

Annual Report & Accounts  
2013/14



information  
and records  
management  
**society**

# Chair's Report

Nicholas Cooper · chair@irms.org.uk



I am pleased to present to the membership this annual report which includes the activities of the Information and Records Management Society over the period 2013/14.

The Society has faced a number of challenges in recent years as the world has been through troubled economic times, and we have looked to manage our resources more efficiently and effectively to benefit the membership. Gaining a better understanding of our real financial position has been key to knowing what resources we have, and where they can be used to the benefit of the Society. I delighted that we have now reached that position.

In this report we see how people from the UK and across the globe are working, often behind the scenes and usually unrecognised and unrewarded to maintain, promote and manage the IRMS: organising events and meetings; delivering conferences; training sessions; writing articles for the Bulletin and Blogs; giving talks and presentations as well as a great deal more.

This annual report is made up of submissions from members of the Executive Committee who have provided statements on their areas of responsibility and activity and from the Society's Groups. I thank them all for their hard work and endeavours throughout the year.

The IRMS is truly global, with members from all geographical areas of the British Isles, and further afield in Europe, Africa, Asia, Australia, New Zealand and the Americas. Social media has

helped the IRMS to extend our global reach to non-members. We now have around 4000 members of the IRMS LinkedIn Group, an active Facebook account, over 500 IRMS Twitter followers and in excess of 900 IRMS Conference followers – all of which, in turn, spider out to a far wider audience. A new channel of communication has been the podcast, a series of interviews with opinion leaders from the profession and is conducted by **James Lappin** and **Heather Jack**. These broadcasts address a wide range of contemporary issues faced by our members and the wider profession and have a quickly gained a consistent following.

I have invested a good deal of time contacting lapsed and cancelled members to understand why they have not stayed with the Society. While there are a number who leave for the very natural reasons of retirement and change of career, it is the other category

of those who leave the IRMS who give the indicators for where the Society needs to adapt to meet the needs of the profession. This exercise was also rewarding in that a number decided to re-join the Society.

An extension of this work was the membership survey, which developed the knowledge of why people join, why they stay, and what elements of being a part of the IRMS are important.

Combining this information will aid the Society to develop and increase the value of membership, extend the time people remain as members, reduce the number of cancellations – and provide a platform for encouraging people to join.

**The IRMS is truly global, with members from all geographical areas of the British Isles, and further afield in Europe, Africa, Asia, Australia, New Zealand and the Americas.**

This should not be a one-off exercise, but part of a continuous process of development to meet the evolving requirements of the members and the changing nature of the profession.

May I thank all those members who have contacted me to express their views on where the Executive can add value to being a member of the Society, and develop the breadth of influence which can be reached by the IRMS.

There is a constant need to provide members with value for money. The Bulletin is a quality journal, and recognised as a flagship for the Society, with a requirement to ensure it continues to meet the high standards expected by the members at a reasonable cost. Whilst the content and design review continues, may I thank all those members who contributed to the survey, I am pleased that the move to the new size will reduce the annual production cost by over £10,000 per annum, money that we can re-invest in providing other services to the membership and the profession.

I thank Tribal, Hargrave Design, and PK Imprint for all their hard work with the Bulletin, and in particular **Jamie Burton** for his sheer dedication as Editor. I also thank **Germanicus Fillippo Hansa-Wilkinson** for his work as proof reader.

Following the success of last year's conference I have signed a 5-year agreement with Revolution Events as our conference organisers. Their energy, ideas and guidance have been a tremendous benefit, and helped make the conference a success. The conference is a major investment of time for a number of the committee and I am pleased that this year's event, with the theme of Information & Records Management – Luxury or Necessity, is on

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track to deliver another success and provide a surplus, which will seed the work for conference 2015. This year we have made greater emphasis in Continuous Professional Development (CPD) in response to members' comments, with all the

speakers identifying the learning outcomes to assist delegates in choosing which session to attend. Conference will also feature the analysis and results from the Forrester Research survey conducted among members of the Society. The organisation of conference is a significant exercise, and does involve a

huge proportion of time of those members of the Executive who are involved. I thank **Rob Hutton** and his conference team, **Shona Dunning, Emily Overton, Roger Poole, Scott Sammons, Matt Stephenson & Meic Pierce Owen** for all their hard work in putting together Conference 2015.

Over the past year we have been looking at venues for future conferences. I have agreed a contract for next year's event to be held at the Celtic Manor Conference Centre in South Wales. The conference will return to the Hilton Metropole in 2016 – but at 2014 costs. We are investigating venues that are both suitable for the needs of the IRMS conference, and meet the cost model, in Scotland and the North of England for 2017 and beyond.

May I take this opportunity thank those at Revolution Events, Nick, Emma, Deborah, Emily, Eli and Mike for their innovation, ideas and enthusiasm for the IRMS Conference.

Our membership and administration team at Kingston Smith Association Management have provided some sterling work over the last year, and overcame the

challenges of starting their services for the Society at the same time as membership renewal.

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We have received a good number of compliments on the quality of the service that they give and work of the team, Tina, Suzanne, Charlotte, Claire, Tina, Gabby and Kieren, is greatly appreciated.

Finally work on the Web site continues to evolve and my thanks go to **Emily Tarrant** of Webfooted Designs for her advice, support and the tremendous level of dedication which she provides.

There are a good number of people who are involved in the running of the Society, and my apologies if you are one I may have overlooked.

The IRMS is non-typical as a society or association organisation in that we have a significant percentage of the members who are actively engaged through our groups, and on-line platforms. This presents us with a tremendous opportunity to build for the future. While we do have a small number of professional staff undertaking outsourced activities, the majority of the work is done by volunteers from the membership, and it is only through expanding this group of volunteers that the IRMS can continue and evolve. Please do consider what you can do to support and promote our Society.

## Vice Chair's Report

Shona Dunning · [vicechair@irms.org.uk](mailto:vicechair@irms.org.uk)



**M**y first year as Vice Chair has been an interesting and rewarding experience. Stepping into the shoes of **David Bridge** was never going to be easy – he has bigger feet than me for a start!

As Vice Chair I have attended all the Executive committee meetings and monthly conference calls

**In addition to all the wonderful directors and officers on the IRMS Committee, I have had the honour of working with some fantastic people.**

as well as catch up calls with our administrative and membership services team, KSAM.

Continuing on from last year I have been part of the Conference Working Group, leading on the delegate experience with **Emily Overton**. Working with the team from Revolution Events we have been tasked with deciding on items such as the handbook, the social events, bags, right down to the colours of the lanyards worn at the event.

In addition to all the wonderful directors and officers on the IRMS Committee, I have had the honour of working with some fantastic people and I wish to pass on my appreciation and thanks to them for all their help and hard work over the past year.

I am looking forward to another productive, exciting and successful year!

# Secretary's Report

Leanne Bridges · secretary@irms.org.uk



**O**n a personal level the last year has been an eventful one, including a job move, a new course of study and various other commitments which seem to eat up what little spare time I seem to have.

I am very grateful to the support of my fellow members of the Executive during this time but, due to these various commitments I have not

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been able to do as much as I would have liked to in the role of Secretary.

As a group though we have achieved a great deal and our membership offering has again increased, this time to include additional online resources:

- The forum enables our members to share ideas, communicate and discuss issues that affect the profession. A big thank you is to **Scott Sammons** and **Nicholas Cooper** for their efforts to get the forum fully functioning on our Website.
- The wiki is a great addition to our online resources and **Reynold Leming** deserves a huge pat-on-the-back for his work on this project.
- The podcasts, created and supported by **James Lappin** (who also deserves a huge thankyou) are a really rich source of information, news and developments on a wide variety of information related subjects and are proving quite a hit.

In addition to new online resources, we're in the process of establishing new groups (thanks to the efforts of **Emily Overton**) and on the cusp of delivering another excellent conference (big thanks to **Rob Hutton**).

The reason that I highlight all of this is to emphasise the value of IRMS membership but also to emphasise how valuable your role is as a member of the Society. The IRMS is made up by members, for members; your attendance at group meetings and Conference, your engagement in our online communities and the many other ways in which members contribute to the Society makes ours a community that I am proud to be part of and one that is different to the various other professional membership groups that exist.

The other reason is that the strength of the Society very much depends upon the engagement of our network of information specialists and

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professionals and the ability of the society to continue to serve those communities. >>>>>

This is no easy challenge as the variety of professional disciplines becomes ever more complex and diverse, the availability of information and resources continues to grow and the pressure of work gets ever greater.

So, this is something of a call to arms, an encouragement to get involved either with your local or special interest group, with the online communities or as a member of the Executive Committee (perhaps as an officer if the prospect of a Director role is too daunting). However you become involved, being involved is what's important.

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**Table 1. IRMS Membership** as at 31st December 2013

	No. at 01/01/2013	No. at 31/12/2014	Change +/-
Individual	549	609	+60
Corporate	319	320	+1
Corporate Affiliate	0	1	+1
Corporate Honorary	0	1	+1
Honorary	18	18	0
Honorary Fellow	0	4	+4
Affiliate	8	14	+6
Student	62	77	+15
Subscription	2	2	0
<b>Total</b>	<b>958</b>	<b>1025</b>	<b>+88</b>

Includes unpaid membership at 05/02/2014. Individual 115, Corporate 212, Affiliate 1

**Table 2. Breakdown of members by country**

Membership Breakdown - all Active inclusive of not paid 2014	UK (Inc NI)	Europe (inc ROI)	Rest of the World	Total = 1025
Corporate Affiliate / Honorary	1		1	2
Corporate	288	29	3	320
Individual	535	35	39	609
Affiliate	14	1		15
Student	36	30	11	77
Subscription only			2	2

# Treasurer's Report

Meic Pierce Owen · treasurer@irms.org.uk



**2**013 saw the Society build on financial foundations set in previous years and continue to increase its income, control its costs and, for the first time since 2009, make a clear and healthy operating surplus. In this report, I shall look at our 2013 financial performance under the following headings:

- Income
- Costs and expenditure
- Plans for 2014
- Closing comments

## Income

As outlined in previous annual reports, our income is derived from three main areas. These are membership fees, advertising and, for the third year running, a surplus from Annual Conference.

Looking at each in turn, membership income realised in 2013 was again up on the 2012 figure and now constitutes, based on 2013 expenditure levels, sufficient income to in itself fund the year-round core operations of the Society.

Advertising income again showed an increase on that generated in 2012. This represents a solid performance in terms of Bulletin advertising augmented by a strong showing from the JobTarget recruitment page introduced to the Web site last year.

Thirdly, Conference. This proved particularly successful financially in 2013 with a surplus of over £15,000 being added to the Society coffers,

and this without significantly increasing delegate and exhibitor fees.

Finally in terms of significant sums, monies paid in respect of Group event sponsorship are included within our income as are revenues from joint-venture training events. Looking at the former, 2013 saw around £3000 received, mostly in respect of Public Sector Group sponsorship while a joint-venture training course staged by Tribal saw the Society net around £1500.

## Costs

Turning to spending, I am again happy to again report either reduction or stability across the board when compared with last year. This is in part a result of reduced Society and Conference Admin costs negotiated at time of contract review in 2012. It is also due in part to continued prudent and managed spending on the part of the Executive.

As Treasurer, it is pleasing also to note that the process of rationalising the ancestral aged debt is now complete with the Executive-approved write-off of £1.4k as included within the accounts marking the end of the process.

## Plans for 2014

Now that Kingston-Smith Association Management (KSAM) are familiar with our financial requirements, it is planned to introduce a simple service level agreement over the course of the spring and early summer. This will see them delivering the majority of day-to-day work under a system of Treasurer overview and approvals.

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## Closing remarks

2013 was a good year for the Society financially. Foundations laid in previous years allowed us to take full advantage of the opportunities for financial progress presented to us by both our new Society and Conference management partners.

In this, I would like to thank all at both KSAM and Revolution Events Management for their excellent work, but most especially those with whom I work most closely: Gaby, Pavlina, Suzanne and Charlotte at KSAM and Nick, Emma and Debs at 'Rev'.

2013 also saw the Society generate additional income in a number of ways.

Looking across 2014 and beyond, I see no reason why our financial progress cannot

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continue. Our core income streams appear solid, our income realisation is strong, our Conference business model is robust and we have good management partners for both Society and Conference administration.

Added to this, our running costs are controlled.

Accordingly, I am happy to close with the statement that I believe we have every cause to be optimistic about our financial prospects for 2014.

**T**he role of Conference Director is an ongoing one, the time I devote to the Society is almost exclusively concentrated on planning and organising the Conference. There is the old Chinese proverb "may you live in interesting times" and I can certainly say the build up to the 2013 conference was interesting in the extreme. There was a change in management company from Benchmark to Revolution Events Ltd, but I am pleased to report that the event was a successful one, which generated both a small surplus and overwhelmingly positive feedback.

A post-conference feedback session took place between the conference sub-group and our event company, in which we de-constructed the event, identifying what went well, what we could have done

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better, and what did not work at all. This has enabled us to go into the 2014 event with some clear ideas of how to improve and grow.

# Conference Director's Report



Rob Hutton · conference@irms.org.uk

Planning for 2014 event got under way in late July, the theme for the Conference is Luxury or Necessity. One of the key things we did change this year, and which has helped enormously with the planning, was the way in which we sent out

**Although most of the work this past year has been on planning the 2014 Conference, we have not been idle in looking at the future Conferences.**

the call for papers. First of all we listed 10 key topic areas, taken from some of the suggestions on feedback forms and also some key themes of facing the profession. The aim was to be able to focus the sessions and help us organise them more effectively. We also asked each speaker to provide learning outcomes to support the Continuous Personal Development initiative. This has worked particularly well and I think as a result we have put together a strong programme once more for 2014, with speakers and delegates booked from all over the world.

Although most of the work this past year has been on planning the 2014 Conference, we have not been idle in looking at the future conferences. As such, we have already booked the venue for 2015 and have sorted a venue for 2016. We are also looking to get venues identified for beyond 2016. The aim is to put in place a long-term plan of action to ensure that the IRMS Conference can go from strength to strength.

As of writing this report, we are ahead of all the targets we have set for 2014. For the first time in a few years I have not got that last-minute panic feeling. This has to be thanks to all the hard work of everyone involved in the planning and delivery including my colleagues on the executive and also the guys at Revolution Events, who once again have done a fabulous job – and not to forget our Gold Sponsor - Iron Mountain and Silver Sponsor – Box-it, who have given us amazing support over the past few years.

**If you want to see anything at the Conference or get involved with the planning for the future then please let us know, fresh ideas are vital to keep the event growing.**

As always to finish... the Conference is primarily aimed at the members of the Society and therefore my annual call to arms still holds true. If you want to see anything at the Conference or get involved with the planning for the future then please let us know, fresh ideas are vital to keep the event growing.

# Training and Development Director's Report

Paul Duller · training@irms.org.uk



**D**uring 2013/14, the IRMS ran a highly successful 'Information Governance for Local Authorities' training course as well as providing training on 'The importance of Information Governance' to the British Red Cross. In addition, a new IRMS 'Records Management for Schools' course based upon the 'IRMS Toolkit for Schools' has been developed and is due to be launched at Conference in May 2014. All of these courses have been developed in partnership with the Tribal Group plc.

(Please note that the IRMS is in the process of developing closer relationships with a number of specialist training providers, including Tribal, TFPL and AIIM, in order to deliver value-added services to IRMS Members).

## Accreditation

During 2013/14, the Accreditation Panel updated and streamlined the accreditation process. A simplified accreditation process and supporting application form is due to be re-launched at the 2014 IRMS Conference in Brighton. Additional marketing and communication work has also been undertaken in order to raise awareness of IRMS Accreditation within our membership.

The IRMS Accreditation Panel has met with representatives of the Knowledge Council to discuss the application of the IRMS Accreditation Programme to all staff working in Government Records Management functions. While these

discussions were ongoing at the time this report was written, we hope to be able to announce their results of their deliberations shortly.

In order to ensure that the IRMS Accreditation process is a success, we need our members to embrace this scheme, so brush up your CVs and submit your application forms as soon as possible.

## CPD Certification

This year the IRMS Annual Conference will be Continuous Professional Development approved. Feedback from conference attendees and members on this will be invaluable as the IRMS are considering applying for Continuous Professional Development certification for all regional and special interest group meetings and training courses.

## Mentoring

An Accreditation and Development Subcommittee has been established, and is in the process of developing a mentoring scheme for launch at the IRMS Conference 2014. The subcommittee intend to identify and profile a pool of willing

mentors and then formally offer an IRMS 'mentoring' service to members in the September 2014 edition of the bulletin.

## Other projects

The IRMS Training and Development Director has taken the lead in a number of IRMS initiatives, including the development of the new format 'Bulletin' and the creation of a comprehensive digital archive and searchable, full-text database of all IRMS Bulletins.

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# Marketing Director's Report

James Beale · marketing@irms.org.uk



**M**uch of my time over the past 12 months has been focussed, as usual, on the marketing of the annual IRMS Conference. This year has been our first full period of working alongside Revolution Events, with them having come on-board halfway through the lead up to last year's Conference.

With more time and resources on our side this year, the marketing of this year's Conference has been planned and executed in a more controlled manner in comparison to last year which was somewhat hindered by the changeover between event management companies. With the general theme of the Conference decided upon, I brainstormed various ideas in order to come up with a visual identity for the Conference. The theme of 'luxury or necessity' allowed for plenty of creative freedom. However, the final identity decided upon was one of thought-provoking simplicity and has been well received. This visual

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identity has been deployed across all marketing channels for the Conference, including social media and industry publications, and resulted in a strong unified branding for the event.

Another task undertaken specifically for the Conference was the restructure of the Conference

area of the IRMS Web site. This restructure was performed for a number of reasons; to improve navigation and visibility of the different areas of the Conference Web pages, to improve exposure of exhibitors and sponsors to delegates by creating

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individual profile pages for each, and to improve the visibility of the pages on search engines by creating pages focussed around the theme and topics of the Conference. This has resulted in a more streamlined and information-rich Conference area of the IRMS Web site.

We also restructured the Conference flyer this year, making it less than half the physical size of previous years' flyers, reducing both printing and mailing costs, and instead prompting potential delegates to go to the up-to-date, information-rich Web site.

Outside of the marketing for the Conference, I have looked at the ways in which revenue opportunities can be maximised through both online and offline marketing channels, primarily the IRMS Web site and the Bulletin publication. A media pack is in development to deploy these opportunities to potential advertisers and sponsors.

We have also developed a series of new IRMS membership and award-winner logos. These will be deployed imminently with a view to both individual and corporate members using them in order to display their affiliation with the Society and awards they have won.

# Groups Director's Report

Emily Overton · groups@irms.org.uk



**T**he last year has been an interesting year for me and incorporated in that year has been a job change in which I give my thanks to the new IRMS Jobs Board. Also during the last year my activities have included:

## Conference

I have been assisting the Conference Director by leading the Delegate Experience team for the second year running along with being on the Conference sub-committee.

## Groups

During the last year I have been working with the Group chairs to increase the correspondence and connection between the IRMS Executive and the Group Chairs. I have been working to increase the finance of the Groups via sponsorship and have been giving tips and suggestions on increasing meetings. This has included supporting the Public Sector Group (PSG), which has run for over 10 years with three to four meetings a year and also increasing the request for sponsorship to make the meeting fully self funded. The last year also saw Elizabeth Barber, Group Chair of PSG receive a gift for our appreciation for being Group Chair for 10 years.

I have been working with Groups to organise group meetings ahead of time with the goal of, at some point, being able to provide Continuous Professional Development for the Group Meetings as well as increase attendance from each group; however, this does require a lot of work.

The Group Chairs and I have continued to meet via conference call in February, July and October and we meet face-to-face at Conference.

The Groups I am currently heavily supporting are IRMS Wales, North and IOM. I am also in discussions to set up an IRMS Health group.

I have also attended the Public Sector, Midlands and North group meetings.

## NADPO

During the last 6 months I have been speaking with the Chairman of National Association for Data Protection and Freedom of Information Officers (NADPO) to make connections. I have so far attended two meetings and will be speaking at their next on 3 June in my own capacity. I have invited the Chairman to attend a group meeting of his choice.

## ICO Conference

I attended the ICO Conference on behalf of the society and tweeted from the event. I have made connections with the ICO and the IRMS will be having a stand in the marketplace at their Conference in 2015.

## Twitter

For the last year I have been on the @IRMSociety account. When I took over the account, it had laid dormant for many months and had less than 50 followers. Every event I go to, I tweet with a hashtag and try to involve as many as possible in the events. The account now has 538 followers. My thanks go to Scott and Fiona for their equal help in our crusade to boost our social media following.

I am also now working to create twitter accounts for the group chairs so that they can tweet from a professional account instead of personal accounts. The test account has been @IRMSIre, which is for the IRMS Ireland Group. This will be up and running shortly.

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# Communications Director's Report

Fiona Kearney · info@irms.org.uk

**I** was selected as a Director of the IRMS at the AGM in May 2013. I would like to thank **Alison North** and **John Wilson** for nominating me for position of Director. I have been involved with IRMS since 2010 and I was Membership Officer for the Ireland group between 2010 and 2012. I would also like to thank my employer Synercon Europe who support my contribution to IRMS.

After meeting the Executive at the IRMS Conference in Brighton, I attended the Strategy Meeting in Bristol in July where I got my first take of Executive work. I took up the position of Communications Director at this meeting. In this role I have developed a Communications Strategy for the IRMS. This Strategy was presented at the Executive meeting at the October meeting and came into effect in December 2013.

The Strategy sets out how the IRMS communicates with members, with the wider community and internally within the Executive. The Strategy sets out how we communicate with

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our members via existing medium such as social media and blogs. It also identified new ways in which we communicate with our members, such as newsletters. I am currently finalising a newsletter format and template which the IRMS will be using to communicate with members.

I have also been involved in various other projects within the Executive. I have been involved in an Advocacy Project with **Nicholas Cooper** and **Reynold Leming** and in the development of a student-focused Bulletin with **Paul Duller** and

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**I am currently finalising a newsletter format and template which the IRMS will be using to communicate with members.**

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**Scott Sammons.** I have also been working with **James Lappin** on the excellent IRMS Podcasts that he hosts on behalf of the Society. We are working on transcripts of the podcasts for members.

I have also represented the Executive at the IRMS Ireland Group meetings and IRMS Public Sector Group meetings. It is always great to meet the members of the IRMS at these events and to discuss any issues they have.

I look forward to continue working for the benefit of members in the coming year. If anyone has any questions, comments or thoughts on how we can improve communications or any aspect of the Society, please do not hesitate to contact me.

# Content Director and Immediate Past Chair

Matthew Stephenson · info@irms.org.uk



**D**espite stepping down as IRMS Chair in May 2013, I have remained on the Executive Committee as the Immediate Past Chair. This is a position without a vote and in theory I would have been able, had I wished, to do nothing. Despite this I was very keen to do something and so at the Executive Committee annual strategy meeting last summer I offered to take responsibility for content, becoming Content Director but still without a vote. I have worked closely with **Fiona Kearney** to define the difference between the remits of the Conference Director and the Content Director and then for six months rested on my laurels a bit... unfortunately due to other commitments (such as work, which does have a pesky habit of getting in the way of IRMS stuff!)

This year I have been working closely with **Scott Sammons** who since the summer has been our e-Officer, effecting a transfer of responsibilities as he moves on to bigger and better things in the Society. Over the spring I will be taking on the content related responsibilities that the e-Officer has been responsible since the creation of the post some 2 years or so ago.

As well as my Content responsibilities, I have also been part of the group working with **Rob Hutton**, the Conference Director, on the delivery of Conference and on the Accreditation Panel with **Paul Duller** and **Rachael Maguire** reviewing accreditation portfolios and reviewing the accreditation arrangements for the future.

After 4 years being Chair, this has been a refreshing change and while not quite a year off, it has certainly involved fewer responsibilities and less stress!

The Society is dependent on a number of service providers in delivering our key products, the Bulletin and the Web site. Our thanks go to Tribal, Hargrave Design, **Germanicus Hansa-Wilkinson**, PK InPrint and Webfooted Designs. Particular thanks to **Emily Tarrant** and **Jamie Burton** for their work above and beyond the call of duty in ensuring the stuff we provide to our members is as professional and timely as possible.

Many thanks for your help.

## Private Sector Development Officer

Roger Poole · membershipdev@irms.org.uk

**A**s private sector development officer, my high level goal is to increase the number of IRMS members from the private sector. There are a number of ways to achieve this – many of which are dependent upon other officer's within the IRMS eg marketing.

To this end I have undertaken the following during the last year:

- Attended meetings of the Financial Services Records Management Forum and worked with other IRMS Executive members to facilitate the promotion of the IRMS at these meetings
- Attended British Standards Institute meetings and served on two committees relating to Archiving and Records Management and Legal Admissibility (in my personal/professional capacity)
- Maintained my professional membership of AIIIM

# Groups Officer's Report

Scott Sammons · groups-officer@irms.org.uk



## Introduction

The Groups Officer role is charged with supporting the Group Director in overseeing and supporting the promotion and operation of the various community groups that the IRMS operates. During this reporting period I also took on overseeing the e-officer role, updates of which are in a separate report.

## Attendance of the Groups Officer at group meetings to support the chairs and update the groups on IRMS activity has increased.

## Groups

Attendance of the Groups Officer at group meetings to support the chairs and update the groups on IRMS activity has increased. With the e-officer role now sitting alongside the Groups Officer the Chairs and group members have benefited from having a direct route

through to updating their areas of the Web site, getting more content online and learning how to engage with our membership through our various technologies.

## New Professionals Award (NPA)

2014 award was announced in July of 2013 and has been advertised through various means throughout 2013 into January 2014. Publication of the NPA has increased on the 2013 award with exposure across various social mediums, University College London (UCL), mailing lists and contacts the IRMS has made. Application numbers were slightly down on last year; however, the process to appoint a winner is underway and the feedback on the standard of entries is already positive.

For the 2015 onwards, we are going to look at how other organisations structure their new professionals' services to see if there are lessons we can learn to enhance our current offering. New professionals and students are the profession's future, so if the IRMS can enhance its students offering, it can only benefit all our members (and indeed our profession) in the long run.

## Students

Once again the IRMS attended UCL in January to join a panel of professional bodies to speak with the students there on the role of professional bodies. >>>>>



- serving on its Education Committee
- Promoted the IRMS to colleagues, friends and RM vendors
- Attended IRMS strategy, committee and IRMS Conference meetings
- Commenced the review of the membership welcome pack to understand if any enhancements can be made to ensure it is viewed as appropriate for private and public sector members
- Worked with Forrester Research to build and develop the RM questionnaire sent to all members of the IRMS – I see this type of exercise as a valuable tool in helping to retain/attract members
- Commenced the development of a marketing campaign to widen the exposure of the IRMS and propose to work with the rest of the Executive to develop a high-level plan in order that we can coordinate our efforts and make the best use of our collective resources

>>>>> We were joined by ARA and Archives for London and had a lengthy panel discussion on the role of each body and how we can help the profession and our members.

Our work to strengthen our relationships with the universities continues and we now have an updated universities and colleges contact database. Hopefully next year we can continue our work to build closer ties with them and their courses.

### Industry engagement

I am currently in a 'discovery exercise' with the

Data Management Association (DAMA) UK on how IRMS and DAMA can work together on various initiatives and projects. Once I have something substantial to bring to the Executive we can discuss and see if this is something that IRMS wishes to follow up. DAMA and the IRMS share a lot in common, and although we represent to different professions (DAMA is for data managers and data architects) our issues around data and records are

the same. I am hopeful that this could be beginning of a prosperous relationship for both the IRMS and DAMA UK.

**I am currently in a 'discovery exercise' with DAMA UK on how IRMS and DAMA can work together on various initiatives and projects.**

## International Officer's Report

John Wilson · [international@irms.org.uk](mailto:international@irms.org.uk)



**T**he formation of the IRMS France Group was announced in October 2013. An inaugural meeting is planned later in the year. IRMS France are in discussion with the IRMS

Accreditation Panel to discuss ways forward on mutual recognition of certification/accreditation.

The chairs of the Ghana and Czech Republic groups have prepared individual reports on their activities.

IRMS and IIM Africa have agreed reciprocal membership. IRMS now has Corporate Membership of Institute of Information Management (IIM) Africa and in return IIM Africa

has been given Affiliate membership of IRMS. IRMS member **Ejeh Christian Oseni** attended IIM Africa's Inaugural Induction/Investiture Ceremony in Lagos, Nigeria on 15 March 2014 and collected the IRMS Corporate membership certificate. The IRMS Nigeria

Group has been dormant for the past two years and the decision has been taken to close this group and remove it from the list of active IRMS International Groups.

**David Bridge** represented the IRMS at a meeting of the Finnish Business Archive Association in Tampere, Finland in August 2013. In

September **Reynold Leming** attended a joint IRMS ARMA meeting with The State Archives Administration of China in London.

**IRMS now has Corporate Membership of IIM Africa and in return IIM Africa has been given Affiliate membership of IRMS.**

# Special Projects Officer's Report



Reynold Leming · projects@irms.org.uk

**T**he position of Special Projects Officer on the Society's Executive is now in its second year, having been established in mid-2012, with **Reynold Leming** continuing as the office holder. The primary effort has been focussed on the creation of the IRMS Retention Wiki.

This will be an open forum for the information and records management community to add and

**The wiki will be deployed using the open source MediaWiki toolkit. This was originally developed for use on Wikipedia.**

maintain retention rules for different record types. The wiki will be deployed using the open source MediaWiki toolkit. This was originally developed for use on Wikipedia. The Society is working on this project in conjunction with their web design company

Within the wiki, there is a page containing rules for each business function/activity. Each page will contain:

- Description of the business function
- Basis of retention and disposition (ie how you would determine the rules for records maintained by this business function)
- Retention rules per record type (a table containing within each row the record type, retention period and rationale)
- Citations (text of relevant statutes and links to useful resources)

Initially this focuses upon rules for the UK.

There is also an area containing articles.

Over time we would see this becoming an international resource and have the potential for added value articles on records management best practice. There is also the potential for generating advertising revenue for the Society from Google, Amazon or other sources.

At the time of writing, the design of the wiki is complete and initial content has been 'seeded'. Currently a process of peer review is being undertaken prior to the official launch at the IRMS Conference in Brighton in May 2014.

This is an exciting project for both the Society and the information governance world.

Additionally, the Special Projects Officer is developing a programme of works for advocacy. The Society has identified a number of organisations with which it wishes to engage for

**Currently a process of peer review is being undertaken prior to the official launch at the IRMS Conference in Brighton in May 2014.**

the purposes of 'advocacy', both in terms of promoting best practice in information and records management and in terms of promoting Society initiatives and membership offerings that would be mutually beneficial. We look forward to progressing this exciting activity in 2014 and beyond.

# e-Officer's Report

## Introduction

**T**he e-Officer role is charged with overseeing the running and development of all 'e-tools' that the IRMS utilises.

This includes the IRMS Web site, forums, mailing lists and social media. I am currently filling the e-officer until the content aspects are moved under the Content Director and the IT support aspects are moved to our IT provider. This role sits alongside my Groups Officer duties as they overlap given the groups use of the IRMS Web site.

## Web site changes

Various changes and upgrades have been completed for the Web site including the following:

Generally, changes have been made to the "join now" and renewals areas to make renewals and "join now" more visible to any visitor on the site. With the assistance from our Web site hosts we have also been able to ensure that at any point on the Web site someone can click "join" and be taken through the process. Updates made to the Web site so far include:

- <[www.irms.org.uk/about-us/awards](http://www.irms.org.uk/about-us/awards)> revamped and now looking towards having sub-pages that outline what each award is for and how you can qualify for it
- <[www.irms.org.uk/about-us/executive-committee](http://www.irms.org.uk/about-us/executive-committee)> now restored with images of the Executive and updated biographies
- <[www.irms.org.uk/about-us/officers](http://www.irms.org.uk/about-us/officers)> as above this has been restored with images and biographies

**We have also been able to ensure that at any point on the Web site someone can click "join" and be taken through the process.**

- <[www.irms.org.uk/groups](http://www.irms.org.uk/groups)> main page has been updated and all sub-pages for each group. Work is almost complete on biographies for the group chairs and now meeting documents are published under each group meeting.

• <[www.irms.org.uk/international](http://www.irms.org.uk/international)> has been revised to remove old information and ensure that queries are directed to the International Officer. We have also created a page for IRMS France, which can be found at <[www.irms.org.uk/international/irms-france](http://www.irms.org.uk/international/irms-france)>

## Public Sector

Elizabeth Barber · [public-sector@irms.org.uk](mailto:public-sector@irms.org.uk)

**S**ince the last annual report, the Public Sector Group has met three times in 2013 and has met once so far in 2014. The themes in 2013 were SharePoint, information assurance and records management in the 21st century. We have had enjoyed presentations from the Cabinet Office, The National Archives, In-Form Consult, Batchelor Associates and case studies from individual authorities. I would like to thank all our speakers for giving their time freely and to our sponsors, Automated Intelligence, TNT Business Solutions, Box-it and Apperception. All the meetings were very well attended, averaging between 50 and 60 members at each meeting.

- <[www.irms.org.uk/resources](http://www.irms.org.uk/resources)> has been updated to now outline all resources including the bulletin, LGCRS, guides and papers. So far under papers all the NPA award winners' papers have been uploaded

Blog use through the group chairs has increased and there is at least one blog update every 2 weeks. Some are more frequent than others; however, blog traffic is starting to increase. All blog posts are now communicated across the social media channels automatically.

Podcasts interface has now been launched and links from the podcasts system to the IRMS Web site. This means that podcasts will automatically be published on the IRMS Web site once released and will then be advertised across the IRMS social media communication channels.

**Podcasts will automatically be published on the IRMS Web site once released and will then be advertised across the IRMS social media communication channels.**

**What's coming**

Currently IRMS are looking into a forum for member use. We are currently in discussions with the Web site provider about trying to implement the "email response" feature, which means you can reply to email forum posts via email without having to log onto the forum each time. This would then closely match the email lists that proved valuable before being withdrawn. Once that feature is live we are ready to advertise to the wider membership – watch this space!

The Web site is also looking to be updated so that members can manage their account details and renewals more easier, including highlighting any changes in details and registering interests in hearing about their relevant local group.

The 2014 programme has been organised and there will be four meetings, which will fit into the overall theme of records management challenges in the 21st century. In February 2014, 50 delegates braved the tube strikes to attend the meeting on managing dark data and information governance in the cloud. The remaining meetings in 2014 will take place on 3 April, 17 July and 13 November.

We would like to thank all the delegates who have attended

the meetings and the sponsors for ensuring that the meetings take place and are well attended. I would like to thank **Jane Proffitt** and **Cerys**

**The 2014 programme has been organised and there will be four meetings, which will fit into the overall theme of records management challenges in the 21st century.**

**Ledger** for all their help in organising the Group. I would also like to thank **Emily Overton**, the Groups Director and **Scott Sammons**, the Groups Officer for all the support that they have given the Group.

# Scotland

Claire Johnson · [scotland@irms.org.uk](mailto:scotland@irms.org.uk)

**T**here have been two successful meetings held in the past year. The first was in June at Robert Gordon University (RGU), Aberdeen, where we found out about New skills, new perspectives and new networks: what 2013 has brought to the information & records management world'. The programme included an introduction to using

## **The programme included an introduction to using new networks (Knowledge Hub), the Oil and Gas Network and its qualification in Control Documents.**

new networks (Knowledge Hub), the Oil and Gas Network and its qualification in Control Documents. In addition two of the speakers reprised their presentations from the 2013 IRMS conference. The event was attended by 38 people (who were either members of either the IRMS or the LGA Knowledge Hub). The Group is very grateful to RGU for its unstinting support and hospitality.

The second event was a joint event 'Getting Our Act Together: Implementation of the Public Records (Scotland) Act 2011' (Glasgow 3 December 2013). It was a partnership event organised in collaboration with the Scottish Council on Archives, National Records of Scotland, Archives & Records Association (UK & Ireland), Information & Records Management Society, Archivists of Scottish Local Authorities Working Group and Glasgow Life.

These include recorded presentations, panel sessions, Q&As and speaker PowerPoint

## **The second event was a joint event 'Getting Our Act Together: Implementation of the Public Records (Scotland) Act 2011' (Glasgow 3 December 2013).**

presentations. The event was over-subscribed and so the Web site is an effort to provide all colleagues and stakeholders with access to the conference papers and debates.

Two members of the Executive (**Eleanor Rowe** from Moray Council and **Martyn Lockwood** from Dumfries & Galloway Council) left in August 2013 so our thanks are offered for their contribution. Four new members have been added to the group.

## Financial Services

Paul Finnis · [financial-services@irms.org.uk](mailto:financial-services@irms.org.uk)

### **At the time of going to print no report was received from the Group Chair.**

A meeting was held on the 5 December on 37th Floor, Canary Wharf Tower where the Group heard a presentation from The Content Group.

A further meeting took place on 2 April at HSBC where there was a presentation from Automated Intelligence.

# Ireland

Chris Manson · ireland@irms.org.uk

It has been another busy year for the Information and Records Management Society, Ireland Group. In April, Ken MacDonald the Assistant Commissioner at the Information Commissioner's Office, discussed the changes in EU Data

Protection Regulation and its impact on the UK, at our conference at Belfast City Hall. In June, in line with our traditional joint event with the Archive and Records Association (ARA) and the Irish Society for Archives (ISA), we assessed how we can work together looking at the management and access to

**It was proposed that the three organisations form a working group to examine historical medical records and act as a 'pressure group' in relation to Irish public policy.**

medical records, both current and historical. Out of this joint meeting it was proposed that the three organisations form a working group to examine historical medical records and act as a 'pressure group' in relation to Irish public policy. In November, reflecting on the many differing facets of modern records management, the Ireland Group hosted a meeting in Dublin focusing on an examination of the use of Microsoft SharePoint as the basis of an EDRM solution.

At our annual AGM, a number of changes to the Ireland committee took place. After three years,

**Looking to the future, our theme for 2014 is 'Information Theory, Data Protection and People' and events have been organised for the spring, in September.**

Dorothy Quinn stepped down as Chairperson. Dr Chris Manson who had previously acted as Secretary was appointed the new Chair and Sarah Hayes has moved to the Secretary role. Looking to the future, our theme for 2014 is 'Information Theory, Data Protection and People' and events have been organised for the spring, in September with the ARA, and a special joint conference with the Public Records Office Northern Ireland in November 2014.

# Wales

Kelly Jermin · wales-werim@irms.org.uk

**T**here has been no activity for the Wales Group this year however, 2014 has seen a new Wales Chair recruitment – Kelly Jermin.

Kelly is the Agency Records Manager at DVLA based in Swansea. She has been in her current role for just over 12 months and has worked in Information Assurance for 5 years. Kelly is keen to progress her role as chair and is looking forward to meeting other IRMS Chairs and members at the Conference in May.

# North

Tim Cotgreave · north@irms.org.uk

**N**o report was submitted at the time of going to press as a result of the resignation of the Group Chair, **David Mellalieu**, in early 2014. Our appreciation goes to David for all his hard work with the North Group and we look forward to him staying in touch. A new chair has been recruited by the name of **Tim Cotgreave** who will lead IRMS North with the support of the Groups Director.

# South West

Carl Cope · southwest@irms.org.uk

**S**eptember 2013 we held a meeting at Biotechnology and Biological Sciences Research Council (BBSRC) in Swindon and the theme was 'legacy data clean up'. The event was very well attended and we were sponsored by Oyster IMS.

Contributions for presentation included:

- Oyster IMS with '7 reasons for thinking about legacy data clean-up'
- BBSRC 'Emerging from the depths of darkness' with a Halloween theme

- Wiltshire Council presented 'personal drive shutdown' as part of the migration to SharePoint
- MRC 'The MRC records management policy and its implementation'

**Somerset Police ran a provocative game demonstrating how easy it is to lose data even when capturing at source.**

Somerset Police ran a provocative game demonstrating how easy it is to lose data even when capturing at source, by reading out people's names which the attendees wrote down. Very few got more than 50% right.

We finished with a 5-minute news roundup from:

- West Dorset District Council
- English Heritage
- Audit Commission

# Midlands

Matt Smith · [midlands@irms.org.uk](mailto:midlands@irms.org.uk)

## Introduction

**The Midlands Group promote cooperation and discussion between record managers across the region.**

This is facilitated by group meetings, we held three in 2013. Our members offer venues and we are lucky we are able to secure the use of facilities.

During 2013 we met in March, July and November. To include all members given cost of travel challenges we held meetings in the west,

**To include all members given cost of travel challenges we held meetings in the west, east and central parts of the region.**

east and central parts of the region. For content ideas and speakers we are dependent upon membership and in this regard we are not quite so fortunate – it can be difficult to get ideas and speakers despite frequent requests and when we do they can often be quite unique in nature, making it difficult to shape a session for the benefit of all.

## March meeting

Hosted by Shropshire County Council in Shrewsbury the meeting had three speakers including **David Bridge** from the IRMS Executive. Reasonably well attended and an interactive session.

## July meeting

Hosted by West Northamptonshire Development Council in Northampton we had three sessions

hosted by members including experiences of the Information Commissioner's Office visit and migrating records between departments. Well attended with new faces and an interactive session.

## November meeting

Hosted by Redditch Borough Council. Three sessions delivered by Group members, a fourth session to discuss a meeting with the North group in Q1 2014. Low numbers but good input from those present.

## Priorities

- Deliver meetings in 2014 with worthwhile number
- Include joint regional meetings in plan to provide bigger audiences and pool budgets

## Isle of Man

Bernard Toontas · [iom@irms.org.uk](mailto:iom@irms.org.uk)

**N**o report was submitted at the time of going to press by the **Group Chair**. There has been no activity for the Isle of Man Group for the last year. Initially there was plan to set a meeting for 27 January 2014; however, as a result of the heavy rain a lot of the Isle of Man was heavily flooded and the plan had to be cancelled. There was no financial outlay for this meeting.

# London

James Lappin · jhlappin@gmail.com

RMS London held six meetings last year as follows:

June 2013 – **Melissa Suek** gave a very entertaining talk on the relationship between ICT and Records Managers. Very well attended with PwC sponsoring and providing excellent catering (including wine!)

July 2013 – **Adrian Brown** provided a talk on practical digital preservation. The session was extremely well attended and some excellent questions and thoughts discussed.

September 2013 – An informative overview of the future of SharePoint was given by **Richard Jeffrey-Cook**. British Land providing sponsorship and catering. Unfortunately despite 'selling out' tickets, only half of those who booked turned up.

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**Adrian Brown provided a talk on practical digital preservation. The session was extremely well attended and some excellent questions and thoughts discussed.**

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**A very popular event which while it did not quite sell-out, had an excellence attendance on the night.**

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November 2013 – FOI Man, **Paul Gibbons**, came to speak to us about the ownership of information when it comes to FOI in an entertaining talk 'Whose records are they anyway'. A sell-out event with a good overall turnout.

February 2014 – IRMS's very own **Scott Sammons** provided a very thorough overview of the proposed changes in EU data protection. A very popular event (sold out) but unfortunately not everyone who booked places turned up.

March 2014 – eDiscovery and the future for Records Management. We invited three suppliers to speak about eDiscovery – **Josef Elliot** (Oyster IMS), **Rob Kenny** and **Lee Meyrick** (Nuix). A very popular event which while it did not quite sell-out, had an excellence attendance on the night.

# Ghana

Frank Boris-Hemans · fbheman@hotmail.com

**T**here was no formal meeting held in 2013, although members had two informal meetings in my office discussing concerns about the future of IRMS Ghana. No formal minutes were taken.

We had another group discussion in the latter part of 2013 and discussed how IRMS Ghana will fit

**Members resolved that being actively part of the Association as a sub international group, we could win more people into IRMS, Great Britain.**

into the newly to be formed National Association. The proposed name is Records and Archives Managers Association of Ghana. Members agreed that we will still keep the IRMS Ghana group as a sub group within the National Association, and we

will pay dues to them as an affiliate group. It will also be the only international group within the National Association so far as IRMS Ghana is concerned. Members resolved that being actively part of the Association as a sub international group, we could win more people into IRMS UK. One strategy is to begin sharing some of the old IRMS Bulletins to members of the Association, and also periodically announce impending events taking place in IRMS London.

## **Challenges**

Payment of subscriptions is not encouraging as bank transfer charges is expensive and deters people from joining. We are exploring the possibility of a more convenient manner to transfer funds through international banks directly to the IRMS account, and create a model for international subscription transfers, not just for Ghana.

We hope that things will improve this year, having finally dealt with our election petition in court.

# Accounts for the year ended 31 December 2013

## Information and Records Management Society

Income and expenditure account for the year ended 31 December 2013

	2013	2012	2011	2010	2009
	£	£	£	£	£
<b>INCOME</b>					
Subscriptions	123,850	119,985	117,046	90,317	112,288
Sponsorship, advertising and meetings	225,152	239,155	175,551	198,320	192,746
Local Government retention scheme	-	-	5,000	-	-
Interest received	29	38	52	40	131
Other income	710	1,784	1,577	2,859	2,042
	<u>349,741</u>	<u>360,962</u>	<u>299,226</u>	<u>291,536</u>	<u>307,207</u>
<b>EXPENDITURE</b>					
Administrative and office equipment	39,310	38,720	33,705	49,092	51,833
Bulletins and newsletters	58,553	67,742	53,080	53,246	64,423
Mailshots	-	-	350	450	2,753
Groups	5,269	7,084	-	-	-
Local Government retention scheme	-	-	2,500	-	-
Postage	3,322	7,380	6,178	3,518	5,922
Stationery	1,795	3,577	1,346	1,620	1,863
Telephone	228	-	-	-	-
Gifts	-	192	-	-	-
Officers expenses	9,092	-	9,203	4,559	648
Training costs	2,425	1,865	-	-	-
Accountancy fee	1,200	1,700	1,200	1,200	1,440
Bank charges	1,599	2,764	1,952	1,079	868
Meetings	-	-	-	1,743	1,369
Annual conference	192,569	215,984	192,036	217,588	191,876
Exhibitions	-	2,500	-	-	-
Web site	7,245	9,485	8,499	10,843	11,698
Travelling and accommodation costs	997	3,737	-	-	-
Insurance	557	1,907	1,306	34	1,658
Legal fees	-	375	35	35	90
Professional fees	4,339	-	-	-	-
Donations	-	100	-	-	-
Bad debts	(1,372)	3,895	6,716	-	-
Miscellaneous expenses	104	350	585	3,026	988
	<u>327,232</u>	<u>369,358</u>	<u>318,691</u>	<u>348,033</u>	<u>337,429</u>
<b>(DEFICIT)/SURPLUS BEFORE TAXATION</b>	<b>22,509</b>	<b>(8,395)</b>	<b>(19,465)</b>	<b>(56,497)</b>	<b>(30,222)</b>
Taxation	-	-	11	8	27
<b>(DEFICIT)/SURPLUS FOR THE YEAR</b>	<b><u>22,509</u></b>	<b><u>(8,395)</u></b>	<b><u>(19,476)</u></b>	<b><u>(56,505)</u></b>	<b><u>(30,249)</u></b>

It is anticipated that the Society will be liable to Corporation Tax on bank interest received and provision has been made.

## Information and Records Management Society

Balance sheet as at 31 December 2013

	2013	2012	2011	2010	2009
	£	£	£	£	£
<b>CURRENT ASSETS</b>					
Trade debtors	390	5,194	27,233	66,664	161,302
Prepayments	20,561	4,683	23,275	9,777	59,673
VAT repayable	11,438	14,307	-	8,018	5,351
Accrued income	39,788	-	-	-	-
Cash at Bank and on Deposit	111,515	54,300	144,755	64,475	84,497
	<u>183,692</u>	<u>78,485</u>	<u>195,263</u>	<u>148,934</u>	<u>310,823</u>
<b>CURRENT LIABILITIES</b>					
Creditors and Accruals	103,882	21,184	126,032	63,754	168,394
VAT payable	-	-	3,524	-	-
Taxation	-	-	11	8	752
	<u>103,882</u>	<u>21,184</u>	<u>129,567</u>	<u>63,762</u>	<u>169,146</u>
<b>NET ASSETS</b>	<b><u>79,810</u></b>	<b><u>57,301</u></b>	<b><u>65,696</u></b>	<b><u>85,172</u></b>	<b><u>141,677</u></b>
<b>GENERAL FUND</b>					
At 1st January 2013	57,301	65,696	85,172	141,677	171,926
(Deficit)/Surplus in the year	22,509	(8,395)	(19,476)	(56,505)	(30,249)
<b>As at 31st December 2013</b>	<b><u>79,810</u></b>	<b><u>57,301</u></b>	<b><u>65,696</u></b>	<b><u>85,172</u></b>	<b><u>141,677</u></b>

I approve these accounts and confirm that all relevant records and information for their preparation have been made available to Kingston Smith Association Management, who control the day-to-day running of the Society.



**Meic Pierce Owen, IRMS Treasurer**

Date: 28 March 2014

### ACCOUNTANTS REPORT

We have prepared the accounts for the year ended 31 December 2013 from the records and explanations supplied to us by Kingston Smith Association Management.



Cannon Moorcroft Limited, 3 Manor Courtyard, Hughenden Avenue, High Wycombe, Buckinghamshire, HP13 5RE

Date: 31 March 2014

