



Annual Report & Accounts 2021

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 2021. It also includes the Society's Annual Accounts for the calendar year of 2021.

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 second 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 and records.

All the best,



Reynold Leming AMIRMS, FIRMS, Chair

Chair

This is my second annual report as Chair; 2021 was another challenging year with COVID-19, however there are many highlights for the Society, including holding our 'in person' Conference in Birmingham, which I will cover below.

Conference: After a number of postponements, we were finally able to hold the Conference at the end of November 2021 – and what a great event it was! **Joe Chapman**, our Conference Director, should be really, really proud of what he and the Revolution Events Ltd and AV team, Complete Production Solutions, pulled together. I would like to say a huge thanks to all speakers, delegates, exhibitors, sponsors, organisers and the IRMS voluntary team.

There was a great buzz to Conference, excellent content, a lot of fun at the social events, a very memorable vendor showcase, the chance to catch up with people and the pleasure of making new acquaintances. As ever, it is always great that a significant part of the speaking content is sourced from our membership sharing their insights and experiences.

One of the highlights of the annual Conference is the Awards Ceremony, which I co-hosted with the very talented **Ben Hanlin**, who delivered a spell-binding magic show afterwards. My big congratulations to all the nominees and winners.

Microsoft CAB: The work continues in the Microsoft Customer Advisory Board. The intention of this Board, and the supporting Working Group, has been to help influence the direction of the records management capabilities provided within the Microsoft 365 platform. It has been facilitating a conversation between Microsoft, the memberships of the IRMS and other professional bodies, end-user organisations,



leading subject matter experts and multiple national archival bodies around the world. We are delighted with the outcomes already realised; two major outcomes (of several) include Adaptive Scopes and Multi-Stage Disposition Review. A current key focus is information governance aspects around the capture of MS Teams chat records.

My huge thanks to **Maria Lim**, the Chair of our Information Management Technology Group, and other colleagues for all their work in this. The IM Tech Group has also been holding events around other topics, including e-mail, chat records and digital preservation.

Charity status: The Society has of course successfully become a Company Limited by Guarantee on our transition to subsequently gaining Charity status. Alas, at the time of writing, the Charities Commission has further rejected our application; we need to again update our Constitution to embed our charitable purposes. This will involve revisiting our overall Mission Statement, the continued provision of free resources and public events, updating aspects of our website and policies, and the continuation of our advocacy work for both the profession and value of information and records management for society as a whole. My ongoing thanks particularly to our Treasurer, **David Bowen**, for his work on this.

Advocacy: We have been working with other organisations in the sector to raise the profile of our profession and discipline. This includes, for example, the work we are doing to promote relevant apprenticeships, actively engaging with the education community and responding to consultations such as that on the future of Data Protection in the UK.

Also, the Information and Records Management Society and the Archives and Records Association have come together to launch **"Democracy and Rights in the**

Digital Age – the Campaign for Records".

Without significant investment, innovation and enforcement in the collection, preservation and discovery of records, the age of dis- and mis-information will continue. Accusations of 'fake-news', conspiracies and cover-ups will abound and trust in government and democracy will be further undermined.

Fundamentally there needs to be proper investment in the profession and its work. Investment which will ensure that all records across the public sector (and its partners and contractors) provide the essential evidence the public need to rebuild trust in government and diminish the threat to representative democracy. Gaps in regulation will also need to be addressed in the longer term. These include the new paradigms created by digital records and social media, which were not envisaged when legislation was framed.

Member offerings: We are delighted that **Shona Dunning** has rejoined the Executive as Content Officer and is doing a root and branch review of our published **content resources**.

As part of our content strategy, we are working on developing a **Toolkit for M365**. This will include high-level guidance and a curated "best of the web" for all aspects of information governance and records management within the platform.

We have long-standing relationships with our training partners. Led by our Training Director, **Penny Wright**, we are currently defining a survey on identifying the training needs and wishes of the membership. The outcome of this will be to help us expand the training relationships to ensure that all such needs can hopefully be met, whether

these relate to direct professional knowledge or soft skills.

Complementary to this is the **Workforce Mapping survey** that we are involved in with CILIP, ARA, TNA and other partners. A key part of this will be understanding what the sector needs in terms of skills and competencies, support, and resources.

We are continuing to build our **Digital Preservation** offering, led by our Vice Chair, **Jaana Pinnick**. This includes the very well received training programme on Digital Preservation that is being conducted by Preservica. Jaana is also working on the co-ordination of our overall workforce skills and development agenda.

Our geographic and special interest **Groups**, managed by Groups Director, **Suzy Taylor**, and Groups and Volunteers Officer, **Neil Reeves**, continue to work hard in conjunction with our fantastic **Group Chairs** in providing events. Indeed, I enjoyed attending an in-person event on the Isle of Man recently.

We are doing a root and branch review of our **member engagement processes**, including digital aspects, led by our Digital and Training Officer, **Leanne Robertson**, and our Membership Director, **Heather Jack**. Leanne has also been working on revamping the Jobs Board.

Led by our Commercial Director, **Simon Ellis**, the Society is working on defining a comprehensive **Supplier Directory** for the sector and associated beneficial offerings to members from vendors.

Our Professional Standards Director, **Roger Poole**, continues to ensure that we are closely engaged with the development of British and International **Standards** relating to information and records management.

My thanks to all colleagues above.

The **Bulletin** has continued as a fantastic publication throughout COVID-19; my thanks to Commercial Development Officer, **Ed Irving**, in ongoing Bulletin production, working in conjunction with **Tribal** and **Visual Print**.

Our **Accreditation** programme continues apace, with growing industry recognition, and I want to give thanks to **Scott Sammons** who leads this portfolio, and the rest of the Accreditation Committee, for all their work.

I also say thanks to all members of our **Awards Committee**.

Operations: In communicating what we do and gaining new members to join our vibrant community, I want to thank our Communications Officer, **Angela Carbasu**, and our Marketing Director, **Sarah Norman-Clarke**, for their efforts.

In terms of our governance and digital operations, my thanks to our Secretary, **David Reeve**, our Data Governance Officer, **Andrew Harvey**, our Digital Director, **Rob Bath**, and our Data Management Officer, **Claire Boyle** for their hard work on business as usual, various projects and continued improvement. I also would like to say a big thanks for the great support provided by **Moore Kingston Smith Association Management**.

Ed, Sarah, Angela and Andrew sadly leave the Executive and we thank them all for their contribution and work.

I end with my very best wishes to all and look forward to catching up in person with many of you at the 2022 Conference in Glasgow. In the interim, please all keep safe and well.

Vice Chair

Jaana Pinnick



This was my second year as the Society's Vice Chair, and unlike last year, I actually got the opportunity to attend the IRMS Conference and represent the Executive as a Trustee in person, as we gathered in Birmingham in November. It was great to see so many new faces and to talk to all our sponsors and exhibitors, not to mention meeting all the 'old' friends again. After most of our work since March 2020 being done mostly in isolation, it was a refreshing return of near-normality, and I am sure all of you will join me in commending our Conference Director and the Revolution Team for their admirable resilience when they had to re-organise this event not once but twice.

In January 2021, our new Digital Preservation Special Interest Group took off, following our call for interest on the World Digital Preservation Day in November 2020. The group chair, **Linda Shave**, and I had a few meetings with members, canvassing their interest in the field, and we discovered our shared expertise varies widely from novice to expert. To encourage digital preservation 'newbies' to participate in discussions, we had the idea to offer our members a three-part webinar series entitled "IRMS Fundamentals of Digital Preservation", which we ran from April to September 2021. The series covered topics such as the five steps in the life cycle of a record, an overview of the terminology, and how to embark on a digital preservation project at your organisation. If you missed the webinar series, the materials are still available to members on the IRMS website.

In May, Linda had to step down as the group chair for personal reasons, and I took on chairing of the group for the duration of the year. **Suzy Taylor**, our Groups Director, and I agreed on a digital preservation strategy to take us to the end of 2021 when we put out a call for a new chair. At the time of writing this, no candidate has come forward, so it looks like the group will remain dormant – unfortunately, my many work commitments mean I will not be available to continue to chair it. If you have an interest in – or a passion for! – digital preservation, this is a great opportunity for you to coordinate IRMS activities and networking in the field. To find out more, contact either myself or Suzy Taylor.

Another preservation related resource we are proud to offer to you is Preservica's "Practical Digital Preservation Training & Education Series" offered to the members of IRMS and ARA – over 250 delegates signed up for the course, so there is definitely great demand for these skills within the membership. **Dr David Reeve**, IRMS Secretary, and I will also be participating in the iPres 2022 Conference in Glasgow this September, so do look us up at the IRMS stall if you are there!

Our Content Officer, **Shona Dunning**, and I have started to coordinate a project around IRMS History; this remains work in progress as we are reviewing our 'corporate archives' and ensuring ongoing capture of our materials to make best use of them. We are engaging with ex-Executives and members to source more information and to generate ideas for how we can take this forward. Again, if this is something you are interested in and you have some great ideas for us to realise, please get in touch! My big thanks go to past IRMS Chairs and to Linda Shave who have contributed to our data collection.

IRMS Trustees have had discussions around initiating work on data management on behalf of the membership. At a first glance, it is clear that the first thing we need to do is to agree what we are referring to with 'data' – many of us already work in the field and approach data from different perspectives: management, governance, protection, structured and research data, to name a few. We want to explore what you are doing in the data field, and how we can encourage good practice and bring data experts – and indeed, data, information and records – together under the IRMS umbrella. Again, if this rings a bell, do get in touch!

If I sound like I am looking for more hands on deck, you are not wrong there. All Executive members and Trustees are unpaid volunteers with busy day jobs, and we acknowledge it is increasingly a challenge to retain our team members. To facilitate knowledge transfer and onboarding of new team members, we have created an IRMS Executive Handbook, which is a great tool for getting up and running with the work much faster. This is particularly important, as we are still working to get our charity status accepted. We need to demonstrate our relevance and value for the wider society and revisit our mission. As a public sector employee, I feel strongly especially about providing free resources to encourage young professionals and students to develop their skills and networks, and to stay within the profession.

Finally, I would like to take an opportunity to thank all my colleagues on the Executive for their continuing support and work for the Society. I look forward to meeting you all face to face, if not before then, in Glasgow in May!

This year my report will be in two parts: one technical, and one financial and looking at the Society more broadly. I will start by thanking the Constitutional Officers (Trustees) and members of the Executive Committee of the IRMS. My colleagues make volunteering for IRMS a joy. 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 MKSAM and Rev make our jobs as volunteers feasible.

The past year has been one of complex technical financial issues, and the next year will be equally complex. Our application to become a registered charity was rejected, but this time with a long, clearly reasoned, letter. We have decided that the reasons for refusing IRMS were mainly to do with our presentation; we need to focus our strategy and website on our charitable objectives. But I (and the Exec) continue to believe that IRMS is primarily a charity (promoting the art and science of data, information and records management) and a charitable professional membership organisation. We plan to reapply after the summer Strategic session of the Executive Committee.

We also have had complex negotiations with our bankers (HSBC). Apparently, I am still not shown as "Principal User" on our online banking (after 6 years!), but also we need to reopen our accounts now that we are a company limited by guarantee. We also will open a separate savings account for our "guarantee fund". As a company limited by



guarantee, we hold no share capital; each member of the company agrees to contribute £1 in the event of the company failing to be solvent. The Trustees (advised by the Exec) have agreed to take that £1 out of membership fees and place it in a savings account that is protected from day-to-day use.

Finally, we also need to approach HMRC to renegotiate our not-for-profit status, which seems to have disappeared when we changed from an unregistered group to a company limited by guarantee.

Finally, our accountants seem to think that we must present accrual accounts (not cash accounts, which would be clearer to read and understand). They also are using a very convoluted format, which they think is required by Companies House. (You will see this format when I present the formal accounts to the AGM in June. I have put the numbers into our usual format for this Report in the Bulletin.) I cannot find any such requirements in the Companies Act, so we are discussing these issues.

Financially, IRMS is in a healthy state. Our annual Conference continues to grow, to have a vital and interesting program, a lively and informative exhibition of vendors, and a congenial social life. It also makes a profit. Our other income streams (royalties on Bulletin articles, sponsorship for Group meetings, cooperation with training vendors and the Job Board) are also healthy. Our Assets "earnings carried forward" are approaching £100,000, which will give us a good cushion against unforeseen events, and also permits us to invest in our future. We are about to seek a paid (self-employed) General Manager to help us manage the various tasks we have undertaken.

More broadly, I believe that the IRMS Ltd is in an interesting state.

We are doing more for the art and science of data, information and records, and more for the wider society, for professionals in the field, and for our members. We have really important initiatives, like Accreditation, Mentoring, the CAB, and expanded attention to Digital Preservation. In my view, IRMS is slightly too small to pursue all these initiatives easily. We need to grow, perhaps by 50% or more, to have a large enough pool of volunteers to accomplish what we need to do, and wish to do.

I also see that society has greater need for our skills and methods than ever. Recent government and industry events have shown how badly things can go when records are not well maintained and used. (For example, see the Post Office scandal, and Fujitsu's part in it.)

I should end by reminding anyone who has read this far, that being Treasurer is a great deal of fun, with an amazing congenial group of colleagues, supporting a vital charitable society. Roll up, roll up and volunteer!

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>.

Secretary

David Reeve



As my fellow Trustees have already said, the highlight of the year must have been our November Conference in Birmingham. It was a top-level event with great and thought-provoking content, and it was so good to see old friends and meet new ones. However, I am still left with that nagging question... just HOW did Ben Hanlin do those magic tricks!

Much of the role of the Secretary is behind the scenes, managing and supporting a series of activities, such as the monthly Trustee and Exec meetings; organising strategic face-to-face weekends (4 a year, COVID-19 allowing), the annual AGM, election of officers, the Conference and the annual reports.

I do try and get involved in a couple of projects, and this year

I am very proud to have been a member of the Microsoft CAB on Records Management. Others will report in more detail, but a huge well done to Maria and Rob for driving this activity, which is putting the IRMS on a global platform.

I am also starting to get involved in a new project to look at a Skills Framework, more on this over the next period, and I will also be participating in the iPres 2022 Conference in Glasgow this September, working with **Jaana Pinnick** on the IRMS stand.

I want to finish with a big thanks for the support from my fellow Trustees and the Executive and also to **Debra Cairncross** from MKSAM for her secretarial support.

Commercial Officer

Ed Irving



Ed Irving, who has been an excellent and hard-working member of the Exec, unfortunately had to stand down as Commercial Officer during the year. He is certainly missed.

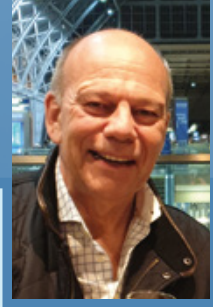
He remained responsible for the management of the production of the Bulletin, our professional thought leadership magazine. We are always so grateful to

our membership and industry vendors who have shared knowledge and experiences through a series of thought-provoking articles. We are always keen on new contributions. As always, special thanks to Tribal and Visual Print.

Moving forward, **Shona Dunning**, our Content Officer will take on the work of the Bulletin. Thank you again Ed.

Commercial Director

Simon Ellis



What a relief to finally see the end of lockdown and attending the November conference in person was the highlight of the year. I have attended the majority of this year's Exec meetings, all of which have been held online.

I have enjoyed contributing to the overall IRMS strategy and hope my contributions have helped. Below I have summarised the main tasks I have been involved in this year.

National online event sponsorship

Working with colleagues on the Exec, we have signed a 3-year deal with Objective Corporation, where they will sponsor three online events each year. The revenue from this sponsorship will help fund other activities for the benefit of the membership.

The first national event, sponsored by Objective Corporation, was "Maximising the use of Microsoft Teams in regulated environments", held on 17 February. It was combined with the Microsoft CAB (Customer Advisory Board) and was a resounding success, with over 200 people attending. And some 300 registered in the first place.

Planning, executing and following up an event requires a collaborative approach. My thanks go to everyone involved and especially **Maria Lim** for setting up content and the speakers, to **Andrew Harvey** for ensuring our Privacy Policy was in place for collecting registrations and to **Rob Bath** for his sterling work on technical support and follow-up to ensure the recordings were available.

We will be creating a schedule of tasks and critical dependencies based on our experience of this first event, so that we can

provide even better follow through for future events.

Temporary membership

In order to help grow our membership, we are looking at ways we could provide a form of temporary membership, enabling non-members to join in some of our member-only events and gain a flavour of what the IRMS is all about, and thus, get a feel for the benefits of membership first hand. This is a task for the coming months.

Corporate membership

Now that the business world is once again opening up, we will be resuming our goal of promoting the IRMS to grow our corporate membership. This task was put on hold during the pandemic.

Supplier directory

Following a number of requests from members on the subject of a supplier directory, which would be a one-stop experience when looking to engage with suppliers, we are looking at the feasibility of creating a central supplier directory.

We have published some questions to help us better understand what suppliers would be prepared to pay a premium for to highlight their offerings, as we need to ensure any such directory covers the costs of running it.

We are now promoting this survey and hope to have insight from the answers later this year, so we can plan, structure and launch the directory. If you work for a supplier organisation, please could you pass this link to your marketing department: https://irms.org.uk/surveys/?id=Suppliers_Survey.

IRMS Accounts

Provisional unaudited accounts for the year ended 31 December 2021

Information and Records Management Society

Provisional income & expenditure accounts for the year ended 31 December 2021

	2021	2020	2019	2018
	£	£	£	£
INCOME				
Subscriptions	115,018	116,452	105,556	113,984
Sponsorship, advertising and meetings	31,397	11,171	251,801	257,182
Annual Conference (50% profit share)	51,256	–	–	–
Interest received	7	91	74	79
TOTAL INCOME	197,678	127,714	357,431	371,245
EXPENDITURE				
Administrative and office expenses	36,413	35,466	35,436	41,022
Bulletins and newsletters	37,425	40,165	34,464	46,579
Groups	–	2,964	8,884	10,646
Postage	279	163	375	276
Stationery	252	179	120	137
Telephone	300	578	1,084	813
Gifts	224	103	879	190
Officers expenses	3,291	2,639	997	3,131
Accountancy fee	1,550	2,030	1,025	1,250
Bank charges	3,687	2,937	3,580	3,155
Annual conference	39,653	3,703	241,030	217,272
Other Conference costs	15,850	–	–	–
Exhibitions	–	–	–	244
Advertising	663	1,154	3,729	2,868
Website	5,997	3,494	8,975	8,424
Travelling and accommodation costs	1,366	1,684	14,805	14,164
Insurance	928	1,233	1,112	1,127
Computer running costs	5,218	3,654	2,330	2,032
Schools toolkit	–	–	1,301	–
Accreditation schemes	470	–	710	–
Bad debts	3,759	(540)	1,782	–
Miscellaneous expenses	–	843	231	–
Subscriptions	247	247	249	284
Workforce Survey	5,000	–	–	–
(Profit) / loss on foreign exchange	204	85	62	96
TOTAL EXPENDITURE	162,776	102,771	363,160	353,710
(DEFICIT)/SURPLUS FOR THE YEAR	34,902	24,943	(5,729)	17,535

Information and Records Management Society

Provisional balance sheet as at 31 December 2021

	2021 £	2020 £	2019 £	2018 £
CURRENT ASSETS				
Trade debtors	16,882	3,014	1,296	6,076
Provision for bad debt	(4,162)	–	–	–
Prepayments	29,140	41,274	20,537	22,541
VAT repayable	–	–	1,513	2,858
Cash at Bank and on Deposit	113,636	87,918	83,336	98,761
Accrued income	35,406			
ASSETS	190,902	132,206	106,682	130,236
CURRENT LIABILITIES				
Creditors and accruals	14,403	6,843	5,114	49,836
VAT payable	1,040	1,446	–	–
Deferred Income	70,917	54,277	56,871	29,974
Corporation Tax payable	6,631	–	–	–
LIABILITIES	92,991	62,566	61,985	79,810
NET CURRENT ASSETS	97,911	69,640	44,697	50,426
GENERAL FUND				
At 1 January 2021	69,640	44,697	50,426	32,891
(Deficit)/Surplus in the year	34,902	24,943	(5,729)	17,535
(Tax owed)	(6,631)			
As at 31 December 2021	97,911	69,640	44,697	50,426

Conference Director

Joe Chapman



What a time to be an IRMS Conference Director! We waited two and a half years for the Birmingham conference to happen, and it will turn out to be the first of three showpiece events in the space of 18 months.

IRMS21 was certainly worth the wait – it was a very special feeling, seeing all of the hard work and anticipation finally come good, and it feels like being one of the first big in-person events in the information world after the pandemic really put the IRMS Conference ‘on the map’.

After going through another rescheduling earlier in the year, the second half of 2021 was fairly hectic, as I and the Revolution Events team juggled the final, detailed preparations for Birmingham, including a number of enforced changes and lingering uncertainties, alongside making sure we had firm foundations in place for Glasgow, just 6 months later.

So, whilst maintaining regular contact with speakers who were waiting to present content they’d originally proposed back in 2019, I was also securing keynotes and inviting contributions for IRMS22, as well as thinking about how to get the most out of the theme and reflect our Scottish setting in all of the various elements that make up the conference.

Unlike in ‘normal times’, there was going to be little opportunity for us to respond to and be inspired by the feedback from the previous conference, but I still wanted to keep things fresh and try to do a few things differently – and hopefully even better.

There are some tweaks to the running order in the programme; we’re focusing on new, local and/or first-time delegates in the opening Fringe; we couldn’t not have a ceilidh on the Sunday night; and we’re moving away from the one-person show closing the Gala Dinner to something truly spectacular and interactive.

In terms of the Conference content, I’m excited about our keynote line-up – in particular that we will be welcoming from across the Atlantic two of the Microsoft team who have been working closely with the IRMS through the Customer Advisory Board – and much of the rest of the programme promises to incorporate the theme of “Resilience, Recovery and Renewal” following the pandemic without dwelling too much on experiences we’d rather put behind us.

I’m also pleased to be continuing to increase the diversity of the programme, with a variety of new and old faces from a range of sectors and backgrounds.

When I’ve had the time, I’ve also been supporting the rest of the Exec as part of the digital working group, as we welcomed new members of the team who are tasked with helping us manage our content and our data better. I really believe that our website, with its built-in membership database, is a potentially powerful tool, and I look forward to seeing how we can maximise that to streamline and improve the way we manage and support our members.

I can’t wait to be in Glasgow on 15–17 May and I hope you’re able to join us.



The past year seems to have flown by in somewhat of a blur – so it's always great to be able to have a chance to take a look back at some of the things we've managed to achieve.

On an internal front, it's been business as usual, with plenty of support and tweaks to our systems to keep the lights on, but no major changes to report. A year ago, I was expecting that our transition into Microsoft 365 might have begun, but, unfortunately, as we are still waiting to become a charity, we've not been able to move our content and processes just yet. This means that I can look forward to the joys of this migration in the future – and hopefully over the next 12 months.

Instead, I've been able to focus my time on various other ventures, including being able to discuss Microsoft 365's retention and compliance capabilities at various events. In September last year, I was invited to speak to the Public Sector Group about some of the recent changes to retention being introduced by Microsoft, in which I detailed 'adaptive scopes' and the 'multi-stage disposition'. I was also fortunate enough to present at the Conference in Birmingham, where I discussed some of the peculiarities of Microsoft Teams with regards to governance. The highlight of the Conference for me was finally getting to meet most of my fellow Exec members – a whole year after I first became Digital Director.

Our Customer Advisory Board (CAB) with Microsoft has also grown from strength to strength over the past year, and has even had its first major success, with Microsoft providing users with the ability to delegate disposition reviews – one of the retention issues that we've been raising with them since the very first CAB. I'd like to thank **Maria Lim** for all of her hard efforts keeping the CAB on the road.

One of the highlights of my past year has been helping The National Archives to create a Maturity Model for Microsoft 365. This module extends the existing Information Management Self-Assessment tool provided by TNA and will hopefully be co-launched later this year by TNA and the IRMS. I'm hopeful that this tool will prove to be a useful starting point to gauge where you are with compliance in Microsoft 365.

Do drop me an e-mail via <digital@irms.org.uk> if you have any questions – I'm always happy to help.

Content Officer

Shona Dunning



Hi all,

As I have only recently stepped into the Content Officer role, I am just going to give you a little flavour of the work that I'm starting in the coming months:

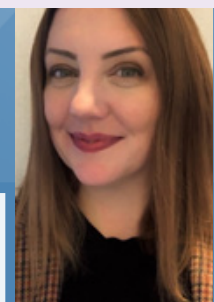
- Full content review and user analysis of the website and our other channels, checking that they are still valuable and relevant to members and the public.
- Working with other members of the IRMS Executive team to ensure we maximise the use of the content we have.
- Working with Jaana on the IRMS History project.
- Beginning creation of a Resource Library for IRMS members.

- Liaising with Tribal on production of the Bulletin.
- Investigating more interactive delivery options for our toolkits.
- Reviewing our overall approach to toolkit production.

As always, this is your IRMS, so please e-mail <content@irms.org.uk> if there is anything you feel we are missing on our website, anything you have spotted that is out-of-date or no longer relevant, if there's anything you would like to add into the IRMS History project, or indeed if there is a piece of content you would like to contribute!

Digital & Training Officer

Leanne Robertson



I was delighted to take on the role of Digital and Training Officer for the IRMS in mid-2021. Having the opportunity to work with similarly impassioned individuals from a variety of sectors and backgrounds has been invaluable.

My role primarily has been to provide back-end support for the website and to support member comms activities. Additionally, I

have begun a detailed review of the Jobs Board and the Member Journey from initial sign up, to renewal, to transition to and from different membership types. In 2022, we aim to turn the findings of this review into meaningful opportunities for improvement that will ultimately support how we continue to bring value to our members and streamline administrative challenges.

Groups Director

Suzy Taylor



During 2021, the IRMS Groups were as active as ever, with a full calendar of online events.

The Group Chairs are heroes of the IRMS, on the front-line networking with members and organising some really well attended events, attracting attendees from around the world, and so, I would like to thank them all for their efforts on behalf of the Society.

We have had some big personnel changes during 2021, with new faces at the helm of some of our biggest groups, and some group chairs retiring from post. It's also been the first time we've been able to meet some of the chairs face to face at the November conference.

In 2021, we appointed a few new Chairs who hope to start hosting events in 2022:

- Islands Group – **Scott Sammons**
- Legal Services Group – **Iram Ditta** has moved from the North Group to take over Legal Services from November 2021. With a law background, it looks like a good fit.
- South West Group – **Patricia Stabbins** volunteered to be our new South West chair in October 2021.
- Financial Services Group – **Paula McClure** is our new Financial chair starting January 2022.

In 2021, the Wales Groups lacked a chair, and this has been an outstanding post for a while - we really still want to appoint and I would encourage anyone who would like to try to contact me for a discussion.

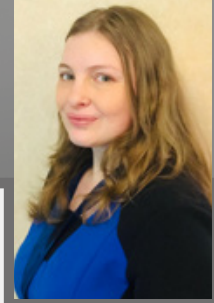
The following Groups also still need volunteers...

- Midlands – A fond farewell to **Emily Gresham**, who has had to retire from her post after a period of maternity leave, during which she heroically continued to monitor contact with group members. We wish her and her family well and send thanks for her work on behalf of the Society.
- Third Sector – during 2021 **Gary Shipsey** retired from the Third Sector Chair. We wish him and his family well too and send thanks for his work on behalf of the Society. We know we'll catch up with him soon at the Glasgow conference in May.
- Digital Preservation – during 2021, the Digital Preservation Group held events supported by the Vice Chair of the Society, **Jaana Pinnick**, and our Groups Officer **Neil Reeves**. Officially without a chair, we are looking for anyone who would like to take on this role for 2022.
- HE and FE – during 2021, **Alice Temple** gave the position a go but has had to step down due to work commitments. We wish Alice well, recognising her work on behalf of the Society.
- North – as mentioned above, Iram Ditta has vacated this position, so we are looking for another chair to step up.
- Wales – come on Wales, we can do this, give me a call!

If you are interested in chairing a Group please contact me at <groups@irms.org.uk>.

Marketing Director

Sarah Norman-Clarke



It's with a tinge of sadness that I write this report. It is my final one as a member of the IRMS Executive after close to 6 years. I've made great friends on the Executive, learnt new things and had a fantastic time doing it. I would urge you all to think about getting involved – I'll be watching from the sidelines as a member and eagerly seeing how the Executive takes the society forward.

This year saw our first ever Christmas campaign launched (which gave me the opportunity to play around with designing Christmas themes with our very talented colleagues at Visual Print). The campaign sought to attract new members with a 10% discount. We had an encouraging response, in terms of numbers of people requesting the code to join, so hopefully they enjoyed their Christmas present of IRMS membership.

I've also been working on mapping out the potential marketing channels for IRMS – at present, our website is the primary marketing tool, but, with new platforms being created, the Society needs to be sure we're reaching as many potential new members as possible. I'm hoping my successor can build on this to

create new campaigns and attract new members. If you have any suggestions, please reach out!

Unfortunately, owing to work commitments, the planned marketing campaign for spring has been slightly delayed (though I hope it'll roll out in time for conference) – this will look to give teasers of the content that is currently behind our paywall.

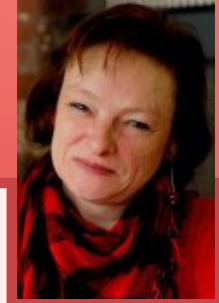
The Society will also have a stand at iPRES – the Annual Conference on Digital Preservation – the link between information management and digital preservation is getting stronger every year, and there is much the society can offer on this front, though we won't be neglecting our information roots.

Analysing the search engine optimisation shows that the most searched for content on the IRMS website remains our toolkits and MoReq – these draw users to the site, and the Executive has been looking at new content to match the success of these, which will be picked up by the Content Officer.

I will hopefully see many of you at conference this year, but thank you for all your support, as always.

Membership Director

Heather Jack



Having been actively involved with IRMS since 2006 in a number of volunteer roles, from Scotland Group Chair to Conference Director and Groups Officer, I was very excited to take on the role of Membership Director in May 2021. You, the members, are our raison d'être – without you, there would be no IRMS.

Unfortunately, due to business pressures and personal issues, my first year in the role has mainly been focused on the operational aspects of the role. I produce current and new member reports to the IRMS Exec on a monthly basis, as well as fulfilling ad hoc statistical requests.

The Membership Director role is ubiquitous, and I get involved in a range of member enquiries, resolving these directly or by signposting or collaborating with other IRMS volunteers.

It is very clear that the IRMS provides a rich and ever-growing offering to its membership, but it is possible that we are not proactive enough in helping our members get the most from their membership. Resources could be targeted based on criteria such as

career journey stage, employment sector or job role. We also need to look at changes in working and collaboration practices, and indeed member requirements as a result of COVID-19, and adjust our offerings accordingly; yes, there are challenges to address, but also opportunities to build on. The popularity of the schools membership type is proof of the value of this targeted approach.

To this end, the other area I have been focusing on is current assessment of the IRMS Membership journey and wider membership management processes based on my experience as Membership Director and as an IRMS member myself. This work is being undertaken as part of the current Membership Review Project, led by the Digital and Training Officer, and aimed at improving current member experience and involvement, as well as attracting new members. We'll keep you updated on the progress of this and provide opportunities for your input. In the meantime, please don't hesitate to contact me <membership@irms.org.uk> with any questions, feedback or ideas about your IRMS membership experience.



Yet another challenging year for the Executive, our membership and the world at large!

It was very fortunate that we were able to hold a 'physical' Conference and Awards evening in November at the Hilton in Birmingham. This was well attended, and all who attended appeared to have a great time – discussing challenges and opportunities with colleagues, counterparts and vendors/solution providers.

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.

My role 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.

Standards – BSI and ISO

I attended a week of online (Zoom, of course!) meetings in May 2021. These meetings are all related to ISO Records Management Standards/Technical Reports and Ad Hoc (work) Groups (AHGs). In addition, I have spent over 50 hours attending BSI and ISO meetings and working on draft documentation. Some of the Working Groups I am currently participating in are:

ISO/TC 171/SC 2/WG 11 (WG11)

We are reviewing the proposed ISO/DTS 18759 prior to publication by ISO. DTS 18759 is "Document Management – Trustworthy storage system (TSS) functional and technical requirements".

ISO/TC 46/SC 11/WG 20 (WG20)

We are reviewing ISO Standards to determine which refers to disposition. We are working to determine how we can ensure the term 'disposition' can, and should, be used with the same meaning and inference across all ISO Standards.

ISO/TC 46/SC 11/WG22 (WG22)

This is a working group to develop guidelines around the issues and considerations for managing records in structured data environments. It seeks to understand and articulate the need to identify records and data and how the two interact. This is, in part, to ensure that consideration is given during the architecture design stage to enable appropriate life-cycle management of data and records.

Executive initiatives

The following are initiatives to which I have contributed (and continue to contribute):

The development and launch of a "Campaign for Records". This will be a campaign to raise awareness of records and information management and the need for appropriate retention/protection of these. The IRMS is developing this campaign with other, relevant, professional organisations.

Groups – Financial Services Records Management Forum (FSRMF)

As a result of time constraints, I resigned the position of Chair, Financial Services Special Interest Group. I wish the new Chair "good luck" and will continue to support them as and when required.

Sadly Melissa, Kennedy had to resign the role during 2021 after doing an excellent job. Since then, we have struggled to find a replacement. Chiara Fallone and Angela Carabasu have both filled the position but found it difficult with changing work commitments and felt they couldn't give enough time. We are grateful to both for giving it a go.

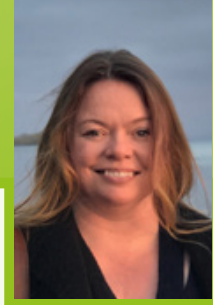
Melissa had run the successful monthly Twitter Hour with a subject specialist asking 5 questions. There were great discussion tweets from all who attended.

Whilst we continue to recruit a volunteer to fill the post, a Comms sub group of the Exec has been set up to produce our bi-monthly newsletter "Off the Record", and the Bulletin news, notification to members of events, managing social media posts and other comms activity. Shona, as Content Officer, has taken on the role of reviewing the content on our website.

We are currently advertising this volunteer role and are keen to hear from anyone interested in the position (which needs about 4 hours a week).

Training Director

Penny Wright



This is my first year as Training Director, and, like last year, it has been a year spent working around the disruption COVID-19 has made to all our lives.

The shift to enable working from home has arguably been one of the success stories of the pandemic, and our IRMS Training Partners have responded brilliantly by making their courses available online while this has been necessary. While remote learning is not the same as attending in person and lacks the social aspects of learning together, this has meant training has become much more accessible to those who otherwise would not be able to travel and attend in person.

After such a long wait, in the end, I could not make it to the IRMS Conference in Birmingham in November, but I'm really looking forward to this year's Conference in Glasgow in May, as Conference is so important in cementing the connections you make across the profession and just catching up with friends. I am particularly looking forward to the panel session I'll be hosting, along with some of our training partners. We will be discussing how training can help us manage the fast-paced change in our profession and have a closer look at the training our partners offer. All members get a discount on courses of between 10 and 20%, so it is an opportunity to find something to fit your current needs.

This year, I'll be undertaking some Training Needs Analysis, to try and get a clearer picture of what you as members expect and want from our training offering – what subjects you'd like more focus on or any that you feel are missing. This will start with a member survey, which I hope you will respond to – your voice is invaluable to us, so that we can make the Society as useful to you as possible.

Along with some of the IRMS Executive team, I'm participating in the CILIP workforce mapping project, and IRMS will also be running another project to create a Skills Matrix, involving other organisations (along the lines of our extremely successful Microsoft CAB). This project will aim to look at creating standards for job roles within our profession. I am involved in both of these, so let me know, if you would like to know more about them.

Finally, I am part of the Accreditation committee, which, led by **Scott Sammons**, looks after not only member Accreditation, but the mentoring programme and work on apprenticeships, the skills matrix and other projects. The IRMS committees undertake some really interesting work, and it is one of the best reasons for being part of the IRMS Executive team.

Data Governance Officer

Andrew Harvey



At time of writing, I've been the IRMS's Data Governance Officer for just shy of a year.

During this time, as the role has incorporated the role of Data Protection Officer (DPO), I've laid the foundations to make our data protection practice even more robust. Some of these key actions have been:

Undertaking an internal audit against the key areas of the data protection legislation, to understand where to concentrate our resources.

Drafting an internal Information Governance, Data Protection and Records Management Handbook, to pull together and align all of the key messages and requirements of existing policies and procedures in one place.

To propose and have passed through the Society's Executive Team that we should voluntarily have a DPO, to demonstrate our commitment to best practice as thought leaders in the field of data protection and records management.

During my period in office, I have also led on the Society's response to the Department of Digital, Culture, Media and Sport's consultation, Data: A New Direction, which proposed swingeing changes (again!) to the data protection legislation, and submitted a formal response from us to them. This was undertaken via a membership poll and highlighted that our main area of agreement with the proposed changes is that fines for breaches of the Privacy and Electronic Communication Regulation should be

increased to the same level as those that can be imposed under the current data protection legislation. Conversely, our main concern was that the requirement to appoint a DPO should be removed.

I have enjoyed my time as Data Governance Officer but have unfortunately found that, due to the pressures of my professional role, additional consultancy and family life, I have simply not been able to give it the time I would have liked, or it deserves and needs. As a result, I have sadly decided to stand down from the Executive, for the time being at least. I wish my successor, the Society and all its members well, and will, of course, remain involved as a very proud member of our College of Fellows.

Accreditation & Fellowship Subcommittee

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

First and foremost, I wish to thank the volunteer members of the Subcommittee and Debra at MKSAM. We have worked our way through a busy work plan this year to put us in a good position as we entered 2022, and all their efforts are greatly appreciated. All by only dedicating a couple of hours a month!

During 2021, I am very pleased to say that we have completed the following:

- Full accreditation data audit and cleanse
- Review and updating of the process, handbook, guidance documents and templates
- Reviewed 11 completed applications and supported a further 34 initial queries, draft applications and applicants wanting buddies
- Establishment of a documented role profile and Code of Practice for assessors
- Supported the national Data Protection & IG, as well as the Archivist & Records Manager apprenticeship initiatives
- Refreshed marketing materials for accreditation and attended a number of sector events to promote accreditation

As of the 1 January 2022, we have 100 accredited current members of the Society. As the Society grows, we expect that number to grow organically with it and will report on its progress.

For 2022, we are planning on looking at the following areas. If you feel you can help us in any of these areas, do get in touch via <accreditation@irms.org.uk>, or be on the lookout for our all member comms and consultations. We are planning to:

- Consult on and review the accreditation Code of Ethics
- Begin a recruitment campaign for more accreditation assessors
- Run an accreditation marketing campaign, with special focus on health, policing & government
- Research options for maintaining accreditation & recertification
- Begin research into key skills in IRM/IG etc for professional development
- Research and consult on the future of Fellowship
- Migrate (hopefully) across to the Microsoft 365 platform for managing various aspects of accreditation

We have a vacancy on the Subcommittee, so if you feel you can contribute to the development of accreditation & fellowship, and are yourself accredited, then please do get in touch!

Data Management Officer

Claire Boyle



As the newly appointed Data Management Officer for the IRMS, I've had an exciting 9 months. My remit is around how the Society manages and stores data, information and records, with a particular focus on the day-to-day quality and management of the Society's information. I'm looking at what information we have, where and how we currently store it, and how we can do that more effectively and efficiently.

As part of my role, I get to work with the entire Exec committee, and it's been a fantastic way to learn more about how the

Society works behind the scenes. I've started to pull together a picture of what information we have, and what functions we undertake as a society, and I'm hoping that over the coming months, I can build on that, to give us an idea of what a new filing structure might look like. I'm also starting to research how we can start to leverage tools like the Google suite, and Microsoft 365 to help us help our members and become more modern and collaborative in the process.

It's a short update from me this year, but I'm looking forward to continuing to get stuck in, and to working more closely with the rest of the team throughout the rest of 2022. I can't wait to see what the year brings!

Awards Development Sub-Committee (The Awards Panel)

Reynold Leming, Panel Chair

It was fantastic that, at the IRMS Conference in Birmingham last November, we were able to hold a live annual Awards Ceremony again for 2021, which I co-delivered with the magician Ben Hanlin (who also provided the after-dinner entertainment). My congratulations again to all nominees and winners.

You can see the outcome in all categories here: <<https://irms.org.uk/page/Awards2021>>. It was also great to get all the 2020 award winners who were at the conference to come on stage for a photograph.

We will be holding the 2022 Awards Ceremony at the IRMS Conference in Glasgow this May.

In 2021, the Awards Panel reviewed the Awards categories and criteria. Whilst no changes were made to the categories, the criteria for eligibility and nomination were refreshed. There was also a renewed process of engagement with the university community, regarding the New Professional Award. Work will be undertaken in 2022 to review the application and appeals/complaints processes, as well as a review of the Sub-Committee Terms of Reference.

My big thanks to Panel members **Ben MacCorquodale, Heather Jack, Jane Proffitt** and **Sarah Norman-Clarke** for their efforts and input. My big thanks also to **Alison North** for her continued patronage of and work on the New Professional Award.

Throughout the year, the Chair and Secretary, along with Committee Members, sought to develop seminar programme agendas and exchange ideas on how to best progress issues. Due to the pandemic restrictions, there were no face-to-face events held by the IRMS Ireland Group in 2021. Whilst the pandemic impacted significantly on our networking, good opportunities to engage with other groups across Ireland, the UK and beyond were still provided through conferencing platforms, social media and the IRMS Arms Pub quizzes.

The Group Committee communicated via e-mail and virtual meetings and organised two online seminars in 2021 – in April and December. On 28 April, we hosted a “Lunch ‘n’ Learn” Webinar on IRMS Accreditation with **Deirdre Allison** as our guest speaker. This successful event was well attended and very informative. Our second “Lunch ‘n’ Learn” was on 13 December. The guest speaker was **Niall Mulligan** from DPER, on the current FOI Review being undertaken by his department. It was also very well received.

The Group welcomed the return of the IRMS Conference in Birmingham in 2021, and although a few of our members were able to attend, unfortunately local restrictions meant that the usually large Irish contingent were not in attendance.

In November 2021, **Liz Robinson** stepped down from her role as Ireland group chair after a 3-year tenure. Liz steered the ship through a most challenging period for us all, both professionally and personally, and we extend our thanks for her leadership and enthusiasm. **Jenny Lynn** was nominated as the new Ireland chair.

In 2022, the group is endeavouring to re-introduce face-to-face events, with a joint ARA/IRMS seminar day scheduled to be held on Thursday 2 June, in PRONI, Belfast. All ARA and IRMS members are warmly invited to receive some of that famous Belfast hospitality. We will also continue with our popular virtual “Lunch ‘n’ Learn” seminars, starting in March with a session on cyber-security, with **Joe Dolan** from NI Cyber Security Centre. Further sessions will be announced.

Thank you! Go raibh maith agat!

It's been a quiet year for the IRMS Scotland Group. Although the group is supported by an experienced committee who meet regularly, other commitments have prevented significant progress in the areas we all hoped to advance.

We have however engaged with the Scottish Council on Archives in developing a manifesto for upcoming Scottish Council elections, which hopefully goes some small way to improving the visibility and recognition of the importance of the information management professions in Scotland and beyond.

The Committee was able to host a webinar with a committee member, **Tigan Daspan**, highlighting the information management work he is delivering for Food Standards Scotland. The Committee and wider Scotland Group members were well represented at the National Conference in Birmingham, and it was really great to meet so many colleagues from north of the border over the course of the 3 day conference. I had the pleasure and privilege of meeting fellow

Group Chairs and wider Executive Committee at Birmingham and on video calls since, and it's inspiring to see the work that is delivered by the Society and indeed the profession across the country.

I'm delighted to have been nominated as the Marketing Director for IRMS moving forward; however that in turn means there's an opening as Scotland Group Chair going forward. I'm disappointed I have not been able to build on the fantastic work of my predecessor during my time leading the group; however, I think the time is ripe for some new blood in the IRMS Scotland Group, and hopefully there's someone out there willing to step up, who's motivated and able to deliver on the great ideas of the wider committee.

Finally, I am delighted that the National Conference is returning to Scotland this year, and I'm sure Glasgow will welcome delegates with open arms in what is sure to be another fantastic few days of learning, networking and socialising.

In 2021 IRMS North enjoyed three online sessions. Unfortunately, due to COVID-19, we had to cancel two additional sessions at short notice.

In February, we held an “IRMS North Members’ Only Virtual Networking Session”. The session was well attended and the conversation focused on regrouping and getting to know existing and new members. We also discussed what sessions would suit IRMS North members given that the membership ranges from seasoned information governance professionals to those new to the profession. There was a strong sense of putting on both topical sessions and Records 101 sessions on the basics around information governance and records management.

In March we were delighted to have **Cameron Thornton**, Solutions Director, and **Mat Graves**, Regional Director at Objective Corporation, join us to deliver a session on “Frictionless Information Governance with

Microsoft 365”. The session covered the new challenges that Records Managers face in the ‘modern workplace’; how to provide sustainable governance with Microsoft 365; how to deliver a holistic approach for information assets, regardless of the system used to create or edit; and internal and external collaboration good practices in 2021.

Finally, we held a first of its kind, a Joint IRMS North and Higher Education Group Session with the new Higher Education Group Chair – **Alice Temple**, on the topic of “Tracking Student Data”. This group session was aimed at starting a discussion around the ethical use of student data collection at higher education institutions, with the aim of catering support needs for students.

I have very much enjoyed my time as IRMS North Group Chair, and I am sad to announce that I will be transitioning away from the North Group Chair to the Legal Services Group Chair, which means the position of North Group Chair is now vacant!

IRMS Property Group

Jamie McDonald

2021 was another tough year for us all, but, even so, we managed to have our first virtual property group meeting “Maintaining an Information Governance Hub”, which was held in March 2021. This event was led by **Ren Leming**, and it looked at the importance of how to implement an Information Governance Hub in organisations so that Information Assets of any type can be properly managed. If you missed it – it is viewable on the IRMS YouTube channel.

Looking forward, we are hoping to go back to in-person meetings in 2022, with a new series of roundtable discussions on issues and challenges facing organisations working in the property and real estate fields. The topics will include implementing SharePoint, Teams Governance, digitisation, and how best to surface information. Keep an eye out for our next meeting!

The islands of Jersey, Guernsey as well as the Isle of Man and the Falkland Islands are all key areas of fascination from an information governance perspective. All of them have their own Information Laws and frameworks, and although they are all a little bit different to the UK, they still face the same common challenges that we do here.

In late 2021, this group was refreshed to accommodate the needs of all our island-based members. While dormant during the 'COVID-19 years', the group is now back up and running and looking to grow through 2022. A summary of our plans are below:

Isle of Man:

- We held our first event in Douglas on 14 February 2022, with speakers from Leadership Through Data, Act Now, Isle of Man Government, Manx Public Records Office and others, with plans for another face-to-face event around September/October
- We have agreed a joint working arrangement with the local DPO networking group run by the Chamber of Commerce, as well as support from the IOM Government and cross-island businesses

Jersey & Guernsey:

- Due to conference embargo, it will be difficult to hold an event in the first half of 2022 (and run the IOM group event), so we are planning one for around September 2022
- We have reached out to the local Jersey Information Commissioner's Office, as they are very proactive and run networking events, so this is something we could jointly work on

Other things:

- We have members in the Falkland Islands and Gibraltar, so we are currently researching to see what their needs are and how we can support them
- At the moment, it's just me, and as I also have other IRMS duties (and a day job), I am actively seeking volunteers from on and off the islands to help me run events throughout the year. If you think you can help, contact me at <islands@irms.org.uk>.

We decided to keep the IRMS Public Sector Group online for 2021, so we could plan the 2021 programme. We held seven sessions on Livestorm on a variety of topics.

The topics covered included **Scott Sammons** presenting about automated intelligence, **Jaana Pinnick** introducing digital preservation, and **Alan Shipman** looking at legal admissibility. We were also pleased to welcome **Helen McElroy** from the NHS. **Robert Bath** covered a number of aspects of managing records in Microsoft 365.

Paul Duller looked at the way in which the COVID-19 pandemic has changed the way that we view and manage records, and he also talked about the different tools which are available to enhance remote working. We finished off the year with a presentation by **Alison North** about how records managers can start to look at the new skill sets that records managers will need following the pandemic.

One of the benefits of moving online has meant that many more members have been able to attend the events, and we have welcomed attendees from all over the country as well as other parts of the world. The intention moving forward will be to create a hybrid programme, which will include at least one in-person event. The 2022 programme will be predominantly online to allow us some consistency in planning. We will be consulting with the members of the Group as our plans progress.

I would like to express my thanks to the generosity of our speakers in giving up their time to share their expertise with the Group. I would also like to extend my thanks to **Sarah Graham**, who has dealt with the Livestorm technology and looks after all the communications for the Group.

We spent the last part of the year consulting with the members of the Group to set up the 2022 programme.

I took over London Group Chair duties in June 2021 and spent time inducting into the role and learning what tasks as Chair to learn and develop.

I ran my first online event titled "Retention Scheduling", which was very successful. Our experienced guest speaker **Rachel Maguire** led a session on developing retention schedules. It was well attended, and lots of great discussion from attendees occurred at the session.

I then attended the IRMS Conference in Birmingham last November, and it was great to meet and speak with the IRMS leadership teams and other Group Chairs. I learnt a lot about the role as a Group Chair.

The London Group has two further events planned in the next few months:

- Data Governance Basics and the Relationship with Information Management
- How Did Records Management Begin?

I am currently planning more events for the rest of 2022. I'm also attending the IRMS Conference in May and continue to attend Group Chair meetings with other IRMS Group Chairs and leaders.

2021 was a time when the COVID-19 challenges significantly disrupted day-to-day school activity.

The impact of COVID-19 on schools, as with all sectors of society, has been intense. General feedback from schools has been that they needed to concentrate on the day-to-day changes to guidance and regulations issued by the Department for Education. Managing both staff and pupil absence has been the priority.

Sessions to consider the Toolkit review were well attended, and a number of people offered support to participate in the review. Drafts of material to consider the "Pupil and Educational Record" were shared, but then the lockdown hit.

Work was being done on the Schools Toolkit review. This has changed shape and form, the planned move to a more 'Grab and Go' approach has taken some time to refine.

The decision to split the Toolkit review from the general work of the Schools' Group reflected the importance of providing a distinct offer for schools and those who have an interest in school related records management.

Workshops that looked at e-mail management with **Scott Sammons** back in June 2021 and a review of Social Media principles were well attended and very well received.

The Schools' Group has a series of online webinars lined up for the academic year 2022.

However, we started 2022 with a great session from **Richard** at Records Transformation. It was a very helpful overview of the principles of Records Management.

Future sessions will have been arranged to look at the relationship between Schools, Records Management and Governance, HR and Finance from experts in each of the fields.

Other contributors are welcomed.

During 2021, the Information Rights Group continued to meet online. We held two meetings with:

Scott Sammons – Records of Processing Activities (Article 30)

Ibrahim Hasan – The CCPA – how different is it to the GDPR?

I had wanted to hold a lot more meetings, but unfortunately due to chronic ill health relapses and the loss of RMDog in July 2021, the Group saw no activity from the Summer of 2021. For me, this was quite disappointing, but during 2020 the group had been very active during the pandemic.

Due to being chronically sick and the grief from losing RMDog, I was unable to commit time to the Group. However, Information Rights continues to stay upright and continues to provide good quality in depth sessions with learning benefits for the everyday professional.

I pride myself on ensuring that our Information Rights events always have proposed learning outcomes, and I give a beginner/intermediate/advanced/expert warning, so that all attendees know what to expect from the content they are likely to engage with. There's not a generalist session in sight! It enables us not only to sell the benefits of being a member of IRMS to the attendees by showing them what they are getting upfront, but also to demonstrate to our potential sponsors what it is they are supporting.

Spring 2022 will see a welcome return of meetings, on the first Wednesday of each month at 1:30–2:30pm with April, June, July, August and October filled already. 2023 will hopefully see the return of face-to-face full-day meetings in various locations in the UK and Ireland.

2021 Events

IMTech continued with online events, reaching out to member communities and professional communities at large and internationally.

We continued to have regular Microsoft Customer Advisory Board (CAB) and CAB Working Group meetings, which is still expanding. Microsoft has indicated they'd like to change the membership mix of the main CAB group in 2022, which hopefully will not impact on the effectiveness of the quarterly meetings.

On the RoundTable and Knowledge Share events, we have attracted a good number of delegates, varying between 80 to 300.

We delivered a successful collaborative ePADD event with **Jaana Pinnick**, IRMS Vice Chair, the Digital Preservation Coalition, and speakers from prestigious academic institutions. ePADD is an open-source historical e-mail archives tool.

Social events

Due to a heavy workload, I have not delivered online social events; however, I am hoping to invite IMTech members to an informal session at the Glasgow Conference.

Committee

IRMS Digital Director, **Rob Bath**, acts as the IMTech adviser. Our IM Tech Leads, **Khopolo Jamangile** (of Perth and Kinross Council) and **Kim Pearson** (of The Girton College of Cambridge University), are becoming more directly involved with managing the CAB Working Group.

Membership

I am getting requests and confirmations of IMTech membership; however, I have no insight on new members joining.

Other initiatives and the future

We will expand partnerships beyond Microsoft and reach out to Google and AWS when Khopolo and Kim have established themselves by running the monthly CAB Working Group meetings. I will also organise members-only initiatives at some point.

Together with the Executive, we will strengthen our Microsoft Partnership via the CAB, and with the community, we will influence the roadmap of the development of the Microsoft 365 platform.

