

In-Form Consult supports World Heritage Site to develop comprehensive records retention schedule

"We received a quality product which allowed us to meet our project deadline with minimum disruption for our information owners. In-Form Consult's expertise in SharePoint has provided valuable in-sight into potential pit-falls to avoid during our SharePoint implementation."

Jane McCarthy, Royal Botanical Gardens - Kew

About Royal Botanical Gardens - Kew

Founded in 1840, from the exotic garden at Kew Park in the London Borough of Richmond upon Thames, Kew is the world's largest collection of living plants housing more than 30,000 different kinds of plants. The herbarium, which is one of the largest in the world, has over seven million preserved plant specimens. The library contains more than 750,000 volumes, and the illustrations collection contains more than 175,000 prints and drawings of plants. In 2003, the gardens were put on the UNESCO list of World Heritage Sites.

Kew Gardens, together with the botanic gardens at Wakehurst Place in Sussex, are managed by the Royal Botanic Gardens, Kew, an international botanical research and education institution that employs 750 staff. Kew is a non-departmental public body sponsored by the Department for Environment, Food and Rural Affairs.

IFC Approach

IFC worked with Kew stakeholders to understand key functions, the records landscape at Kew and how these should be represented in the Retention Schedule. A structured approach was used based on IFC's SharePoint Information Architecture Methodology (SIAM) which leverages accepted best practice, industry standard models and IFC's extensive experience designing and implementing information architectures. Research and analysis was conducted of existing documentation, the outputs from a recent information audit, organisational information and Kew information governance frameworks.

IFC conducted workshops and interviews with each business area to identify records listings and these were assessed against the categories of functional classification in the Corporate File Plan to ensure alignment of these two key artefacts.



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IFC validated the legislative, regulatory and business retention requirements for all identified records series and consolidated the outputs to develop a comprehensive corporate retention schedule. This incorporated retention triggers and periods, records classifications and authorities/reasons for the selected periods, along with supporting guidance relating to documents (as opposed to records).

IFC then developed the Implementation Strategy Report which provide specialist advice relating to some of the critical components of a successful implementation for the Corporate Records Retention Schedule. This included guidance on topics such as roles and responsibilities, the Schedule review process and information security.

Business Challenge

The Royal Botanic Gardens, Kew (Kew) is an information rich organisation with ever increasing volumes of electronic information. Kew recognised improved information management and sharing as an enabler for enhanced productivity, income generation and compliance, and so an Information Management Systems (IMS) project was initiated to implement a solution based on MS SharePoint 2013 within Office 365. The objectives of the project were to:

- Enable the sharing of information assets within and outside the organisation
- Ensure the appropriate confidentiality of sensitive information
- Ensure information is current and accurate
- Ensure information is retained and disposed of appropriately

A key component of the project was to develop the information architecture framework and In-Form Consult (IFC) was engaged to support the development of the Corporate Records Retention Schedule for all Kew records. IFC was selected due to its long standing expertise in records management and detailed knowledge of current legislation including the Data Protection Act. An Implementation Strategy report was also required which detailed how the Schedule should be implemented across the organisation for both electronic records held in SharePoint 2013, and paper records.

"In-Form Consult made the development of a Corporate Records Retention Schedule a pain-free process. Our consultant used outputs from our information audit combined with interviews with a subset of key information owners to gather information."

Jane McCarthy, Project Manager

About In-Form Consult (IFC)

We are an independent information management consultancy that helps businesses transform enterprise wide information into a powerful business asset. We take a refreshingly pragmatic approach to helping companies uncover, manage and exploit information, transforming the value of both unstructured and structured content. Our complete solutions - encompassing consultancy, technology, training and resourcing - help to solve your holistic information management needs, help to drive innovation and create new business realities. Our consulting team are industry-leading experts in the areas of Information Management, Information Governance and Records Management; and specialists within Public, Private and Not-for-Profit sectors.

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The Results

The delivery of the Corporate Records Retention Schedule has provided Kew the foundation upon which records will be retained in a manner appropriate to their purpose. Storage costs can be minimised and Data Protection Act compliance increased through the disposal of records that are no longer needed.

IFC delivered a retention schedule that reflected the way in which Kew information will be filed and that is appropriate to the needs of the business, and this will support the management of those assets to fully realise their value, providing significant benefits to Kew.

Why IFC?

IFC were chosen using an open competition procurement process to ensure best value for money. The evaluation criteria considered expertise in Records Management and knowledge of the current information and records management legislation. Another important factor was the project management capability to deliver a quality product with minimal input from Kew.

IFC is an independent information management consultancy with over 28 years' of experience supporting businesses transform enterprise-wide information into a more powerful corporate asset.

IFC's solutions, which encompass consultancy, technology, training and resourcing services, support your complete information management needs. At IFC, our consultants have extensive experience providing objective advice and pragmatic recommendations to clients regarding:

- Information Strategy
- Information Governance
- Information Architecture
- Information Privacy and Security
- Information and Knowledge Management Technology
- Electronic document and records management system (EDRMS) implementations

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The logo for Kew, featuring the word "Kew" in a large, green, serif font. To the right of the text are three stylized green leaves of varying lengths and curves.

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