"Bridging the Gap from Theory to Outcomes" *Volume 2, Issue 9, May-June 2008*

In This Issue

TIPS AND TRICKS

"Do you feel overwhelmed and frustrated by your long 'to do' list? These thoughts can drain your energy and actually prevent you from accomplishing all that you want. Instead of starting your day off feeling defeated, begin a new habit that will guarantee immediate gratification every day. Schedule a different 15 minute task every morning and do it first thing (wake up 15 minutes earlier than you normally do). The feeling of accomplishment you will get will set the tone and energize you for the rest of the day.

"**BONUS TIP**: Put individual quick tasks on index cards ahead of time and keep them in a recipe box; choose one from the front of the box each morning and place it at the back when you are done."

—Hellen Buttigieg, CPO,
TV Personality & Life Coach

Got a tip? Share a tip!
Send it to info@rimsolutions.ca and we'll include it in our next newsletter.

Where does the time go? So many things to do, yet so little time. *(Well, maybe.)* However, we can accomplish much with our time—and the more organized we are, the more we can accomplish.

A good records management program that is well conceived and well implemented can help us with our time management. For instance: How much of your workday do you waste looking for "lost" files? Or trying to stuff paper documents into overflowing file cabinets? Or purging email inboxes in exasperation after getting notification from IT that you've reached your quota? Why don't people just leave us alone so we can get our *real* work done?

Those that place demands on our time are not trying to make our lives difficult. The fact is that no one can function in a vacuum—those demanding our time are doing so because they need our assistance to meet their goals (as we need assistance from others to meet ours).

If you find yourself running out of time most of the time, possibly your organizing approach or your system(s) may need an overhaul! Good systems go hand-in-hand with good productivity. Organizational experts tell us that productivity impacts morale—happy workers are more productive workers. Are your systems enabling your productivity? Are you a happy worker?

There are only so many hours in a work day. It is not only what we do with those hours, but how we work during those hours that will either make our work fun or give us an ulcer. Choose fun.

Mary Colak, cmc

Privacy Technology Sees Limited Demand

Reprinted from Canadian HR Reporter: June 18, 2007, author: Alfred Tuitt.

Many private-sector businesses in Canada are no further ahead in the execution of privacy compliance initiatives, despite the introduction of federal and, in the cases of British Columbia, Alberta and Quebec, provincial privacy legislation.

Originally, it was thought government legislation alone would compel companies to seek an automated solution to privacy compliance. And for years software applications have been available to facilitate the timely implementation of corporate privacy compliance initiatives and reduce the cost and effort it takes to facilitate this best practice.

These applications provide a single place for companies to keep customers and employees informed about:

- their personal data;
- why the data is collected;
- who has access to the data;
- consents they have given and the consequences of changing these;
- where the data can be found; and
- how to lodge and follow the progress of a complaint.

The applications also provide company privacy officers with tools to help develop a corporate privacy policy or track the progress of challenges made by people keen to know about the personal information held by a company.

Most privacy compliance applications are designed so little or no training is necessary; clients and employees need only know their user name and password to access the system. Companies using the software also need not worry about maintenance or upgrades. Automation of privacy compliance, much like manager self-service and employee self-service in an HR application, can be a cost-effective alternative to manual, paper-based solutions.

In addition, privacy compliance applications contain no confidential information. They provide easy access and guidance via the Internet so customers and employees can verify what personal information a company is keeping and provide a way to manage their consents and lodge complaints.

But poor government enforcement, a split opinion of corporate legal advisors and a focus on data security have meant a limited demand for such applications. It seems that, in North America, privacy compliance has taken a back seat to data security. Maybe that's because of confusion between the two.

Data security, in addition to a disaster recovery component, deals with preventing sensitive company, customer and employee data in any format from being taken, accidentally or deliberately, from company premises without proper authorization. In a recent example, it was discovered that credit and debit card transaction information of millions of Canadian customers of Winners and HomeSense was stolen by hackers between 2003 and 2006 when they broke into the computer system of parent company TJX Cos. in the United States.

On the other hand, privacy compliance deals with how a company conducts itself in the collection, use and disclosure of confidential employee and customer data. Employees and customers have limited rights under federal and provincial privacy laws regarding what data a company has about them, why the company needs the information, how they will use it and to whom it may be disclosed.

See Privacy on page 3

Privacy, continued from page 2

One factor contributing to the lag in corporate privacy compliance has been the inability of the federal privacy commissioner to enforce the law. The commissioner does not have the power to levy fines against a company found guilty under the law, but can post the names of violators. So far, no companies have had their names posted and this lack of enforcement apparently has some companies taking a "wait and see" position.

Another goal of privacy law is to protect employers and employees from unauthorized collection of information when they are using a computer to check pay statements, for example, or surfing the Internet. Many sophisticated applications collect and track the personal information and habits of computer users and web surfers without their knowledge or consent.

Canadian companies are moderately aware of privacy legislation and its purpose. What's puzzling is why some employers are waiting for guidance from the government and legal advisors on this issue. Best practice would dictate that it's good business for a company to respect the privacy of its customers and employees.

Alfred Tuitt is a founding owner of HRWARE in Brampton, Ont., and played a role in the development of eConsent, privacy management software by eQuest Systems. He can be reached at atuitt@hrware.com or (905) 840-2521 ext. 101. ■

Get More Time in Your Day for Filing!

So many things to file, yet so little time!

Have you ever wondered how some people seem to accomplish so much while you seem to always be at the starting gate? Chances are good that the 'doers' are generally quite well organized. But that's only half the equation.

Besides having a place for everything and everything in its place, your records classification system has to *enable* your productivity. If it is hampering your productivity, consider why that is... Here are a few possible reasons:

- You don't know enough about the classification system—ask for training.
- You don't know enough about your organization's functions—talk to someone, read the annual reports, mission statement, vision statement, goals, objectives … anything you can get your hands on (including the file lists and records classification system!).
- Office does not have enough resources to maintain the system? Maybe the retention schedule is not followed and there's just too many files?
- There are no standards for filing (equipment and folders are individual choices)—ask for standards and training for the whole office.
- No one is in charge—ask who's in charge and make sure the policies and procedures are communicated.

After all that, maybe it just comes down to you taking on too much. This is when it all comes down to basic arithmetic. You can't add more time to a 24-hour day. But you can certainly add more time to your day by subtracting tasks that are not necessary.

TIP: Use your calendar to schedule *EVERYTHING.* Yes, *EVERYTHING.* This includes filing, phone calls, breaks, meetings, word processing tasks, etc. Then, when your calendar is full, that's it. You can't add more. But if you need to add more, then subtract something—perhaps delegate it or move it to another day where your schedule allows.

Whatever you do, make the most of your time. Not being organized wastes everyone's time. ■

Email Best Practices

Is it a record?

Sometimes subject lines (or email content itself) make it difficult to determine if an email qualifies as a "record" for the organization. A surprising number of people do not know how to write an accurate subject line let alone contain the content.

A well-written subject line can save time in helping determine if the email content is worthy of 'record' status. A record is generally defined as "anything upon which information is written and stored, regardless of media...and has value for the organization…." On that premise, an email can be a record for an organization *IF* it has value.

To help you determine if an email has value, look at its subject line. Does the subject relate to a business function of the organization? Can the subject be classified into the organization's records classification system? If it can be classified, does the content of the email add value to the subject? An invitation to lunch to discuss the organization's upcoming budget is not adding value…but the meeting discussion notes may certainly be valuable if they are summarized in an email as a follow-up.

Here are some general best practices to consider when sending email:

✓ Always give your email message a meaningful subject.

✓ Get to the point in the first paragraph.

✓ Keep your message short, simple, concise and relevant.

✓ Answer all questions and pre-empt further questions.

✓ Make your email personal (you are writing to a person, after all!).

✓ When replying, be sure to include the original email as part of the thread—this saves time and angst for the recipient.

✗ Never use email when a phone call would be better (apologies, confidential information).

✗ Do not send one phrase or one line emails—they clog up the mail system.

✗ Do not request delivery and read receipts.

✗ Do not ask to recall a message (by the time you do, it's probably too late anyway!). Better yet, think before you send.

✗ Do not use email to discuss confidential information

✗ DO NOT TYPE IN CAPTIALS. IT IS CONSIDERED TO BE SHOUTING AND IS GENERALLY CLASSED AS UNACCEPTABLE.

The above is a start … I'm sure you can think up many more guidelines to add to your repertoire of email best practices. ■

The 8 Deadly Sins of Email

(David Shipley & Will Schwalbe: "The Essential Guide to Email for Office and Home")

1. The email that's unbelievably vague. ("Remember to do that thing.")
2. The email that insults you so badly you have to get up from your desk. ("HOW CAN YOU NOT HAVE DONE THAT THING?!!!")
3. The email that puts you in jail. ("Please tell them that I asked you to sell that thing when it hit $70.")
4. The email that's cowardly. ("Here's the thing: you're being let go.")
5. The email that won't go away. (Re: Re: Re: Re: Re: Re: Re: Re: that thing.)
6. The email that's so sarcastic you have to get up from your desk. ("Smooth move on that thing. Really smooth.")
7. The email that's too casual. ("Hiya! Any word on that admissions thing?")
8. The email that's inappropriate. ("Want to come to my hotel room to discuss that thing?")

Leadership Development Reaching a 'Crisis Point'

Reprinted from Canadian HR Reporter: November 5, 2007, author: Shannon Klie

Leadership development is on everybody's lips, but when it comes to actually walking the talk, very little gets done and the situation is reaching a crisis point, according to the honorary chairman of the Canadian Society for Training and Development's Learn@Work Week.

"There's a huge number of experienced people leaving organizations and a sense that we haven't done enough to develop the leaders of the future," said Courtney Pratt, who is also the chairman of Hamilton-based steel manufacturer Stelco.

As part of Learn@Work Week in September, executives from public, private and not-for-profit organizations gathered at the National Club in Toronto to figure out why leadership development is one of the first things to be cut when an organization hits hard times, even though chief executive officers say it's a priority.

One of the answers that came out of the symposium was that leadership development isn't actually a top priority for executives. If organizations want to change that, executives need to be held accountable for making leadership development happen, said Pratt.

"If you want CEOs to take it seriously, you had better make it one of their objectives and you had better compensate them for it," he said.

While the shift in demographics raises the urgency to develop the next generation of leaders, the different generations also have different views of what a successful career looks like, said Pratt.

"Younger people coming into organizations put different values on different things," he said. "There's a need to consciously create a dialogue between the two groups. Too often the dialogue is one way. It's the old guard telling the young people, 'Here's how it works and here's the formula for success.'

Events such as Learn@Work Week and the leadership symposium raise awareness of learning as a valid business issue, said Pratt.

"Learning is a little bit like leadership. It's something we all recognize as important, but we're not doing enough. We're falling behind, we're not investing enough," he said.

Learning is a big part of the job at Novopharm, a Toronto-based pharmaceutical company. In addition to compliance, quality control and professional development training, every time a new operational process is introduced, employees involved in that process need to be trained, said Sheri Phillips, the company's manager of training and development. From January until the beginning of September, there were 150 process changes at Novopharm.

The company recently implemented a new online learning system with e-learning programs, which has saved the company about $60,000 in training costs in the past year, said Phillips, who also attended the leadership symposium.

The benefits of the new system extend beyond cost savings, said Phillips.

"We've been able to decrease the number of hours employees spend on training and yet make the training more interactive and engaging," she said.

Managers and supervisors can also easily search the system to find out if an employee has been trained on a particular process or compliance issue.

"There's more information and data available so they can manage their staff more effectively," said Phillips.

For more information about Learn@Work Week and about the Canadian Society for Training and Development, go to: http://www.cstd.ca/. ■

RECORDS AND INFORMATION MANAGEMENT RESOURCES

AIIM-The Enterprise Content Management Association—AIIM is the international authority on Enterprise Content Management (ECM) - the tools and technologies used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM enables four key business drivers: Continuity, Collaboration, Compliance, and Costs. www.aiim.org.

ARMA International—is a not-for-profit professional association and the authority on managing records and information – paper and electronic. www.arma.org.

Bitpipe.com—is the definitive guide to online resources for IT professionals. Provides information through technology white papers, webcasts, case studies and IT product information. www.bitpipe.com

British Columbia Corporate Information Management Branch—CIMB provides central information management services and support to ministries, Crown corporations and agencies within the Government of British Columbia. CIMB is responsible for government recorded information management policy, standards and procedures. www.mser.gov.bc.ca/CIMB/

Civic Info BC—Civic Info BC is a cooperative information service for those who work or have an interest in BC's local government sector. www.civicinfo.bc.ca

Gartner—global leader in technology-related research and advice. www.gartner.com

Forrester Research—Forrester Research, Inc. is an independent technology and market research company providing advice to global leaders in business and technology. www.forrester.com

IDC—International Data Corporation—get the latest trends, surveys and forecasts. www.idc.com

ISO—International Organization for Standardization—check out the latest information on ISO 15489, the world's first standard for records management. www.iso.org.

Library and Archives Canada—Library and Archives Canada collects and preserves Canada's documentary heritage, and makes it accessible to all Canadians. This heritage includes publications, archival records, sound and audio-visual materials, photographs, artworks, and electronic documents such as websites. As part of Library and Archives Canada's mandate, they work closely with other archives and libraries to acquire and share these materials as widely as possible. www.collectionscanada.ca

Local Government Management Association of BC (LGMA)—LGMA is a professional organization representing municipal and regional district managers, administrators, clerks, treasurers and other local government officials in BC. www.lgma.ca

National Archives and Records Administration (USA) (NARA)—Of all documents and materials created in the course of business conducted by the United States Federal government, only 1%-3% are so important for legal or historical reasons. These documents are kept by NARA forever. Learn about NARA's record keeping standards. www.archives.gov.

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UPCOMING TRAINING OPPORTUNITIES

OUR TRAINING SCHEDULE HAS CHANGED FOR 2008. PLEASE ADJUST YOUR CALENDARS!

Introduction to Records & Information Management
A one-day workshop covering the basics of RIM.
Victoria—September 9, 2008

Using ARCS, ORCS and LGMA
A one-day workshop teaching the basic skills needed to master ARCS & ORCS.
Victoria—September 11, 2008

Effective E-Mail Management
A one-half day workshop for Executives and others who want to get a handle on their e-mail. Demos & practical hands-on experience provided.
Victoria—October 2, 2008

Designing Records Classification Systems
A two-day workshop providing practical hands-on experience in developing file taxonomies.
Victoria—October 7-8, 2008

Planning & Implementing Your RIM Program
A two-day workshop providing the tools and skills needed for developing a RIM program within organizations.
Victoria—October 14-15, 2008

Converting Your File System
A one-day workshop demonstrating how to convert your office's old files to a new ARCS, ORCS or LGMA classification system.
Victoria—May 7, 2009

Preparing Records for Offsite Storage
A one-day workshop providing practical hands-on experience on how to prepare records for offsite storage.
Victoria—May 14, 2009

For more information and to register, go to:
www.rimsolutions.ca
Or call: 250-658-4873