

Memo



Date: January 14, 2011
File: 0155-50
To: City Manager
From: City Clerk
Subject: Corporate Records and Information Management (RIM) Program Bylaw
Report Prepared by: Deputy City Clerk

Recommendation:

THAT Council receives the report of the City Clerk, dated January 14, 2011 regarding the Corporate Records and Information Management (RIM) Program;

AND THAT Council gives reading consideration to Bylaw No. 10400 being the Corporate Records and Information Management Program Bylaw.

Purpose:

To establish the City of Kelowna Corporate Records and Information Management (RIM) program bylaw as part of the recommended governance structure for the RIM program.

Background:

In 1995, a five year Records Management Strategy was developed for the City following the enactment of the *Freedom of Information and Protection of Privacy Act (FOI)*. It was recognized at this time, through the direction provided by a Steering Committee, that the implementation of a city-wide Records Management program was a top priority in both "addressing the new legislation, and to the overall operational efficiency of the City." The recommendations that came from the 1995 strategy, and subsequent implementation, have resulted in the establishment of the current records management and information program for the City of Kelowna.

RIM Strategy Review

The growth of operations, requests under the Freedom of Information Act, and use of technology, has created the need to update our records management strategy in support of the efficient management and retrieval of records in the most cost-effective manner.

To update the current RIM Strategy, a review of the program was conducted in 2010 by the Office of the City Clerk, with input from the RIM contacts, Information Services (IS), Directors and other internal stakeholders. The review included:

- Identification of current strengths, weaknesses, opportunities and threats;
- a corporate-wide on-line RIM program survey;
- creation of a governance structure including the vision, principles, goals and objectives; and
- recommendations for updating the RIM program including prioritizing activities and an implementation plan that considers budgetary and resource requirements.

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RIM Strategy Recommendations 2011-2015

1. Management of Physical Files and Electronic Records

Establish RIM program tools and guidelines based on the legislated framework found in the RIM Bylaw

- Document records procedures through the creation of administrative policies
- develop a comprehensive RIM program manual and system user manual
- measure and monitor the success of the program including regular audits
- work with Information Services on the migration of electronic records

2. Training, Support and Education

Continue building a commitment to records and information management through awareness and understanding of the RIM program

- implement annual general RIM training sessions and records classification workshops for all city staff
- continue supporting all City departments with one-on-one assistance as requested
- continue Records Management Team meetings and consider extending membership for all interested employees
- provide one-on-one new employee orientation to records and information management

3. Transition to Electronic Document Management

Develop and implement an electronic document management system utilizing the SharePoint platform

- continue collaboration with IS on the implementation of EDMS through SharePoint
- work with IS to coordinate the corporate-wide review of network drives
- identify and transfer electronic documents currently stored to network drives and hard drives to Sharepoint EDMS

Summary

The review undertaken by the Office of the City Clerk has provided a framework of goals and objectives for continued growth of the records and information program over the next five years. As a complement to the Freedom of Information and Protection of Privacy Bylaw No.9682, the proposed Corporate Records and Information Management Program Bylaw will provide the foundation for continued growth and excellence of the records and information program at the City of Kelowna.

Internal Circulation:

Information Services
Purchasing

Legal/Statutory Authority:

Community Charter s.148

Financial/Budgetary Considerations:

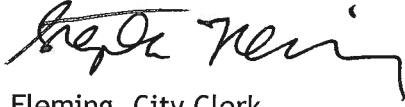
Corporate RIM Program development, training, support and education, including transition to EDMS and implementation of SharePoint is included in operating budgets. The review and transfer of electronic records currently stored on the networks to SharePoint will require additional funding.

Personnel Implications:

The Corporate RIM Program requires the ongoing management of physical and electronic records according to RIM program policies and guidelines.

Considerations not applicable to this report:
Legal/Statutory Procedural Requirements:
Existing Policy:
External Agency/Public Comments:
Community & Media Relations Comments:
Alternate Recommendation:

Submitted by:



S. Fleming, City Clerk

Approved for inclusion:



R. Mayne, Director Corporate Services