

Records Management 101

FMs who know the techniques of records management can not only save space but improve the productivity of their organizations. This first article in a series introduces the concepts and their benefits.

By Dave Rintoul

Many facilities managers are responsible for records management activities within their organizations. This may be by design or out of necessity. Paper records take up space, often more space than managers realize. Electronic records are distributed via a network, creating challenges for cabling and connectivity within modern facilities. Eventually, all facilities managers have to deal with records.

Without records management, records accumulate until they fill the space available. This is often overlooked until the time comes to move to new premises. Suddenly, the volume of records in place, the space they occupy and the cost to move them become crucial considerations.

"Something should have been done about this years ago!" senior management will insist. "We need a solution and we need it now!"

And so, although it is really too late and it was never mentioned in their job description, records management becomes a priority for the facilities manager.

Where do you begin? How do you create control out of chaos? How do you keep this from happening to you and your organization again and again?

This series of articles will help you answer these questions. This introduction will touch on some key elements of a records management program. Later articles will deal with specific topics in more depth.

Space management is the first priority of facilities managers. Often, filing equipment is selected based on esthetics instead of function. The result is that

both floor space and staff time are wasted. By replacing these obsolete tools with more efficient equipment and supplies, you can save up to 80 per cent of the space records occupy.

This is only the beginning. If records management has been neglected for some time, you will find unnecessary records throughout your offices. Why don't they just throw them out? The answer is simple. No one has been told to get rid of them. So, the records accumulate and the facilities manager is called upon to accommodate them.

Discard one third of files

If you think there must be a better way, you're right. The answer is a policy called a records retention schedule. Creating one takes research as to how long the law requires the records to be kept. It also takes an understanding of

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who uses the records and why. It's a lot of work but it pays off. Your organization can probably destroy about one third of its records with a properly developed retention schedule.

You'll also find that many records aren't used much. There may be a legal requirement to keep them but they aren't very active. As a rule of thumb, about one third of your records are probably like this. These records can be sent off-site to a records centre which can store and retrieve them for you. They can do this at a fraction of the cost of



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office space. A well thought-out retention schedule tells staff when to send records to storage and when to destroy them. This is vital if you are responsible for managing floor space costs.

Some will argue that saving floor space is really a technology problem. Computers will eliminate paper and the space it occupies, so why invest in records management? This sounds good in theory. In practice, the results so far have not been

very promising. More paper is used now than ever before. Seventy per cent of electronic document management projects have failed to deliver the intended results. Managing records electronically requires thorough up-front analysis and a foolproof methodology for implementation.

This is just a quick sampling of what is planned for this series. Each upcoming issue will provide new and more in-depth ideas about how facilities managers can meet the challenge records pose for their organizations.