Management:

Attended meetings reviewing the relevant standard.

International Standards Organisation (ISO)

I attended a week of online (Zoom, of course!) meetings in May 2020. These meetings all related to ISO Records Management Standards/Technical Reports and Ad Hoc (work) Groups (AHG's)

Relating to ISO/TC 46/SC 11/AHG2, I am fully participating in reviewing the need for greater clarification/standardisation relating to Disposition when referenced in ISO Standards. This requires the review of a number of existing ISO Standards/technical reports etc to determine how disposition is dealt with.

Training Director

Sarah Norman



Well what a year it's been. A year ago, I wasn't expecting us to still be in the middle of a COVID-19 pandemic. It's been a tough year for all of us – I hope you've found the IRMS to be an engaging and supportive respite during this challenging time.

COVID-19 derailed a few of the items I was planning to deliver this year – especially AIIM discounts. Their team was understandably under-resourced and we weren't able to get the agreements finalised.

However, online learning has been a key feature this year – we've partnered with **Emily Overton** (RM Girl) to deliver training discounts on her podcasts and are in the middle of discussions to be a Partner in delivering the international Certified Information Governance Office (CIGO) training to our members. I hope by the time you are reading this an agreement will be in the finishing stages.

The podcasts have also gone from strength to strength this year (a huge thank you to **James Lappin** for his continued hard work on delivering these). We also have a waiting list of Mentees to be allocated Mentors – so my annual plea to our more experienced Mentors to consider giving some of your time to provide guidance and support to the Mentees. Feedback from the pairings so far has shown that both Mentor and Mentee benefit hugely.

What else has crossed my plate this year? I've been part of the Awards and Accreditation

Sub Committees where we've still managed to run both processes with a rather seamless switch to collaborating a lot via virtual platform. I've also been the Executive's representative in a great initiative by **Barry Moulton** to establish a formal Data Protection Apprenticeship pathway. His enthusiasm for this has been awe-inspiring.

Having been elected to become the Marketing Director, this is my last report as Training Director – after 4 years at the helm, it's time for me to pass on the mantle. Penny, our current Digital and Training Officer, is taking over the reins and I know she'll do a fantastic job and continue to help make the training offer one of the key member benefits. A huge thank you from me to all our Training Partners, and all you reading this – it's been a real privilege to be the Training Director and hopefully I leave the offering in good shape.

Accreditation Annual Report 2020

Scott Sammons, Chair of the Accreditation & Fellowship Development Sub-Committee

2020 has been a period of change and development for Accreditation within the IRMS. Due to Lockdown 1.0, Rachael Maguire had to step away from her Accreditation lead role and I volunteered (as I was about to leave the Executive and have some 'spare time' to help out) to ensure things kept going. Since that time, we have worked to overhaul and get Accreditation ready for the next level in its journey. While I don't have the space here to detail all our work during 2020, this can be categorised into the following 'streams':

1. Recruitment of new volunteers. In terms of both assessors to progress applications and volunteers for the development sub-committee, we now have increased numbers on both from a wide range of backgrounds.
2. Improved resourcing & processes. We have relied on the good faith and the spare time of a very small number of volunteers in the past to run Accreditation. This has meant that, while they do what they can, some applications and records fall short of what we need Accreditation to do. Utilising the hours we have contracted with MKSAM, and approaching resourcing from a new perspective, we have now changed this and have cleared a backlog of data and applications to bring Accreditation operations up to date.
3. Revised forward plan & strategy. Following on from discussions with our new volunteers and external stakeholders, the Sub-Committee has a work plan and strategy for the coming year to refresh Accreditation, explore options for 'charging' and other things like sector-specific projects, CPD & re-accreditation.

We still have some work to do around data quality and revising current processes, but we are now well underway on all fronts and, with a good wind on our back, 2021 should be very productive and positive indeed.

My thanks goes to our volunteer assessors, Debra at MKSAM and our new committee members (Sarah Norman, Barry Moul, David Smith, Sophie Philipson, Paul Welch, Deirdre Allison and Reynold Leming) for their support and input in getting the wheels of Accreditation turning once more. My thanks also go to Rachel Macguire for her work at the beginning of the year to help get this underway.

You can find out more about Accreditation on the website at <www.irms.org.uk/accreditation> and find out more about the work of the Sub-Committee at <www.irms.org.uk/accreditationSC>.

The 2020 Awards process started off well in the early part of 2020, but like other areas of the Society, faced new challenges with lockdown and the national pandemic, including the postponement of the annual Conference. However, with the support of the Panel volunteers and others, we were able to rise to the challenge and deliver a ‘virtual ceremony’ hosted by myself and Scott Sammons in November 2020. You can view the recording of that evening on the IRMS’s YouTube account and also see the outcomes of all categories at <www.irms.org.uk/awards2020>.

The 2021 Awards are very much underway and with our new Awards Panel volunteers (see <www.irms.org.uk/awardspanel> for the full list) we are looking forward to not only running a positive 2021 programme, but also to start work on reviewing the awards process and criteria for 2022 onwards. To find out more about the 2021 Awards programme, visit <www.irms.org.uk/awards2021> to keep an eye out for details of nominees, the members’ vote for a winner in certain categories, and the winners later on in the year.

My thanks go to **Scott Sammons, Roger Poole, David Paris, and Neil Reeves** who were on the panel until May 2020. Their work over the last couple of years has got the awards to where they are today, work which we hope to build on to grow our awards to even higher heights than they are today.

During 2020 IRMS Ireland Group Committee developed seminar programme agendas and exchanged ideas on how to best progress issues. Due to the pandemic restrictions there were no face-to-face events held. Whilst overall the pandemic impacted significantly on our networking, group members enjoyed the IRMS Arms Pub Quiz events, which provided good opportunities to engage with fellow RM professionals.

In March, we intended to participate in a “Public Symposium on the Importance of Preserving our Archives for Future Generations”, organised by one of our members, **Niamh McDonnell** (National Archives), which had to be cancelled due to the pandemic. We consider this an important event for our membership, leading to greater emphasis on the need for records management professionals in Ireland. Our annual training event with the Archives & Records Association (ARA), Ireland, scheduled for June also had to be cancelled for the same reason.

On 9 July, we hosted a webinar “Microsoft 365 – Approaches to Classification” with Robert Bath as our guest speaker. This event was well attended and good interaction between Rob and attendees contributed to a successful and informative webinar. The webinar is now available via the IRMS YouTube Channel.

On 8 October, we hosted an online event, looking at the history of IRMS Ireland. Outcomes included ideas for future webinars on “Data Privacy during the Pandemic” and a presentation on IRMS Accreditation to be given by our Committee Members. IRMS Chair Reynold Leming joined the panel discussion and gave an informative update on IRMS activities.

On request from the ARA, Ireland, the IRMS Ireland Committee reviewed the draft ARA 2020 Skills Survey form and provided feedback. Our members were invited to participate in the finalised survey.

Due to the pandemic, our IRMS Ireland Group AGM was not held for 2020, so we are continuing with our existing committee members and roles.

We held our last face to face session ‘EDRMS A–Z’ in London in February 2020. We had a great list of speakers and were only able to accommodate 30 people – there were twice that number of members wanting a ticket!

2020 was a huge turning point for the entire world, not just IRMS London. I went into lockdown long before the rest of the UK did due to personal health reasons. In doing so, I moved us online and started the IRMS London weekly ‘Webinars on Wednesday’ or #IRMSWOW, in which we would all meet at 6:30–8:00pm with one speaker holding the floor to really dive deep into topics. We ran from February to July every week. I think in the end we held around 16–20 online events during that time.

After a break, we held another meeting in October, and Scott Sammons sat in as Chair and held a meeting with **Lee Gilbank** (the “Information Security version of Tim Turner”); a fabulous event it was too.

I feel moving our groups online was one of the best things that the IRMS did during 2020, as it set us apart from many other memberships for the same price. #IRMSWOW recordings can still be found on the IRMS YouTube page!

I ended 2020 wondering what 2021 would bring and decided I needed to head in the direction of Information Rights. I decided to step down as IRMS London Chair and I’m on the lookout for my successor, as I move to launch the new Information Rights Group. I hope to see some of IRMS London regulars attending my new meetings and wish IRMS London the very best of luck, as I shall hold it as one of the best things I have done in my IRMS volunteering capacity.

Events

Due to the pandemic, our online events allowed us to reach more of our members compared with previous face to face events. New members mentioned that the benefits they got from the events more than justified the membership fee.

We have also opened these events to members and non-members and latterly I have noted registrations from countries outside the UK.

We held eight events in total, with topics ranging from Communication Skills, Implementation of RM tools in HES, Microsoft 365 features and RM capability and more general RM implementation Journeys. We averaged 86 attendees across these events.

Speakers have included Alison North, Claire Johnson, Vivek Byatt, Ryan Kerr, Claire Boyle, Shona Dunning, Heather Jack and Tony Nunn. Thanks to all those people who helped these events go well.

Scottish Rain

We have managed to publish two issues, in February and June 2020.

Coffee Mornings

These have provided me with a live feedback mechanism from members, as well as offering a chance for the members to have a social chat.

Membership

I have had feedback to say group members feel that they are getting so much more now from the IRMS. The Scottish Council for Archives has also met up with IRMS Scotland and the IRMS Executive to express their wish to work more closely together.

The Future

You may know that I am preparing to transition to a new role as Chair of the new Information Management Technology group, and I am delighted that **Ryan Kerr** has agreed to take on the role for Scotland. I give Ryan a warm welcome and we have plenty of events scheduled for IRMS Scotland, so as the incoming Chair he will not get daunted with planning new activities!

IRMS Midlands Group

Emily Gresham

Plans for a face-to-face event in March were unfortunately cast aside as we responded to the COVID-19 pandemic. Fortunately, we were able to take our events online and share the knowledge of our speakers with a much wider audience than would have otherwise been possible.

Our webinars included a topical presentation from Simon Alle, who engaged with attendees to measure the disruption caused by COVID-19 and its impact on Information Governance. We also looked to the future of records management with James Lappin and considered how we might start to use AI and machine learning to manage information. Finally, we had some much needed practical advice from Rachael Maguire regarding understanding and using case law when handling information rights requests.

I'd like to thank all those who supported the group this year, our speakers, attendees and special thanks to **Colin Sawers**, our Group Secretary for all his hard work.

2021 will be a quiet year for the Midlands Group, as I will be taking a sabbatical until Spring 2022 while I am on maternity leave. There are therefore no events planned for 2021. Midlands members may get in touch at <midlands@irms.org.uk> with any proposals or suggestions for events in 2022.

Third Sector Group

Gary Shipsey

The Third Sector has been particularly hard hit by COVID-19, with the cancellation of large fundraising events dramatically reducing income, whilst, at the same time, an often increased demand for their services. The Group ran an online session in October focused on COVID-19 and data governance. The session looked at the data and privacy implications of the increasing shift to using social media for fundraising; home-working tips; how to handle supplier breaches in light of the Blackbaud breach and health questionnaires. The Group is continuing to develop and find new, engaging ways to best support charities in 2021.

IRMS Property Group

Jamie McDonald

2020 was a tough year for us all and unfortunately like many groups the Property Group had to cancel its in person meetings that we had planned. However, we are looking to bounce back in 2021 with at least two virtual meetings, including our popular round-table discussions and hopefully (regulations permitting) an in-person meeting later in the year.

Our themes this year with regards to meeting discussion points and presentations will be Information Governance and The Management of Property Records in a Digital Environment.

Our first meeting "Maintaining an Information Governance Hub" was held in March.

I look forward to seeing you virtually or (hopefully in person) at some point during 2021!

IRMS North would like to thank each and every speaker and attendee who played a role in the online event programme for the IRMS during 2020, which was an incredibly challenging year. It was also my first year as IRMS North Chair, a challenging feat in the face of a global pandemic. Nevertheless, we took to Livestorm to deliver a series of webinar sessions which proved quite a hit. We saw attendees join us from across the globe to cover topics from Information Governance and Electronic Records Management to Evidential Weight & Legal Admissibility of Electronic Information and International Data Transfers.

We were delighted to provide the opportunity to a small group of IRMS Members to take part in a day's online Auditing Data Protection Compliance course, which was delivered by TKM Consulting in conjunction with For Your Information. We would like to thank Liz Taylor, Heather Jack and Frank Rankin for their time.

We at the IRMS are passionate about Equality, Diversity and Inclusion. IRMS North together with our Membership Director, Katharine Stevenson, delivered two events. The first focused on Diversity and Inclusion within the Information and Records Management Sector – which included an introduction to what it means to be inclusive and diverse. Special thanks to our guest

speakers, **Harold Brako**, finance litigation and disputes partner at international law firm Addleshaw Goddard and IRMS Scotland Chair, Maria Concesa Lim for sharing their personal stories.

The second event was a call to action with a focus on transparency and greater inclusion.

This thought-provoking session was led by Maria Concesa Lim.

Watch out for this year's event schedule, we plan to mix things up with webinars on more topical issues as well as some fun informal online networking sessions. [Elizabeth Barber](#)

Public Sector Group

Elizabeth Barber

2020 was a year of many parts for Public Sector Group (PSG). We had to cancel our March event, which was due to be held before the first national lockdown, but we were able to move online in May. We reprised all the speakers we had invited to speak in March and many more over the course of the year. There were advantages to us in moving online, as it has meant that we have been able to reach out to members from across the UK and internationally who are not usually able to travel to our in-person events and accommodate many more delegates. The move online has also meant that our members can choose the content they want to access in shorter sessions without needing to be away from work.

Before we had to suspend in-person events, we were struggling with our delegates being able to justify a whole day out of the office to be at the event. We have moved our 2021 programme entirely on-line, so that we can plan with some certainty, and we will review the approach at the end of 2021 to make a decision about how to manage the 2022 programme. We understand that our delegates have enjoyed the content of the sessions, but have missed the networking opportunities.

Moving forward, I expect PSG events to be a mix of in-person and online events, especially given that there will be financial pressures in the public sector which will make travel more difficult. We will be consulting with our members about this in the latter part of 2021. I would like to say a huge thank you to Sarah Graham for all her work with Livestorm, as without all this additional work we would not have been able to get online so quickly and effectively.

Schools Group

John Walk

It has been a pleasure to be the Chair of the Schools Group within the IRMS in a role I took up in June 2020.

The Schools Group has had success and attracted interest and engagement. However, COVID-19 has curtailed the proposed review of the IRMS School Toolkit, work which will need to be rescheduled and planned as COVID-19 restrictions hopefully ease, and schools and members of the group have more

time to pay direct attention to the review.

My sincere thanks go to IRMS officers who have been so helpful, and in particular to mention Elizabeth Barber, who has been an invaluable support.

Plans for the Schools Group post-Easter 2021 will be to secure regular monthly meeting slots to undertake elements of review of the Toolkit as required. This will enable greater engagement at a time when there can be a more focused approach.

The Toolkit review will focus on breaking the material down into a more factsheet type approach. The current Toolkit is a great resource and having everything in one document has its attractions. The aim is to make future revisions simpler, and to provide a more digestible format for schools to download relevant sections. Being able to revise sections hopefully will lead to a more dynamic approach.

Having the Schools Toolkit in the more modular form will also enable it to fit alongside more IRMS-wide developments of specific topics, for example, GDPR.

As part of the review, a speaker programme will be considered, along with joint working with other IRMS special interest groups. I am looking forward to my own personal development, alongside expanding knowledge of the school and academies community.

Like everyone, I look forward to a return to times when COVID-19 does not dominate every aspect of our lives.

Financial Services Group

Roger Poole

2020/2021 has been an interesting, busy and challenging period for the Financial Services Group/ Financial Services Records Management Forum (FSRMF). COVID-19 has delivered a number of challenges, including, of course, our inability to hold physical meetings. Our members do prefer these types of meetings, as they are more conducive to problem sharing and information gathering.

That said, we did plan to have an online meeting in December, but, unfortunately, it did not proceed. We are planning an online meeting in the first quarter of 2021.

However, the good news is that we did have a meeting just before Lockdown 1!

The meeting in March 2020 was held in the City of London and was attended by approximately 20 people. Most of these were from financial institutions based in London.

A "Major Bank" which has implemented a solution from Automated Intelligence gave an excellent presentation. The Bank is able to demonstrate significant cost savings whilst also significantly reducing risk.

Automated Intelligence then expanded upon their technology solutions for reducing risk and costs relating to Records and Data.

Subsequently everyone in attendance discussed current Records Management/Data related challenges. All who attended were very positive regarding the meeting content.

We would welcome new ideas for our group to explore and to benefit our membership and look forward to 2021 – post COVID-19 (I hope).

