



Adequate Records Management in Perspective - Records Management Training

Why have a records management training plan?

A records management-training plan provides a key tool to enable agencies and authorities to satisfy the requirements of the *State Records Act 1997*. It will also identify and give a clear structure to the actions required to improve records management practices across agencies. A training plan will also enable agencies to meet the requirements of Outcome 8 of the *Adequate Records Management - Meeting the Standard*.

Who needs records management education & training?

All staff need to be provided with records management education. This will ensure they are aware of their records management obligations and the implications this has on their day-to-day work.

It is important that all records management staff receive training appropriate to the degree and level of their involvement in records management activities. Accredited training modules are currently being developed by State Records to ensure records management staff have the necessary skills to develop and implement a strategic records management program in their agency.

Who is responsible for the development of records management training plans for agencies?

Records managers are responsible for ensuring that a training plan is in place and that its success is measured in their respective agency.

What are the elements of a Records Management Training Plan?

- Clear training objectives
- Differentiated training according to staff responsibilities
- Tools for providing training
- Provision for ongoing training
- Measurable outcomes in terms of training
- Review and reporting mechanisms.

What issues need to be addressed in a Records Management Training Plan?

The *Adequate Records Management - Meeting the Standard* requires that all staff have an appropriate awareness of their agency's policies, procedures and practices in the following records management areas:

- creation
- capture
- disposal
- access to records and disclosure of information within the records
- alteration
- record version control
- security
- validation of records.

Training should also include awareness of relevant legislation, such as the *State Records Act 1997* and the *Local Government Act 1999*. For a brief overview of prominent legislation see State Records' *Recordkeeping Requirements within South Australian Legislation* (2002).

What delivery methods are appropriate for records management training?

Delivery methods may include the following:

- incorporation in employee induction programs
- training in the use of records management services and tools, including searching and retrieval tools
- advertising records management services in employee newsletters
- briefing sessions and seminars
- issuing leaflets, booklets or guides describing aspects of your organisation
- short computer based presentations on an intranet
- use of State Records' Records Management Training program for agencies.

What are the required outcomes from a records management training plan?

That all staff be:

- aware of who the records managers are in their agency
- aware of the basic principles of records management
- aware of the *State Records Act 1997*.

That Senior Management be:

- aware of records management principles and any related policies and programs for their agency

- able to identify those who are responsible for implementing the agency's records management program¹.

What support is available?

State Records provides a comprehensive education and training service to South Australian Government, including:

- State Records has developed a CD-ROM that introduces records management and its importance in the workplace. This is an invaluable tool as part of an induction program or to provide current staff with a basic overview of records management issues
- State Records currently offers a number of education and training modules covering records management issues. Contact the Course Registrar <http://www.archives.sa.gov.au/contact.html> for further details.
- These modules are targeted at the records management novice and practitioner as well as various audiences (e.g. Business Managers, Executive etc.).
- SALGIN (State and Local Government Information Network), organised by State Records, hosts forums that feature key speakers on a variety of records management related topics.

Further information

- Business Services Training Australia, *National Competency Standards for the Records and Archives Industry*. These standards cover all aspects of work performance. Available at: <http://www.bsitab.org/>
- Standards Australia, Australian Standard AS ISO 15489-2002, *Records Management* (2002).
- State Records Authority of New South Wales, *Records Management Guideline 9, Principles in Practice: Guidelines on Establishing and Maintaining a Records Management Program* (1999), pp. 28-32.
- State Records Authority of New South Wales, *Building Better Records Management Skills: Guidelines* (2003).
- Archives of Ontario, *Retention and Disposal of Recorded Information—Program Management* <http://www.archives.gov.on.ca/>

Visit our website <http://www.archives.sa.gov.au>

¹ Adapted from Archives of Ontario, *Retention and Disposal of Recorded Information –Program Management*.