

In this issue:

ERM, ILM, ECM or BIG, South Africa's hungry for it (By Michael Steemson) *pg 10-14*

"Call it Information Lifecycle Management, Enterprise Content Management, Business Information Governance or Records Management (electronic or otherwise), South African recordkeepers are lapping it up..."

ALSO Inside:

- **Events,** **pg 2-7**
- **Rockefeller fellowship** **pg 8-9**

ESARBICA NEWSLETTER

2007 Issue No: 18

January

For more information, contact the editors Mr. S. Katuu skatuu@yahoo.com or Prof. P Ngulube ngulubep@nu.ac.za

Events

Jan 2007

January 29th – 9th March **Records and information management** Course convened by the Institute of Development Management in Lesotho. **Deadline 29th December 2006**. Contact: Matthias Chida Email: mchida@idmbls.com Website: <http://www.idmbls.com/crs/crsrec.html>

Feb 2007

Feb-March **ICCROM Course on Conservation of Built Heritage** Application deadline **31st July 2006** to ensure inclusion in our selection process. Contact ICCROM - Sites Unit 13, via di San Michele I-00153 ROME RM, ITALY Tel (+39) 06585531 Fax (+39) 0658553349 E-mail: builtheritage07@iccrom.org Website: www.iccrom.org

February 5th **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: [virginia@documentwarehouse](mailto:virginia@documentwarehouse.co.za) Website: <http://www.documentwarehouse.co.za/>

February 6-8th **Libraries and information management in Africa** conference and workshop convened by Melrose Advanced Professional Training in Johannesburg, South Africa. Contact Besa Simbeye Tel: (27)114841112 Fax (27)114841166 Email: besa@melrosetraining.co.za Website: www.melroseadvanced.co.za

February 12th **Records and information management level 2** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: virginia@documentwarehouse Website: <http://www.documentwarehouse.co.za/>

February 13th – 15th **Knowledge and information auditing and mapping short course** convened by Knowledge Leadership Associates in Midrand, South Africa. Contact Ben Fouche Tel: (27) 218545480 or Cell (27) 832916671 Email: bf@knowlead.co.za Website: <http://www.knowlead.co.za/course/audit/>

February 20th – 22nd **Electronic documents and records management system** Workshop convened by IQPC in Melrose Estate, Johannesburg, South Africa. Contact (27)116695000 Email: info@iqpc.co.za Website: <http://www.iqpc.com/cgi-bin/templates/singlecell.html?topic=536&event=11885>

February 20th -22nd **Knowledge and information auditing and mapping short course** convened by Knowledge Leadership Associates in Cape Town, South Africa.

Contact Ben Fouche Tel: (27) 218545480 or Cell (27) 832916671 Email: bf@knowlead.co.za Website: <http://www.knowlead.co.za/course/audit/>

February 20th – 23rd **Basic archives and records management**. Training course to be convened by the Centre of Applied Communication at UNISA. Deadline for registration **9th February 2007**. Contact Ms T Manganyi Tel: (+27) 114713896 Fax: (+27) 114713906 Email: mkokong@unisa.ac.za Website: <http://www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=17563>

March 2007

Advanced international records management training program (phase 2) Conducted by the Swedish National Archives. Deadline for application was 1st March 2006 Contact: Riksarkivet C/o Hanna Eriksson Box 12541 SE-102 29 Stockholm, Sweden Fax +4687376474 Phone (+46)87376350 Website: http://www.ra.se/ra/recordsmanagement/index_eng.asp

March 5th **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: virginia@documentwarehouse Website: <http://www.documentwarehouse.co.za/>

March 12th **Records and information management level 2** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: virginia@documentwarehouse Website: <http://www.documentwarehouse.co.za/>

March 13th – 14th **Registry management workshop**. Training course to be convened by the Centre of Applied Communication at UNISA. Deadline for registration **2nd March 2007**. Contact Ms T Manganyi Tel: (+27) 114713896 Fax: (+27) 114713906 Email: mkokong@unisa.ac.za Website: <http://www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=17563>

March 26th **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: virginia@documentwarehouse Website: <http://www.documentwarehouse.co.za/>

April 2007

April 11th – 12th **Records management – Managers' workshop**. Training course to be convened by the Centre of Applied Communication at UNISA. Deadline for registration **2nd April 2007**. Contact Ms T Manganyi Tel: (+27) 114713896 Fax: (+27)

114713906 Email: mkokong@unisa.ac.za Website:

<http://www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=17563>

May 2007

May 7th **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

May 14th **Records and information management level 2** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

May 14th – 18th **Intermediate archives and records management**. Training course to be convened by the Centre of Applied Communication at UNISA. Deadline for registration **4th May 2007**. Contact Ms T Manganyi Tel: (+27) 114713896 Fax: (+27) 114713906 Email: mkokong@unisa.ac.za Website:

<http://www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=17563>

May 29th – 31st **South African Museum Association** National Conference and Annual General Meeting to be held at Cradle of Humankind, in Krugersdorp, South Africa. Contact Website: <http://www.samaweb.org.za/conf.htm>

June 2007

June 4th **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

June 5th **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

June 5th – 6th **Registry management workshop**. Training course to be convened by the Centre of Applied Communication at UNISA. Deadline for registration **25th May 2007**. Contact Ms T Manganyi Tel: (+27) 114713896 Fax: (+27) 114713906 Email: mkokong@unisa.ac.za Website:

<http://www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=17563>

June 11th **Records and information management level 2** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel:

(+27)112980700 Email: virginia@documentwarehouse Website:
<http://www.documentwarehouse.co.za/>

June 18th **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel:

(+27)112980700 Email: virginia@documentwarehouse Website:
<http://www.documentwarehouse.co.za/>

June 25th **Records and information management level 2** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel:

(+27)112980700 Email: virginia@documentwarehouse Website:
<http://www.documentwarehouse.co.za/>

July 2007

XIV Bi-Annual ESARBICA Conference to be convened in Tanzania, hosted by the National Archives of Tanzania. For more information

<http://www.geocities.com/esarbica/conf.html>

July 16th **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel:

(+27)112980700 Email: virginia@documentwarehouse Website:
<http://www.documentwarehouse.co.za/>

July 23rd **Records and information management level 2** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel:

(+27)112980700 Email: virginia@documentwarehouse Website:
<http://www.documentwarehouse.co.za/>

July 30th **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel:

(+27)112980700 Email: virginia@documentwarehouse Website:
<http://www.documentwarehouse.co.za/>

August 2007

August 7th – 8th **Registry management workshop**. Training course to be convened by the Centre of Applied Communication at UNISA. Deadline for registration **26th July 2007**. Contact Ms T Manganyi Tel: (+27) 114713896 Fax: (+27) 114713906 Email mkokong@unisa.ac.za Website:
<http://www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=17563>

August 13th **Records and information management level 2** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel:

(+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

August 20th **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel:

(+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

August 27th **Records and information management level 2** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel:

(+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

August 28th – 31st **Basic archives and records management**. Training course to be convened by the Centre of Applied Communication at UNISA. Deadline for registration **17th August 2007**. Contact Ms T Manganyi Tel: (+27) 114713896 Fax:

(+27) 114713906 Email mkokong@unisa.ac.za Website:

<http://www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=17563>

September 2007

September 10th **Records and information management level 1** Workshop

convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel:

(+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

September 10th-13th **Influence with Integrity** recordkeeping conference convened by the Records Management Association of Australasia in Wellington, New Zealand.

Contact RMAA Marketing and Event Manager, Ms Kristen Keley email:

marketing@rmaa.com.au website <http://www.rmaa.com.au>

October 2007

Advanced international records management training program (phase 3)

Conducted by the Swedish National Archives. Deadline for application was 1st March

2006 Contact: Riksarkivet C/o Hanna Eriksson Box 12541 SE-102 29 Stockholm,

Sweden Fax +4687376474 Phone +4687376350 Website:

http://www.ra.se/ra/recordsmanagement/index_eng.asp

October 1st **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel:

(+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

October 2nd – 3rd **Registry management workshop**. Training course to be convened by the Centre of Applied Communication at UNISA. Deadline for registration **21st September 2007**. Contact Ms T Manganyi Tel: (+27) 114713896 Fax: (+27) 114713906 Email mkokong@unisa.ac.za Website:

<http://www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=17563>

October 8th **Records and information management level 2** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

October 15th **Records and information management level 1** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

October 22nd **Records and information management level 2** Workshop convened by Document Warehouse in Johannesburg. Contact Virginia Hendricks Tel: (+27)112980700 Email: virginia@documentwarehouse Website:

<http://www.documentwarehouse.co.za/>

November 2007

November 19th – 23rd **Intermediate archives and records management**. Training course to be convened by the Centre of Applied Communication at UNISA. Deadline for registration **9th November 2007**. Contact Ms T Manganyi Tel: (+27) 114713896 Fax: (+27) 114713906 Email: mkokong@unisa.ac.za Website:

<http://www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=17563>

November 29th – 30th **Records management – Managers' workshop**. Training course to be convened by the Centre of Applied Communication at UNISA. Deadline for registration **19th November 2007**. Contact Ms T Manganyi Tel: (+27) 114713896 Fax: (+27) 114713906 Email mkokong@unisa.ac.za Website:

<http://www.unisa.ac.za/Default.asp?Cmd=ViewContent&ContentID=17563>

July 2008

XVith International Congress on Archives to be convened in Kuala Lumpur, hosted by the International Council on Archives Website:

<http://www.ica.org/calendrier.php?pcalendrierid=237&plangue=eng>

Fellowship for a Visiting Archivist from the Developing World at the Rockefeller Archive Center

The Rockefeller Archive Center invites applications for a Visiting Archivist Fellowship for a professional archivist from the developing world.* The Rockefeller Archive Center will host a visiting archivist for up to one month for the purposes of enhancing professional development, and extending knowledge of the Center's collections. Applications must be postmarked by January 31st each year, and awards will be announced at the end of April.

Terms of Selection, Conditions of the Award, and Responsibilities

Candidates

Applicants must be, or recently have been, employed as archivists, and demonstrably able (1) to improve their archival skills through a fellowship at the Center, and (2) to contribute to a better understanding of the Center's documentation of the applicant's nation or region. The successful applicant will have a B.A. or equivalent, professional archival training, and 2-5 years experience as an archivist. He/she should be seeking to expand his/her experience in order to develop new services or technologies in his/her home institution. The candidate must have a strong command of spoken and written English, and must provide evidence to that effect. Application materials will be mailed to prospective applicants on request.

Responsibilities

At the Archive Center, the visiting archivist will first observe the Center's operations, and participate in the Center's activities. The visiting archivist will then undertake an archival project planned in consultation with the Center's executive director and staff prior to his/her arrival. Examples of appropriate projects include:

- Processing a series of documents related to the visiting archivist's interests
- Studying the preparation of documents for microfilming, and microfilming standards
- Learning about procedures and standards for assisting scholarly researchers
- Surveying the archival resources at the Center relevant to the visiting archivist's nation or region, including photographs and films
- Studying the Center's use of computers and computer databases to manage its collections

In accord with the visiting archivist's professional goals, Center staff also will arrange for the visiting archivist to tour other archival facilities. Since the Center is open only on weekdays,

the visiting archivist may use weekend days for professional and personal travel.

The visiting archivist will prepare a brief written result of his/her project at the Archive Center, possibly for publication on the Center's web site or in its Newsletter.

Stipend and Expenses - The visiting archivist will receive a \$5000 stipend for a four-week fellowship, reduced proportionately if the fellowship is for a shorter period. The fellowship must be for at least two weeks.

The visiting archivist's stipend is intended to cover the costs of housing, food and local transportation. The visiting archivist also will be reimbursed for reasonable round-trip travel expenses from his/her place of residence. The visiting archivist is responsible for keeping round-trip travel costs to a minimum by purchasing the lowest-cost airfare. Round-trip travel costs must be kept under \$3500.

*South and Central America, including Mexico; the Caribbean; Africa; south and central Asia; China; Korea; Taiwan; the Philippines; Indonesia; and the Pacific Ocean states.

Additional information and for application forms see

<http://archive.rockefeller.edu/grants/visitingarchivist.php>

For additional information on other Rockefeller grants see

<http://archive.rockefeller.edu/grants/>

ERM, ILM, ECM or BIG, South Africa's hungry for it

By Michael Steemson

Call it Information Lifecycle Management, Enterprise Content Management, Business Information Governance or Records Management (electronic or otherwise), South African recordkeepers are lapping it up with their braaivleis boerewors, braaipap, biltongⁱ and Castle beer.

Thirty of so of them, black and white in almost equal parts, came from across Nelson Mandela's "rainbow republic" in July 2006 to one of Johannesburg's swankiest suburbs, Sandton, at up to 10,000 Rands a head, to hear foreign and home-based consultants and practitioners during three days of presentations and workshops.

They were from Jo'burg, of course, Pretoria, Durban, Namibia and Cape Town and they soaked up the information from U.K., U.S., N.Z. and local consultants and practitioners from South Africa's National Archives and Records Service, its Human Rights Commission and largest bank. Most of the South African consultants, like NokusaEI Director Rob Cells, leader of the Day Three-long ECM workshop, have Australian links with company colleagues and have worked there frequently.

All the delegates knew about Australia and New Zealand, of course, because of the Southern Hemisphere's Tri-Nations Rugby and other sporting links. Some would like to emigrate there, others, like University of South Africa Records Centre Manager, Ngwanaphalama More and plan to speak at the RMAA's 2007 National Convention Wellington, N.Z.

The conference was launched by Sello Hatang, Manager, PAIA (Promotion of Access to Information Act), for the South African Human Rights Commission and former head of the crusading South African History Archive (SAHA) that campaigns for retention of records of the nation's dark, apartheid past.

Nailing jelly to the wall

He spoke of challenges familiar to records managers worldwide: changing the culture of ownership of the records and changing consciousness that the records constitute a critical part of the heritage of the country. It was, he joked, like nailing jelly to the wall.

South Africa's Standard Bank Archives and Historical Services Manager, Barbara Conradie warned: "The dream of a paperless society is fast becoming a nightmare." Her paper, *To Destroy or Not to Destroy*, lead delegates through the labyrinths of risk managements, compliance, accountability and the rest. In a country only recently concerned with privacy law, freedom of information, public record legislation and the like, the themes were new and ominous. But her advice was universal: "Do we destroy or not. That is the question we ask ourselves at every intersection along the road that records travel. The only way the answer the question is to go through the (disposal) process step by step."

Recordkeeping training was another hot topic for the South Africans. Lorna Ndlela, Configuration and Documentation Manager for Eskom Transmission Technology, hit out at the academic sector. "The important question is why is this not fully addressed by the academics? If records and documents are carriers of information, then it is time academics gave the management of records and documents the attention it deserves; examined their curricula to address in depth the various skills required," she said, adding: "Information management service providers or consultants also need to develop accredited records management courses that will be o value to organizations."

She gave them another challenge, familiar in Australasia, but alarming in the new freedoms, that until the education institutions got their act together, information workers must look to their own needs. She told the delegates of a new, to them, responsibility: "You need to make sure that records management training is implemented in your organization. You cannot achieve successful implementation of records management without it."

Local boy made good

South African local-boy-made-good, consultant Gary Zelman, brought heartening storage news from his U.S. company Network Appliance Inc, where he is now a senior consultant in “information lifecycle management”. He looks after development of the company’s professional services for integrated storage solutions for structured, semi-structured and unstructured information.

He’d been headhunted to the US by the EMC Corporation as its director of technology and planning for networked storage solutions. He took his admiring countrymen and women through a series of guides and questionnaires on legal and commercial compliance and security risks, asking them for answers to leading questions like “If you could change any two things regarding how information is managed in your organisation, what would they be?” He got as many different answers as there were delegates ... and then some.

Day Three of the Sandton Towers Hotel Convention Centre event was taken up with a hugely comprehensive workshop on what Fontainebleau engineering informatics (that’s what the EI stands for) company NokusaEI director Rob Cells, calls Enterprise Content Management. Rob illustrated the horrors of bad management ... “lots of white space in the organisation” ... with results like insurance applications that take 28 days to process but actually require only 26 minutes’ work; unimportant stationery that costs less than \$10 an item incurring expenses of \$300 in reviews, sign-offs and approvals; order taking 180 days to fulfil against a competitor’s 30; 40% erroneous invoices resulting in huge reconciliation costs and customer turn-off.

He told the attentive delegates their work was part of a process. He said: “Processes are concerned with results ... the output of goods and services. A process perspective is the customer’s perspective. Customers are only interested in value.” What records managers could establish was that their work in the information flow process added value, value for which the customers were prepared to pay.

Neat a definition as you’ll meet

South African National Archives and Records Service Assistant Director Louisa Venter joined Rob Bells in the workshop, saying she didn't much mind what the job was called but her institution defined it as "a process of ensuring creation, maintenance, use and disposal of records throughout their lifecycle to achieve efficient, transparent and accountable governance" ... as neat a description of recordkeeping as you'll meet in a kudu kilometre.

Then she listed some of the new, post-apartheid laws that the latter-day South African record keeper has to deal with ... the Municipal Finance Management Act 2002, the Promotion of Access to Information Act 2002, the Promotion of Administrative Justice Act 2002, the Electronic Communications and Transactions Act 2002, the Financial Intelligence Centre Act 2001, the Financial Advisory Information Services Act 2002, and more.

How much information, communication, transaction, intelligence and administration are they all about? Everything! And it all has to be managed, said the Assistant Director, Electronic Records Management Programme, to "enable the organisation to perform its functions successfully, efficiently and in an accountable manner".

The United Nations recently picked South Africa as one of eight "greatest advances in e-services in developing countries"ⁱⁱ. The country's gross national product is greater than the rest of sub-Saharan Africa. Small wonder then, that information management is becoming the hot potato on the veldt amongst the voortrekkersⁱⁱⁱ of the British Commonwealth's latest prodigal son.

Contact

Michael Steemson

Caldeson Consultancy

Tel: +64 (0)4 380 9323

Email: steemson@caldeson.com

Website: <http://www.caldeson.com/>

About the Author

Michael Steemson, ARMA, heads the New Zealand-based Caldeson Consultancy in business information management after 35 years in London journalism. He is Vice-President of the NZ Branch of RMAA. In the 1990's, he was for two years chairman of the Records Management Society of Great Britain and was a member of the Australia delegation on ISO's authoring sub-committee that created ISO15489. He has spoken at information conferences in Australia, Austria, China, England, the Netherlands, New Zealand, Scotland, Singapore, South Africa, Sweden, and Turkey.

ⁱ Barbecue, sausages, cornmeal and dried meat.

ⁱⁱ *UN Global E-Government Readiness Report 2005: From E-government to E- Inclusion*, United Nations, New York, U.S.A., 2005.

<http://unpan1.un.org/intradoc/groups/public/documents/un/unpan021888.pdf>.

ⁱⁱⁱ Voortrekkers = pioneers.