

Strategic Plan

2015 - 2020



1. Introduction

1.1 Purpose

The purpose of this strategic plan is to guide Records and Information Management Professionals Australasia course for the five-year period to 30 June 2020. The plan outlines the strategic focus and value that Records and Information Management Professionals Australasia seeks to deliver to stakeholders through implementation of strategies and initiatives, and by measuring progress against the strategic performance objectives (SPOs). This document is used as a key input into all of Records and Information Management Professionals Australasia planning processes and work programs.

Today RIM Professionals Australasia represents around 4,000 records and information management practitioners.

RIM Professionals Australasia has in that time also raised community awareness of the profession and records and information management issues. We have become advocates for practitioners and quality records and information management outcomes.

RIM Professionals Australasia has an ambitious 5-year Strategic Plan which will guide action at all levels from 2015 onwards. It outlines key strategic priorities in each of the following 4 program areas:

- Advocacy
- Knowledge
- Community
- Governance

RIM Professionals Australasia will focus on policy and advocacy in the coming 5 years. These have been identified as the two top reasons for being members of RIM Professionals Australasia, followed by member services, including education and professional development.

In the next 5 years, RIM Professionals Australasia will strengthen its position as a preferred commentator and source of policy advice on records and information management. We will continue to strengthen our media voice and influence governments by launching a wide range of policy statements and generating public and professional debate.

RIM Professionals Australasia will also progressively lift member services, improve and extend professional development and education opportunities, and we will continue to advocate recognition for the profession.

1.2 Objective

The objective of this strategic plan is to:

- provide focus and strategic direction;
- drive improvement at a strategic level;
- ensure immediate and longer-term goals are met; and
- Guide the allocation of resources.

1.3 Corporate planning process

Records and Information Management Professionals Australasia's integrated corporate planning process is shown in figure 1.1. The annual corporate planning process incorporates cyclical reviews of:

- operating environment;
- corporate and operational risks;
- financial plans, including provision of forecasts at times requested by stakeholders; and
- performance management and measurement plans.

Records and Information Management Professionals Australasia will continue to refine its corporate planning and reporting process to ensure these obligations are linked to Records and Information Management Professionals Australasia's corporate planning cycle and reflected in updates to this strategic plan.

1.3.1 Strengthening linkages

Records and Information Management Professionals Australasia's strategic planning process aims to strengthen the linkage between all of the above key processes and documents, and the required management, board and external reporting. The plan is based on an integrated planning framework with linkages between the:

- market and key stakeholders;
- vision, mission, statements of corporate intent (SCI's), and values;
- operational issues and business risks;
- strategies, initiatives, strategic performance objectives, measures, targets and accountabilities; and
- business structure, plans, projects, systems, processes and people.

The integrated planning framework shown in figure 1.2 is designed to strengthen the linkage between individual performance and contribution and the overall achievement of corporate objectives.

Figure 1.1: Integrated planning process

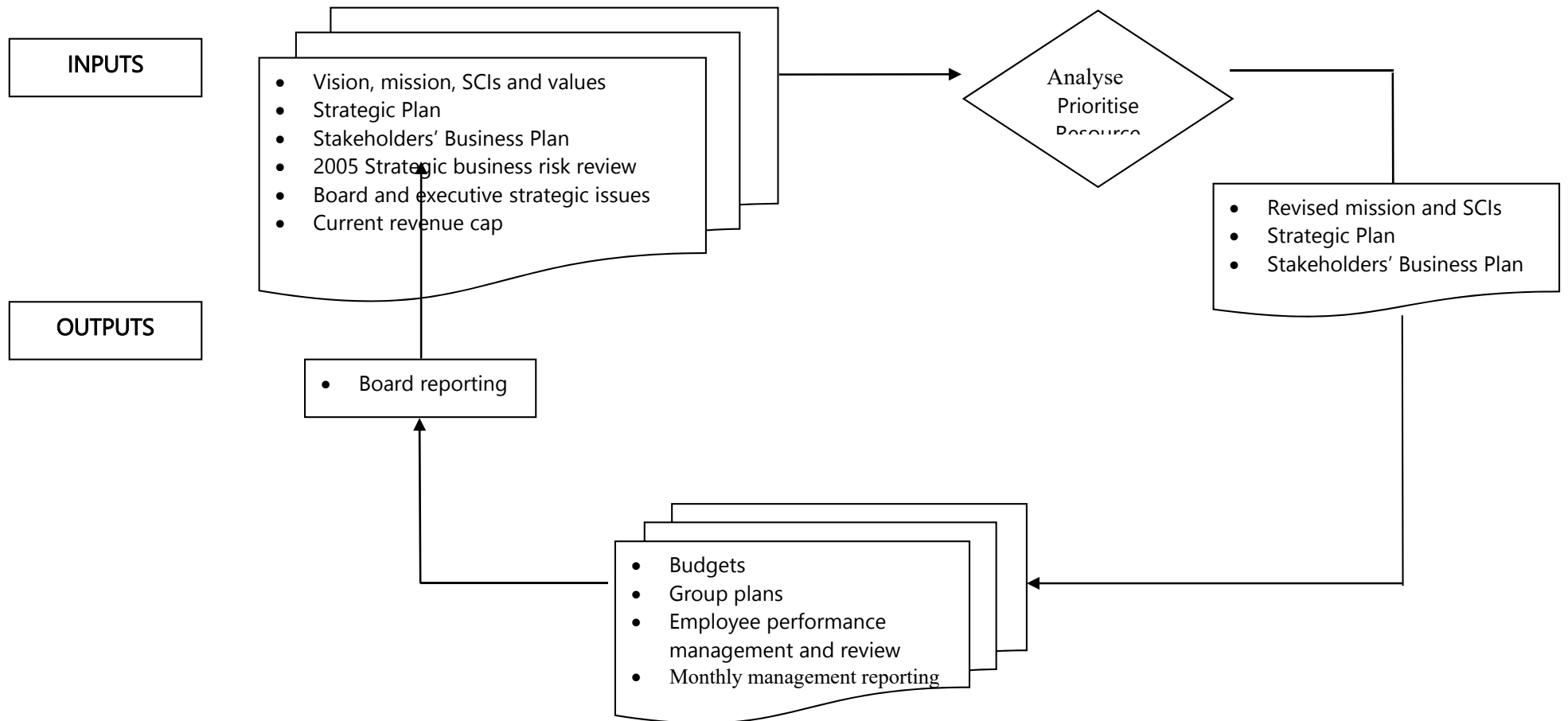
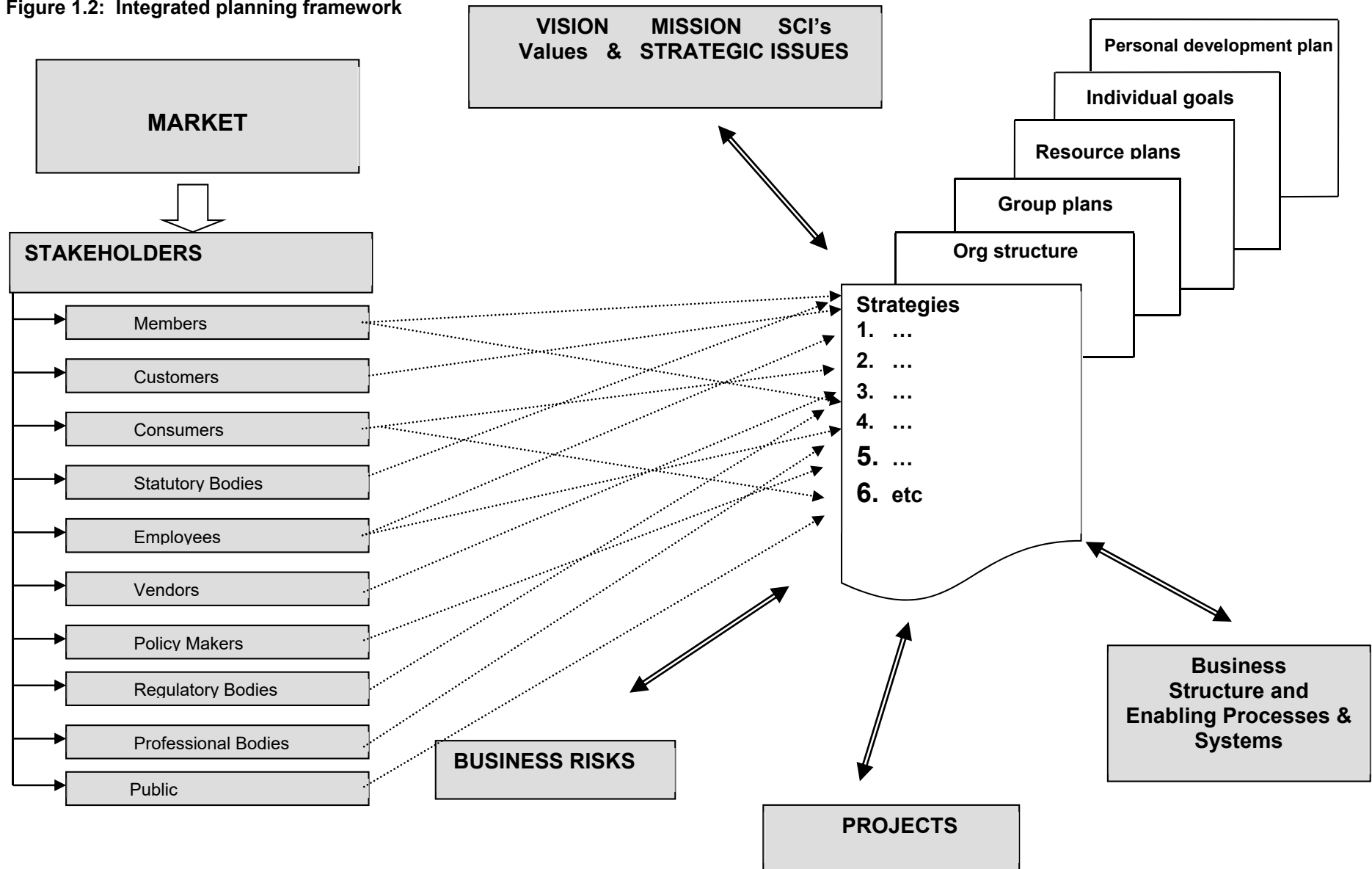


Figure 1.2: Integrated planning framework



1.4 Main undertakings

Records and Information Management Professionals Australasia (RIMPA) is the Company representing records management and information management professionals and other stakeholders. Records and Information Management Professionals Australasia leads the direction and fosters the growth of the records management profession through actively setting standards and building the capability of the profession.

Through its international affiliations and its close association with industry and academia, Records and Information Management Professionals Australasia ensures that its members are given access to a soundly-based professional recognition framework.

Records and Information Management Professionals Australasia vision recognises the changing requirements of business against a background of considerable economic challenge. It also acknowledges the continuing opportunity for the records management profession to actively contribute specialist knowledge for the delivery of records and information management solutions to business.

The annual Records and Information Management Professionals Australasia International convention (inForum) presents practitioners with solutions and the practical know-how to contribute to real business results.

2. Vision and mission

2.1 Vision

Records and Information Management Professionals Australasia vision clearly states where the company wants to be in the future. Records and Information Management Professionals Australasia vision is:

To provide guidance, direction and expertise to enable RIM excellence.

This vision drives Records and Information Management Professionals Australasia continuing focus on its core business while developing new business opportunities for the future.

2.2 Mission

Records and Information Management Professionals Australasia operating environment continues to experience a great deal of change. The Board and the management team anticipate and respond to these changes by reviewing and updating the company's mission, SCIs, and values as required.

Records and Information Management Professionals Australasia mission outlines what the company must do to achieve its vision. Records and Information Management Professionals Australasia mission is to:

To advance, develop and enhance excellence in records and information management profession and to promote its values.

2.3 Statement of corporate intent

Records and Information Management Professionals Australasia's statement of corporate intent is:

- To assist the profession in producing knowledge and skills, based on Records and Information Management Professionals Australasia's Statement of Professional Knowledge, that the community recognises as having real value in supporting an effective and equitable society;
- To be a Company that continues to grow its membership and encourages members to be actively involved.

Areas that assisted in the development of Records and Information Management Professionals Australasia Statement of Corporate Intent are:

- inclusive - recognising the wide range of people involved in records and information management'
- integrative - in terms of the knowledge, objectives and actions involved
- sustained - looking at the short, medium and long term issues
- spatial - dealing with the unique needs and characteristics of places
- value-driven - recognising that records and information management involves identifying, understanding and mediating conflicting sets of values
- action-oriented - seeing records and information management as the twin activities of mediation of space and making of place.
- This challenges us to think outside the box of statutory systems and to take a broader view of what society needs through records and information management and the practices by which to deliver this. It also challenges us to see records and information management as a societal activity - where professional records and information managers facilitate the activity, but do not own it.

Implications for the profession

For too long we have had too narrow a view of who should make up Records and Information management profession.

We need to recognise that records and information management is not a single discipline with one common knowledge set as its foundation. Periodic attempts to make this true by re-packing records and information management in a new box have failed. Records and information management is in reality characterised by a diversity of knowledge sets brought together by the common focus on spatial action.

We do not want to diminish the value of the professional qualifications that we offer, or its significance in terms of the knowledge and competence that Records and Information Management Professionals Australasia professional status (ARIM, MRIM, FRIM) brings to facilitating the activities of records and information management. We do believe that this professional status could and should mean even more than it does at present, and that association with Records and Information Management Professionals Australasia needs to take a wider variety of forms.

This has important implications for how we educate and how we organise.

Records and information management beyond the profession

We need to recognise also that the activity of records and information management is not owned by or restricted to Records and Information management profession, even with a broader definition of who that profession might involve.

The object of Records and Information Management Professionals Australasia is to be the recognised peak professional body for records and information management.

Fulfilling that duty effectively challenges us to seek wider participation in the work of Records and Information Management Professionals Australasia from those who share our aims and ideals and wish to make a contribution.

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We need to be aware of the external forces at work on us. Records and Information Management Professionals Australasia feels that matters of professional interest are ancillary to the overriding purpose, and that we should ensure that the activities of the Company should be accessible to those with an interest in records and information management, and not only those with a professional interest.

So we need to think about engaging with people whose interest in records and information management is not professional, and that leads us to think about the possibility of new forms of membership.

This also has important implications for how we organise.

What sort of organisation do we want to be?

We need to be a more inclusive and effective organisation to promote a more inclusive and effective agenda for records and information management.

We believe that the structure of our organisation needs to meet requirements in terms of:

- membership - providing the right degree of access and the right level of support for the diversity of professional and non-professional people engaged in promoting records and information management
- ownership - getting the balance right between involvement in the work of Records and Information Management Professionals Australasia and responsibility for its management
- outputs - making Records and Information Management Professionals Australasia much more effective in generating, promoting and spreading knowledge
- association - linking with other organisations not necessarily in the built environment area that can help us to advance our cause
- regulation - making sure that we meet our obligations to monitor the conduct of our professional members
- governance - making sure that we meet our legal obligations for effective stewardship of Records and Information Management Professionals Australasia
- accountability - having the systems that ensure probity and efficiency
- resources - developing an equitable approach to sources of subscription and other income, and its use across Records and Information Management Professionals Australasia, and using our staff more effectively
- leadership - finding and empowering the members of Records and Information Management Professionals Australasia who can provide the leadership that our mission requires.

We need to have a global and international perspective on this, recognising that we need the contribution of people outside Australasia.

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In developing our thinking we shall be applying following sets of tests:

- greater efficiency
- projecting a stronger sense of purpose
- promoting leadership
- making better use of resources
- managing risk effectively
- fitness for purpose
- greater representation
- engaging a wider cross-section of what should be a more diverse membership - diversities of gender, ethnicity, age, function, geography
- greater accountability
- clearer designation of roles and delegation of authority
- better audit and scrutiny systems
- realistic roles.

2.4 Values

- Acts ethically and serves the profession and the community with diligence and integrity
- Values its relationships and deals with members, volunteers, industry partners and others with trust, respect and openness
- Sets and maintains high standards of professional competency
- Fosters cooperation and innovative solutions
- Is achievement and outcome oriented, delivering member value, convenience and high levels of service

3. Key stakeholders

Identifying key stakeholders is integral to the successful implementation of winning strategies. Stakeholders are those individuals and organisations upon whom Records and Information Management Professionals Australasia depends for success. Understanding stakeholders' needs and expectations will enable Records and Information Management Professionals Australasia to develop strategies that provide a competitive advantage.

Records and Information Management Professionals Australasia's key external stakeholders include:

- Members
- Customers
- Consumers
- Statutory Bodies
- Employees
- Vendors
- Policy Makers
- Professional Bodies
- Public

Strategic factors are important considerations in setting the strategic direction and determining the business priorities.

What markets should we focus on? What should our strategy be in each?

Markets	Strategies
Finance Sector	Develop new relationships – provide comment on legislation development – promotional material – events - membership
Law	Develop new relationships – provide comment on legislation development – promotional material - events - membership
SME's	Develop new relationships – develop documentation
Private Sector	Develop new relationships – provide comment on legislation development – promotional material - events - membership
Government Sector	Be involved – already majority – maintain existing - provide comment on legislation development – promotional material - events - membership
Not-for-Profit Sector	Falls within SME's
Community Sector	Falls within SME's
Event Providers (e.g. IQPC, Ark)	Maintain existing / develop new relationships / joint initiative/ national professional develop opportunities
Education Providers	Accreditation and promotion – membership – involvement in competencies – outsourcing of expertise
Youth / Personnel	SIG – benefit of professionalism – branding products (website, video etc) – membership – networking – discount Young Professionals – youth roundtable – profiling – support

4. Strategic focus

Records and Information Management Professionals Australasia's board and executive management team regularly identify the key strategic issues facing the business. Analysis of the industry structure, regulatory environment, competitive position, business risk review, and stakeholder factors are key inputs in to the process of identifying strategic issues and determining strategic focus.

Strategic focus guides the development of strategies and related objectives, initiatives and action plans to achieve desired strategic outcomes in the areas of focus. In the recent past Records and Information Management Professionals Australasia has successfully achieved its objectives and the desired strategic outcomes.

The primary objective in identifying key strategic issues and determining strategic focus is to continue to deliver increased value to stakeholders.

The following strategic issues constitute the current strategic focus of the business :

- business development;
- understanding and meeting stakeholder expectations;
- improvement of business processes;
- people–culture and workforce planning; and
- regulatory environment.

The issue of competitiveness is related to each strategic issue. Looking ahead, Records and Information Management Professionals Australasia aims to strengthen its competitive position by developing strategies that incorporate:

- benchmarking;
- expanded product and service offerings;
- productivity and efficiency gains;
- technological change; and
- investment in research and development.
- Investment in education (professionalism)

The strategic issues are detailed in the next sections and are the focus for the forthcoming planning period. Strategies to achieve progress towards our objectives in these areas of strategic focus are detailed within the strategic performance objectives included in the Strategic Plan.

4.1 Understanding & meeting stakeholder expectations

Records and Information Management Professionals Australasia has a diverse range of stakeholders who often present competing requirements and expectations. In satisfying the needs of one stakeholder group, Records and Information Management Professionals Australasia must balance the requirements and expectations of other stakeholder groups.

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In response, Records and Information Management Professionals Australasia has identified a number of strategic factors important to each stakeholder group. These strategic factors are essential considerations in setting the strategic direction and determining the business priorities.

Over the planning period, Records and Information Management Professionals Australasia will sharpen its focus on strategic and operational planning and reporting to continue to maximise the opportunities for the business and drive creation of value for all stakeholders. Records and Information Management Professionals Australasia aims to improve the way it communicates with stakeholders about how Records and Information Management Professionals Australasia is meeting their needs and expectations.

4.2 Business processes

Records and Information Management Professionals Australasia aims to strengthen its focus on process improvement opportunities across the business. The continual improvement of key business processes will enable Records and Information Management Professionals Australasia to:

- satisfy stakeholder needs more efficiently;
- provide services more effectively;
- improve productivity; and
- deliver the professional development program.

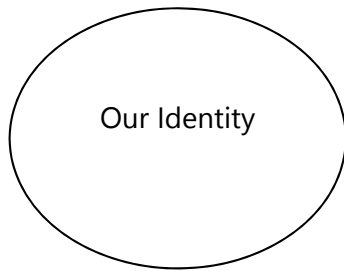
4.3 People–culture and workforce planning

Workforce planning remains a key strategic issue for Records and Information Management Professionals Australasia.

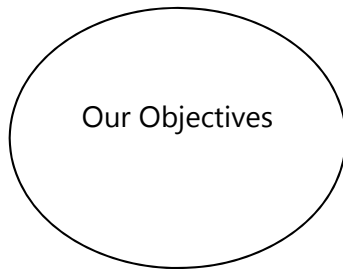
The company continues to focus on developing a workforce of competent, confident and committed professionals capable of meeting the technical and management challenges of rapid profession growth and renewal.

Going forward, the challenge is to position Records and Information Management Professionals Australasia as an association of choice by:

- balancing internal and external resourcing;
- enhancing people management practices;
- developing and retaining technical competencies;
- promoting a culture of leadership, innovation and accountability.



We are: The peak body representing professionals involved in records and information management. RIM Professionals Australasia is not-for-profit and delivers benefits to all its members.



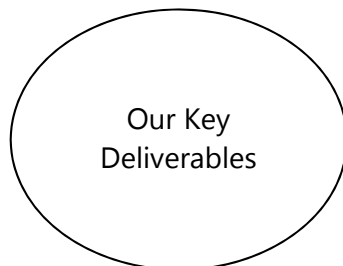
We exist to:

- Serve the public interest
- Promote professional interests
- Set standards of professional competency
- Provide professional development
- Disseminate records and information management ideas
- Promote an exchange of views
- Advocate for records and information management practitioners and the profession



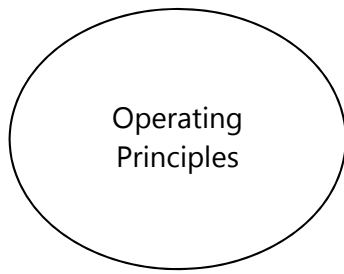
Our strategic priorities are:

- Advocacy
- Community
- Knowledge
- Governance



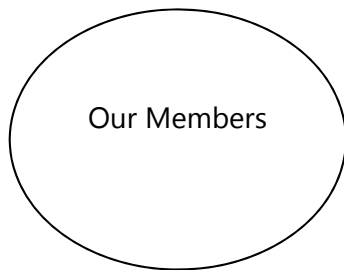
We will:

- Influence policy
- Advocate
- Foster high standards of professional education and development
- Provide valuable member services
- Operate efficiently and effectively



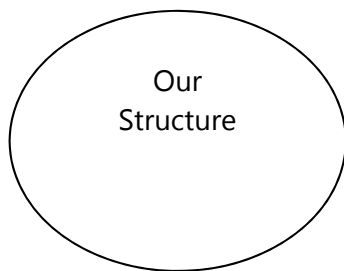
We operate to:

- Protect the public interest
- Pursue member interests
- Uphold professional standards
- Observe Codes of Conduct, Membership and Education
- Operate as a single entity
- Deliver locally relevant services
- Use assets wisely and not for profit
- Connect with the global community



Our members are:

- Professionally qualified and committed to lifelong learning
- Training for a professional qualification
- Vocationally trained
- Stakeholders in records and information management
- Responsible for compliance and governance of records and information management
- Work in a records and information management profession or discipline.
- Interested in quality records and information management



Our structure:

- Is determined by the RIM Professionals Australasia Constitution and By-laws.
- Overseen by a Company Board and Branch Councils.

More information can be obtained from the Constitution, Bylaws and other governance documents available on the RIM Professionals Australasia website – www.rimpa.com.au

5. Key Strategic Objectives

There are four (4) strategic performance areas:

- Advocacy
- Community
- Knowledge
- Governance

The four areas are expanded on in the following section.

Records and Information Management Professionals Australasia

Strategic Issues			
Advocacy	Community	Knowledge	Governance
Records and Information Management Professionals Australasia will facilitate effective dialogue amongst members, government, private sectors, legislative bodies and the public, collectively and individually to promote a better environment, expanded influence and a healthy future of Records and Information management profession.	Records and Information Management Professionals Australasia will cultivate and maintain relationships to better engage and support our members in strengthening the profession and supporting community expectations.	Records and Information Management Professionals Australasia will facilitate the sharing of knowledge by providing guidance, direction and expertise to enable RIM excellence. Encourage and support professional education and training of members, through development, accreditation and delivery of programs.	Records and Information Management Professionals Australasia will utilise effective management and fiscal responsibility to implement the Company's programs and governance framework to provide transparency and accountability.
Strategic Objectives			
<ul style="list-style-type: none"> Records and Information Management Professionals Australasia will leverage the value and image of the brand to advocate on behalf of the profession. Records and Information Management Professionals Australasia will facilitate the timely sharing of knowledge and information internally and externally. Records and Information Management Professionals Australasia will advocate on behalf of records and information professionals, and the profession, for best practice, accountability and transparency in all organisations – public or private. Records and Information Management Professionals Australasia will market its products and services to position professional members as the recognised leaders in records and information management. 	<ul style="list-style-type: none"> Support and develop emerging professionals and influence a preferred education path. Strive to expand the diversity of Records and Information profession to mirror the community we serve. To serve as the primary source of information for members and the community in Records and Information management profession. Records and Information Management Professionals Australasia will advocate to the public, government and business the value of the professional members and the profession. 	<ul style="list-style-type: none"> Records and Information Management Professionals Australasia will actively promote, improve and advise on professional standards in records and information management for, and on behalf of, members, the profession and the community. Records and Information Management Professionals Australasia will actively promote and advocate records and information management education. Records and Information Management Professionals Australasia will ensure the Statement of Knowledge demonstrates the values of records and information management professionals.. Records and Information Management Professionals Australasia will provide access to the information, knowledge and practice tools records and information professionals need. Records and Information Management Professionals Australasia will support the professional members commitment to continuing professional development. 	<ul style="list-style-type: none"> Records and Information Management Professionals Australasia will practice a model of good corporate governance. Records and Information Management Professionals Australasia will strive to provide excellence in customer service Records and Information Management Professionals Australasia will provide a healthy, positive work environment for staff, supported by technology, legal, financial and other essential resources. Records and Information Management Professionals Australasia will demonstrate an innovative culture, characterised by visionary planning, effective decision-making and discipline in fiscal accountability.

6. Advocacy

6.1 Objective: Provide leadership in records and information management and a framework for member, community and government advocacy.

6.1.1 Leadership:

Pathways:

- Share and collaborate on policy development
- Develop and launch policy statements
- Continue to support Government action
- Promote leading strategic policy development

- Promote policy through effective advocacy:
 - Submissions
 - Parliamentary hearings
 - Meetings with politicians, government officials
 - Meetings with industry leaders and stakeholders
 - Events and media launches
 - Communication to members
 - Participation in peak bodies

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Performance Indicators

1. RIM Professionals Australasia policies are contemporary, relevant and consistent
 - Review existing policies
 - Where appropriate, up-date and/or rewrite policies

2. RIM Professionals Australasia remains alert and responsive to issues which have an impact on Records and Information management profession and require a considered policy response
 - Actively monitor the political, records and information management, economic and social environment using a range of sources, including media, reports, Branch information etc.
 - Write new policies as required
 - Release company policy statements which initiate and/or respond to government, representative body and/or public debate

3. Members understand and have easy access to RIM Professionals Australasia policies on a wide range of issues
 - Updated policies are available on the website
 - New policies are available on the website
 - Members are actively informed about new policies or changes to existing policies

7. Advocacy

7.1 Objective: Influence stakeholders and raise the profile of records and information management practitioners and the profession.

7.1.1 Leadership:

Pathways:

- Seek adoption of policy by all tiers of government
- Participate in and influence Parliamentary and public inquiries
- Establish strategic partnerships to influence government, industry, stakeholders and the community
- Raise the profile and reputation of records and information management in the community
- Promote policy in the media, at events and to members
- Enlist the support of members as advocates for the profession

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Performance Indicators

1. RIM Professionals Australasia has developed strong lobbying networks in government, representative bodies and the media
 - Identify appropriate networks of associations, government, media and individuals
 - Identify and pursue opportunities to cement networks
 - Consistently record networking information
 - Put in place “alerts” to government enquiries, parliamentary hearings, events, launches etc.

2. RIM Professionals Australasia has built a profile as a commentator on social, economic and environmental issues
 - Respond to formal enquiries
 - Be actively involved in topical public debate with timely and consistent comment
 - Use RIM Professionals Australasia policies as a basis for advocacy
 - Actively seek opportunities to broadcast RIM Professionals Australasia policy views and positions
 - Contribute to Records and Information management profession and context internationally

8. Community

8.1 Objective: Delivery effective member communication and valuable, high quality services

8.1.1 Leadership:

Pathways:

- Grow RIM Professionals Australasia membership, reduce lapsing and increase member retention
- Actively promote the value of membership to members, non-members, employers and users of records and information management services
- Foster a strong customer service culture within RIM Professionals Australasia
- Communicate with members in a relevant, meaningful, timely and informative way
- Design events, conventions, study tours, awards, mentoring and other activities that are evaluated positively by members
- Regularly invite and act upon feedback from members
- Provide and promote non-records and information management services that add value to membership
- Encourage, support and acknowledge volunteer participation in RIM Professionals Australasia
- Continue to support and encourage young / emerging professionals

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Performance Indicators

1. RIM Professionals Australasia has an identifiable value proposition for members
 - Formally articulate RIM Professionals Australasia's value proposition(s)
 - Ask members what they value most in the company
 - As appropriate, act on feedback to tailor RIM Professionals Australasia offerings to member expectations and preferences
 - Contribute to Records and Information management profession and context internationally

1. RIM Professionals Australasia's value proposition is regularly reviewed to ensure continuing relevance and currency
 - Evaluate benefits in terms of members' stated preferences and expectations
 - Benchmark benefits in terms of value propositions offered by other associations
 - Conduct and document 'exit' interviews with lapsed members
 - Design events, conventions and other activities in line with member feedback

2. RIM Professionals Australasia has a continuing strong critical mass of members
 - Segment membership to match strategies with target "markets"
 - Develop specific marketing strategies to attract new members in all segments from new or young professionals through to established and experienced practitioners

9. Knowledge

9.1 Objective: Raise education and professional development standards and encourage people to enter and stay in Records and Information management profession

9.1.1 Leadership:

Pathways:

- Implement initiatives to address the skills shortage in records and information management
- Continuously evaluate and improve the CPD program
- Promote CPD to practitioners, employers and the community
- Develop, implement and continuously evaluate an education and PD framework and related audit systems
- Work with educational institutions to build professional education standards and accreditation models
- Build the professional capacity of records and information management practitioners
- Build robust, interactive relationships with educational providers

Performance Indicators

1. RIM Professionals Australasia 's professional development programs are publicly recognised
 - Target appropriate educational organisations and build organisations to accredit programs
 - Create and publish consistently high standards and processes for accreditation
 - Perform an ongoing audit of all professional development programs
2. All educational programs offered by RIM Professionals Australasia are relevant and actually increase the skill level and knowledge of participants
 - Explore innovative program offerings including both practical and contemporary subject matter
 - Ensure that subject material is "cutting edge"
 - As part of the general survey of members, ask for suggestion on educational interests
 - Explore opportunities for flexible learning including partnering arrangements, online learning etc.

10. Governance

10.1 Objective: Efficient and effective operations and financial management

10.1.1 Leadership:

Pathways:

- Manage Records and Information Management Professionals Australasia at all levels in accordance with strategic, operational plans and budgets
- Effective web-based member information and event management systems
- Stable management team and staffing
- Grow operating surpluses and members' equity
- Transition Records and Information Management Professionals Australasia into new Governance structure

Performance Indicators

1. RIM Professionals Australasia 's has a structure and budget which provide financial stability, resilience, protection of equity and efficient operations
 - Consistently meets the requirements of the Corporations Act 2001
 - Receive an unqualified external audit
 - Prepare RIM Professionals Australasia's budget and report on it annually