

CASE STUDY

Partnering with Records Solutions means that you're committed to better-than-good information management. You're driven by how your organisation can meet community expectations while also delivering on business needs and balancing your compliance mandates.

Client Industry:	Not for Profit (Educational/Medical)
Project	Develop/Update Retention and Disposal Schedule

This client was a not-for-profit professional organisation for clinicians, responsible for administering training programs, accreditation for overseas-trained specialists, and a continuing professional development program for its members.

Records Solutions was engaged to update their Retention and Disposal Guide (R&DG) that was last updated in 2013. Although not legislatively required to follow established state or national disposition schedules, the management of records was determined as a risk and the updating of the schedule seen as a first step in the process.

As the engaged consultants for this project, Records Solutions:

- Reviewed the current R&DG
- Conducted research into the legal and business requirements regarding recordkeeping
- Interviewed key members of the team to ascertain business processes and recordkeeping undertaken
- Produced an updated retention and disposal schedule tailored to the clients requirements that incorporated best practice and compliance requirements

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Client Industry:	Not for Profit (Retirement & Aged Care, Foster Care, Family/Youth Support, Social Housing)
Project	Records Management Health Check

The client sought to establish an Information and Records Management (R&IM) Framework across the organisation. To commence this project, the client engaged Records Solutions to conduct a R&IM health check that would include a review of the records management needs and existing practices, offering recommended improvements and assessment in terms of:

- Operational compliance, efficiency, quality assurance and business effectiveness
- Identification of key records-centric business processes and opportunities for improvement in quality and/or efficiency
- Review records electronic storage and provide recommendations on best practice
- Information Management Maturity Assessment.

In summary, the following deliverables were provided through the delivery of this project:

- Comprehensive assessment report of the current records and information management position (health check)
- Records and Information Management Implementation Plan
- Maturity Assessment
- Physical Holdings Analysis.

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Client:	Diabetes Australia
Project	Review of National Diabetes Services Scheme Record Storage Arrangements and Future Planning

Diabetes Australia is the national body for people affected by all types of diabetes and those at risk. In collaboration with state and territory diabetes organisations they administer the National Diabetes Services Scheme (NDSS).

Diabetes Australia engaged Records Solutions to audit all NDSS records held by stakeholders nationally across all record classes; to quantify all records held; determine existing national storage requirements, record locations and storage costs across all state and territory locations; advise on record sentencing status; identify any records eligible for destruction; develop an approach and high-level costs for the digitisation of all NDSS records moving forward.

In summary, the following deliverables were provided through the delivery of this project:

- An overview of existing volumes of records stored physically and digitally by each jurisdiction
- An assessment of compliance by jurisdiction against all relevant legislation for current record storage requirements
- The current costs associated with current physical and digital record storage
- Any opportunities to reduce the volume of physically stored records held by all stakeholders including destruction costs
- A practical and workable approach to digitising new records observing all relevant legislation by jurisdiction
- Provide high level costs to digitise all remaining records held nationally and recommendation of providers
- Advice on the digitisation of all NDSS records moving forward



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After completion of the project, Records Solutions received the following feedback - Records Solutions was able to bring Diabetes Australia additional capacity and expertise to work through a complex storage and retention project. The team was flexible to work with and responsive to our needs - Anthony Polinelli (Deputy General Manager)