



TAB Self Assessment Tool

How Environmentally Friendly is Your Records Management Program?

Today's businesses operate in a world that places increasing importance on protecting the environment. This growing environmental emphasis applies not only on the front lines of the natural resource, manufacturing and transportation sectors, but also in fields as diverse as law, consulting and information technology.

In fact, any business which consumes resources or occupies physical space has an environmental footprint. The good news is that there are direct business benefits associated with minimizing that footprint, including:

- Decreased risk of non-compliance with emerging regulatory requirements in the area of environmental protection
- Cost savings as a result of more efficient use of expensive resources
- Increased consumer and shareholder confidence as a result of more long-term sustainability

Go Green with RM

As a field dedicated to managing large physical and intellectual business resources, records management can play a key role in helping an organization realize these benefits.

Your organization's records management practices and choice of equipment and supplies can all profoundly affect your company's overall impact on the environment.

But how environmentally friendly is your company's records management program? Answering the questions in our needs assessment tool will help you determine this and help put your organization on the path to more environmentally-friendly management of recorded information assets.

The assessment looks at three areas:

- Life Cycle Practices
- Filing Equipment and Supplies
- Information Management Services

Note: This tool is intended to guide decisions and stimulate focused conversations about the environmental impact of your RM program. For a complete assessment of your program, please contact your TAB representative for the latest information on our offerings and sample consultation scenarios. You can also request to be contacted by a TAB representative by clicking [here](#).

A. Life Cycle Practices

By imposing life cycle controls on the physical resources that go into creating, storing and distributing record media, records management is very much an exercise in natural resource management. In conjunction with an effective recycling program, records management ensures that raw materials that would otherwise occupy valuable office space (including land and maintenance resources) are put to more productive use.

In other words, the better we manage our records, the better we protect the environment!

In assessing the impact of your organization's records life cycle practices, ask the following questions:

1. Does your organization have a policy authorizing or requiring employees to dispose of non-record material when it is no longer useful? Examples of non-records include duplicate copies, most draft documents, outdated reference materials and blank forms.

2. How often does your organization conduct clean-up days to identify and purge non-record material that is no longer useful?

- Quarterly Semi-Annually Annually At the end of major projects/initiatives Not at all

3. Has your organization developed a records retention schedule which authorizes disposal of different categories of records, subject to the expiry of standard time periods? If so, was it developed based on documented research of all legal and operational requirements for keeping records?

4. Has your organization implemented records retention schedules by regularly identifying and disposing of records whose retention periods have lapsed?

5. Do your work teams minimize duplicate copies and control document versions? Check which of the following best describes your teams' practices:

- We use centralized filing systems with all relevant documents populating a single file.
- We use document management software tools which track and control changes to a single master document that is accessible to all team members who need it.
- We have multiple copies, drafts and versions of the same document stored across individual offices and electronic repositories.

6. What steps has your organization taken to encourage personnel to create and retain records in electronic format and actively discourage them from creating paper copies?

7. Has your organization implemented an electronic document management system that allows you to replace multiple paper copies with one version-controlled electronic document?

8. Would your organization benefit from electronic imaging and transmission options as an alternative to physically transporting paper documents across different geographic locations?

B. Filing Equipment and Supplies

To further minimize the impact of records storage and use, organizations should give careful consideration to the composition and design of the file cabinets, shelving units, folders and other enclosures that support file management activities on a day to day basis.

In selecting records management equipment and supplies or assessing the impact of current products, ask the following questions as applicable:

1. Do your organization's cabinets, shelving and other filing equipment maximize the records storage potential of available floor space? Examples of effective equipment choices include lateral filing instead of pull-out vertical cabinets, as well as high-density mobile shelving that replaces multiple shelving access aisles with a single 'movable aisle.'

2. Does your organization use file folders, pockets, label designs and other filing supplies that help maximize the storage potential of filing equipment? Examples of effective filing supply choices include end tab file folders and color-coded labelling systems, which work together to avoid bulky hangers and maximize the number of visible filing rows available in a given shelf or cabinet.

3. Can your organization's file folders and/or pockets be expanded as needed to accommodate growth within a file? Expandability allows a 'thin' file to occupy minimal space, while at the same time accommodating additional content without needing to replace and throw away an outgrown folder/pocket.

4. How often do you have to replace your organization's filing supplies due to wear and tear? Every:

- 6 Months Year 2 Years 5 Years

5. List the filing supplies your organization uses that can be reused after contents have been transferred or disposed of. The records management marketplace is offering many new options for reusable filing enclosures, including paper file folders from which adhesive labels or writing can be removed without visible damage to the paper.

6. Can your organization's folders and other paper materials be recycled by service providers available in your area once they are no longer needed?

7. Where your organization's folders, pockets and other filing supplies contain non-paper materials (e.g. Mylar), are those materials biodegradable? In answering this question, organizations are encouraged to consult industry biodegradability standards such as the European Union's ED13432 or the US Standard Specifications for Compostable Plastics (ASTM D-6400-99).

C. Information Management Services

Few businesses operate in a vacuum where their environmental impact is determined solely by their own direct practices. The overall impact for any organization will be determined in large part by the practices and conditions of any organizations from which it receives services. In the records management world, such services may include offsite or near-

site storage of physical records, document disposal (e.g. shredding), and computing equipment leasing.

In selecting possible service vendors or revisiting the practices of a current vendor, ask the following questions as applicable:

1. Do offsite or 'near-site' storage providers use storage equipment which maximize the storage potential of warehouse floor space and associated land resources?

2. Do offsite or 'near-site' storage providers follow a delivery/return schedule that optimizes the productivity of each trip between your work site and the warehouse? In other words, does the trip schedule ensure the maximum number of files transferred for each mile travelled?

3. Can secure paper disposal providers confirm that paper is subject to recycling once shredded?

4. Do secure paper disposal providers' recycling operations result in maximum paper product relative to the volume of material recycled?

5. Do secure paper disposal providers' operations avoid chemical agents and practices that pose an undue risk to the environment?

6. Do computing equipment lessors and/or disposal service providers use environmentally friendly methods for decommissioning used hardware?

Moving Forward

None of the questions above are intended to impose obstacles to the development and operation of business. Strategic application of environmentally-friendly records management can bring long-term benefits that outweigh their upfront costs. In realizing this return on investment, your records management program can discover what other areas of your organization may already know: that good environmental stewardship is good for business. Support for more cost-effective, legally compliant business operation is already one of the primary objectives of an effective records management program. To add a decreased environmental footprint to those benefits can only serve to raise records management's profile as an organizational value add.

At TAB, our long-standing experience in helping companies make more environmentally-friendly decisions when choosing their filing supplies and equipment has taught us that every situation is unique. Whatever you are looking for, or if you want to find out how TAB can help your organization, please [*contact us*](#).



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