

# The National Records and Information Officers' Forum 2010

Essential Strategies for Implementing Business Aligned  
Recordkeeping Practices within Your Organisation

Liquid Learning is delighted to present the National Records and Information Officers' Forum 2010. This outstanding professional development and networking opportunity explores the latest advancements in records management, digital preservation and information management.

## FEATURED SPEAKERS

**Senator Kate Lundy** Parliamentary Representative on the Advisory Council  
for the National Archives Australia  
**Australian Labor Party**

**David Moldrich OAM** Manager, Global Knowledge Systems  
**Fosters Group**  
Chair, IT/21 Committee  
**Standards Australia**  
Chair, ISO RC46 SC11  
**International Standards Organisation**

**Amanda Harris** Director, Records and Information Management, Corporate  
Systems Branch  
**Department of Education, Employment and Workplace Relations**

**Joanna Baker** Assistant Director, Information and Document Management  
**Attorney General's Department**

**Alyssa Blackburn** Assistant Director, Records Management, Property and  
Services, Corporate Services  
**Comcare**

**Melinda Robinson** Manager of Freedom of Information Coordination  
**Department of Justice, Victoria**

**Ross Buchanan** Director, Health Information Services  
**Alfred Health (The Alfred, Caulfield Hospital and Sandringham Hospital)**

**Maia Ablett** Senior Advisor, Privacy and FOI Policy Branch  
**Department of the Prime Minister and Cabinet**

**Andrew Waugh** Senior Technical Advisor  
**Public Records Office Victoria**

**Kylie Dunn** Manager, Information Management and Library Services, Business  
Services Group  
**Roads and Traffic Authority, New South Wales**

**Jennifer Padman** Data Management Lead, Network and Space Systems  
**Boeing Defence Australia**

**Rowena Loo** Senior Research Analyst, Policy and Research  
**Queensland State Archives**

**Mal Mackisack** Manager, Systems and Records  
**APA Group**

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28 & 29 April 2010  
Rydges Melbourne Hotel

## EXPLORE

- Achieving Effective Recordkeeping Practices through Embracing Change
- Aligning Recordkeeping with Business Practices for Organisational Efficiency
- Explore Future Directions in Digital Recordkeeping and FOI
- Establishing Practical Record Management Frameworks and Standards

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**8.30 - 8.55 Registration and Morning Coffee****8.55 - 9.00 Official Welcome and Opening Remarks from the Chair****9.00 - 9.30 OPENING KEYNOTE COMMENTARY****Records 2.0**

The emerging Government 2.0 agenda is presenting many new opportunities for government departments and agencies to leverage online tools and crowdsourcing methods to better deliver services and co-design new directions. Senator Kate Lundy will speak about the Government 2.0 agenda, some basic policy and technical foundations, and how it relates to digital records management and archival. She will explore some of the challenges and opportunities around ensuring sustainable access to data, as well as the challenge of managing the integrity of digital assets whilst creating online access to the general public.

**Senator Kate Lundy** Parliamentary Representative on the Advisory Council for the National Archives Australia

**Australian Labor Party**

**9.30 - 9.45 Questions and Discussion****9.45 - 10.30 CASE STUDY****Embedding Recordkeeping in Business Practices**

Effective recordkeeping requires a whole-of-organisation approach. The Attorney General's department has aligned recordkeeping strategies with business practices to simplify the recordkeeping process and improve overall business compliance. This session will discuss:

- How to embed a recordkeeping mentality within your organisation
- Aligning recordkeeping with current business practices
- Ensuring records compliance

**Joanna Baker** Assistant Director, Information and Document Management

**Attorney General's Department**

**10.30 - 10.45 Questions and Discussion****10.45 - 11.00 Morning Tea****11.00 - 11.45 CASE STUDY****Recordkeeping by Stealth**

The Department of Education, Employment and Workplace Relations is currently creating their own document management system in order to simplify the recordkeeping process and increase compliance. By integrating SharePoint with TRIM, the new system will automatically save information as records, minimising user awareness of the recordkeeping process but simultaneously increasing whole-of-organisation compliance. This session will discuss:

- Advantages of invisible recordkeeping
- Simplifying the recordkeeping process to enhance compliance

- Integrating recordkeeping into standard business practices

**Amanda Harris** Director, Records and Information Management, Corporate Systems Branch  
**Department of Education, Employment and Workplace Relations**

**11.45 - 12.00 Questions and Discussion****12.00 - 1.00 Networking Lunch****1.00 - 1.45 CASE STUDY****Managing Information – The Role of Recordkeeping**

Since making the transition to electronic recordkeeping, Comcare has worked to further integrate their recordkeeping practices into the broader information management lifecycle. This has created a new awareness within staff as to the value of sound recordkeeping practices and how they fit within the larger information management strategy. Integrating these practices has also increased recordkeeping compliance at all levels within the organisation. Explore:

- How to integrate record management into information management
- The role of the record in the broader information management lifecycle
- Strategies to create organisational awareness and compliance

**Alyssa Blackburn** Assistant Director, Records Management, Property Services, Corporate Services  
**Comcare**

**1.45 - 2.00 Questions and Discussion****2.00 - 2.45 EXPERT COMMENTARY****Recordkeeping and Freedom of Information**

The Freedom of Information Act strives to ensure easier public access to documents held by government agencies. In making these records available upon request, Freedom of Information Officers' work closely with government Records Management Units in releasing certain information. This session will discuss:

- Overview of FOI
- The relationship between recordkeeping and the FOI
- Maintaining privacy in relation to FOI requests

**Melinda Robinson** Manager of Freedom of Information Coordination  
**Department of Justice, Victoria**

**2.45 - 3.00 Questions and Discussion****3.00 - 3.15 Afternoon Tea****3.15 - 4.00 CASE STUDY****Recordkeeping Awareness - Queensland State Archives**

The change from the Freedom of Information Act to the Right to Information Act has brought sweeping reforms to the management of government information in Queensland. This transition has also increased awareness within public authorities and across the community of the importance

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of effective recordkeeping practices. Queensland State Archives has undertaken a range of projects to assist public authorities in managing the transition to the new information management environment. In September 2009, a "Recordkeeping Awareness Program" was introduced to disseminate the message about the importance of recordkeeping to the Queensland Public Sector at large. A concurrent training program was launched to educate Public Sector employees about their recordkeeping obligations, and the benefits of maintaining high recordkeeping standards. This session will cover:

- Why recordkeeping is everyone's responsibility
- Educating public authorities about the importance of recordkeeping
- How effective recordkeeping underpins the Right to Information reforms in Queensland

**Rowena Loo** Senior Research Analyst, Policy and Research

**Queensland State Archives**

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4.00 - 4.15 **Questions and Discussion**

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4.15 - 5.00 **EXPERT COMMENTARY**

### **Managing Converted Records**

From 2010 the new General Disposal Authority for Converted Records permits Victorian agencies to generally convert a record from one format to another and then dispose of the source record. The digitisation of physical records is one example of such conversion. The General Disposal Authority was developed in response to the new Victorian Evidence Act (2008). This session will cover:

- An overview of the use of converted records as evidence in Victoria
- A summary of the General Disposal Authority for Converted Records
- The conditions under which conversion is permitted (and prohibited)
- Specific processes to satisfy the conditions when digitising physical records

**Andrew Waugh** Senior Technical Advisor  
**Public Records Office Victoria**

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5.00 - 5.15 **Questions and Discussion**

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5.15 **Concluding Remarks from the Chair**

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5.15 - 6.30 **Networking Reception**

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8.30 - 8.55 **Morning Coffee**

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8.55 - 9.00 **Opening Remarks from the Chair**

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9.00 - 9.45 **OPENING KEYNOTE CASE STUDY**

### **Achieving Effective Business Management through the Implementation of Standards**

The implementation of standards in business is a critical tool for good information management. Good information management is also an enabler of good business practices. Drawing on his extensive experience, David will discuss:

- Attaining good information management practices
- How information management acts as an enabler to the business
- The impact of national metadata standards

**David Moldrich** OAM Manager, Global Knowledge Systems

**Fosters Group**

Chair, IT/21 Committee

**Standards Australia**

Chair, ISO RC46 SC11

**International Standards Organisation**

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9.45 - 10.00 **Questions and Discussion**

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10.00 - 10.45 **CASE STUDY**

### **Meeting the Change Management Challenge**

For many organisations, adapting to change can prove to be a major challenge. This is also the case in the recordkeeping industry, especially when the changeover involves introducing new technologies. Manager of Information Management and Library Services for the RTA, Kylie Dunn is currently in the process of implementing a change management strategy as the RTA prepares to implement an EDRMS. Drawing on her previous experience implementing an EDRMS and change management strategy with the Royal Australian Air Force, Kylie will discuss:

- Planning and preparing for organisational change
- Implementing an effective change management strategy
- Overcoming resistance to change

**Kylie Dunn** Manager, Information Management and Library Services, Business Services Group

**Roads and Traffic Authority, New South Wales**

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10.45 - 11.00 **Questions and Discussion**

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11.00 - 11.15 **Morning Tea**

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11.15 - 12.00 **CASE STUDY**

### **Commonwealth Reforms to Support Proactive Publication**

Reforms proposed to the Commonwealth Freedom of Information Act seek to create a culture of proactive publication, encouraging a more open and transparent means of accessing government records. Proposals to establish the Office of the Information Commissioner as an independent agency and to require agencies to

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# Creating Recordkeeping Awareness within an Organisation

establish proactive information publication schemes are key measures to meet the reform objectives. This session will highlight:

- How changes to Commonwealth FOI will improve access to Commonwealth records; and
- Challenges in making an effective proactive publication scheme, including identifying information where public interest lies

**Maia Ablett** Senior Advisor, Privacy and FOI Policy Branch  
**Department of the Prime Minister and Cabinet**

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## 12.00 - 12.15 Questions and Discussion

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## 12.15 - 1.15 Networking Lunch

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## 1.15 - 2.00 CASE STUDY

### A Whole-of-Organisation Approach to Recordkeeping

In making the transition to electronic recordkeeping, Boeing Defence Australia has also succeeded in creating greater organisational awareness of the importance of records. During the transition, a central archive register was made available on the company intranet providing greater awareness of the records kept and the functions they provided. This session will discuss:

- A company-wide approach to recordkeeping
- Creating recordkeeping awareness in an organisation
- The role of the records team in creating an understanding about good records management

**Jennifer Padman** Data Management Lead, Network and Space Systems  
**Boeing Defence Australia**

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## 2.00 - 2.15 Questions and Discussion

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## 2.15 - 3.00 CASE STUDY

### Records Management to Compliment Organisational Developments

As organisations change and grow through mergers and acquisitions, this can have a huge impact on their recordkeeping practices. The transferred records they receive may be classified differently, may not come as a complete set, or be deemed unnecessary by the organisation receiving them. Drawing on his extensive experience within private sector recordkeeping, Mal will examine:

- Dealing with different classification schemes
- Taking over another entity's records
- Acquiring unnecessary records

**Mal Mackisack** Manager, Systems and Records  
**APA Group**

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## 3.00 - 3.15 Questions and Discussion

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## 3.15 - 3.30 Afternoon Tea

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## 3.30 - 4.15 CASE STUDY

### Digital Record Scanning - The Next Step in Hospital Medical Recordkeeping

Melbourne's Alfred Health is currently embarking on a health service-wide medical record scanning project as part of their strategy to replace hardcopy records with electronic files. In doing so, paper medical records are currently being scanned into a digital clinical system (Cerner), which is accessed online, making patient recordkeeping more streamlined, easier, and more efficient. In this session, Ross will discuss:

- Benefits of implementing a scanned recordkeeping system
- Managing records in a digital environment
- Administrative and clinical staff change
- Where to next? Future developments

**Ross Buchanan** Director, Health Information Services  
**Alfred Health (The Alfred, Caulfield Hospital and Sandringham Hospital)**

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## 4.15 - 4.30 Questions and Discussion

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## 4.30 Closing Remarks from the Chair and Close of Forum

## WHO WILL ATTEND

- Records and Information Officers / Managers
- EDRM / ERMS Project Officers
- Freedom of Information Officers
- Records and Information Managers
- Archive Managers
- Senior Project Officers in Records
- Records Coordinators
- Database Administrators
- TRIM Administrators
- Digital Information Officers in Records
- Library Services

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## Adapting to Change - The Role of the Records Manager

Recordkeeping is the foundation of all good businesses, and all good businesses need a strong foundation. In light of this, it is essential that the records management unit has effective strategies in place allowing them to prepare, plan, and adapt to change. Within the records industry change management seems like a daunting task, with many records managers unaware that if they become agents for change they can use it to their advantage to create and implement effective recordkeeping practices within their organisations. This full-day workshop delivers a practical approach to changes in records management delivering effective outcomes for your organisation.

### 8.30 - 9.00 Registration

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### 9.00 - 10.30 Preparing for Change

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- Understanding the need for changing systems and practices
- The challenges involved in implementing new technologies
- The cost of not changing

### 10.30 - 10.45 Morning Tea

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### 10.45 - 12.15 Effective Change Management Strategies

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- Successful approaches to managing change
- Creating the environment for change
- Planning for a whole-of-organisation approach to change

### 12.15 - 1.15 Networking Lunch

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### 1.15 - 2.45 Implementing Effective Recordkeeping Systems

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- Developing effective and successful recordkeeping systems
- Designing recordkeeping systems to meet business needs
- The role of records management professionals in the change process

### 2.45 - 3.00 Afternoon Tea

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### 3.00 - 4.30 The Records Manager as an Agent for Change

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- Leading the way – creating organisational awareness of good recordkeeping practices
- Delivering enhanced productivity through successful change
- Measuring the benefits of change

### 4.30 Close of Workshop

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#### EXPERT FACILITATOR:

**Conni Christensen** Director and Principal Consultant  
Synercon Management Consulting

Conni has over 15 years experience in the Australian information management industry. She is the Principal Consultant and a director of Synercon Management Consulting and heads a team of eight staff. Conni has many years of implementation experience with the major records management software products. Her knowledge of the industry and current products in electronic document management and recordkeeping systems is substantial. Prior to forming Synercon in 1998, she spent eight years working within the information management software industry. Conni is the designer and product manager for a.k.a.@ thesaurus and records retention software – a product now used by over 300 customers world wide. Conni is in high demand as a trainer, conference and workshop presenter on records and information management issues.

## ABOUT THE EVENT

Those within the recordkeeping industry understand that good records management is the foundation of good business practice. In supporting business practices, records and information managers need to take a proactive approach to information management, ensuring the records their organisation creates are managed effectively and efficiently. This is where the challenge lies, in creating successful organisation-wide approaches to dealing with records.

The National Records and Information Officers' Forum 2010 is designed to provide proven case studies and expert opinions on strategies for successful records management. It will foster a space for learning, development and the exchange of ideas on all aspects of records management. This interactive forum has the primary goal of helping those involved within the recordkeeping industry to be more effective in their role and in the recordkeeping practices they implement throughout organisations.

This event will provide practical value through case studies from leading Records and Information Management practitioners and valuable insights from experienced industry experts to enhance recordkeeping approaches, strategies and with successful outcomes.

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