

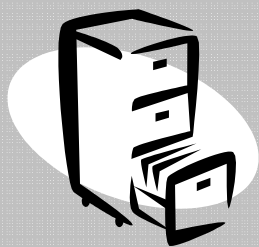
## OVERVIEW OF PROFESSIONAL SERVICES

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Information is the lifeblood of modern government and business. Without effective processes to manage information throughout its life cycle, costs will increase and productivity will decrease. Your organization may run the risk of not being able to meet legislated requirements, or you may find yourself on the losing end of a court decision, one you wouldn't have lost if you had access to the right information at the right time.

If you are building a new information management program, need to know how (or if) your existing program is functioning, or require improvements to certain elements of an otherwise effective program, we can help.

CONDAR Consulting Inc. is a product-independent information management consulting firm. We are based in Ottawa, with another office in Southern Ontario. We have been providing high-quality advisory services to our clients across Canada since 1991.

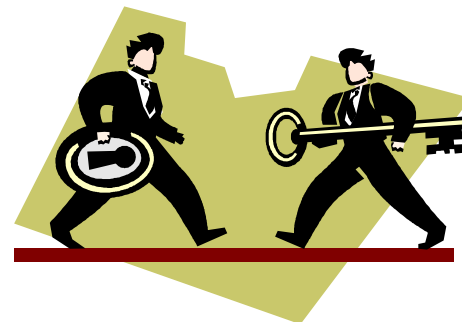
CONDAR prides itself on providing practical advice on information management challenges. Information theories have their place, but it has been our experience that – in the short

term – they do not help managers improve productivity or reduce costs.

We also take this pragmatic approach to the implementation of technology in the workplace. If advanced information management software is the best solution for your organization, we will tell you that. However, if you can improve productivity and solve operational problems with simple procedural changes or a more disciplined approach to managing information, we will tell you that first.

CONDAR has three main service lines:

- **Information Management Program Development**
- **Audit and Review Services**
- **Managing Change**



## Information Management Program Development

- **Evaluation, design and implementation of corporate information management tools**

We can evaluate your current practices and systems and recommend components of the system that need to be added, re-designed or updated to reflect your current needs. CONDAR is experienced in the design and implementation of a broad range of tools that will help your organization manage information throughout its life cycle, including:

- ❖ information classification systems
- ❖ retention and disposition schedules
- ❖ e-mail and records management policies
- ❖ essential/vital records identification and protection

Since CONDAR's earliest days, this has been a company specialty. We practically invented the function/activity method of organizing information and have been working with this approach using our proprietary methodology since 1991. However, we do not limit ourselves: whatever is best for the client is what we develop.

Our approach to tool development is iterative and consultative in nature. This leads to user "buy-in" and reduced training costs.

- **Review and improvement of workflow, methods and procedures**

We can assess and offer recommendations to improve your current workflow, methods, and procedures to help you make them more effective and efficient.

Integrating manual records and document management methods into an advanced technology environment can create significant problems for inexperienced people: our team is well-versed on the issues you will face and has strategies for alleviating these problems.

- **Plan and Policy Formulation**

Our team can provide valuable insight and help you define the strategic direction for your information management program.

We can provide analysis of your current organizational structure, determine if it can effectively deliver the services you need to provide, and offer recommendations on how to plan for the future. Additionally, if you need revised mandate statements, position descriptions or test questions, we can help.

Resource planning is an essential element of any long-term plan. CONDAR can help you determine present and future resource needs for space, equipment, costs and people.

- **Development of user requirements and functional specifications**

Our team can assess the functional requirements for a recorded information management software application as well as document the technical specifications. From this, we can prepare Requests for Information, Requests for Proposal, help you to evaluate the responses, and oversee implementation of the chosen solution.

We are product-independent and do not have an "information technology" mindset (where technology can trump actual business requirements). CONDAR always ensures that the best solution for a client is chosen; we will not recommend you acquire technology you do not need.

- **Identification of training needs and development of training programs**

An essential component of any project we undertake is "knowledge transfer". After the consultants leave, will you be able to maintain and further develop your tools? Will the staff be aware of the downstream implications of a particular plan? Typically, this knowledge transfer is a continuous process during the entire life of the project. We work with the people involved to ensure they understand what we are doing and why we are doing it. This reduces the need for, and expense of, formal training at the end of the project.

Our experts in adult education can tailor a training product to your requirements, using your organization as a model for examples and work group assignments. CONDAR will assess your training and education needs, develop appropriate *curricula* and deliver the training (in English and/or French).

- **Operational support**

In an ideal world, every organization would have a person or group dedicated to the management of that organization's information. This is not an ideal world. Smaller organizations simply cannot afford to dedicate a resource to this vital function. One person is made responsible for planning, implementing and monitoring the IM program, but only for a small portion of the day. This is unworkable in the long run.

Many companies are outside major centres and do not have access to educational services or traditional consulting services without spending a lot of money on travel and accommodations.

Sometimes, companies find themselves with a staff vacancy and know it will take several months to fill the position with a qualified person.

For all of these scenarios, CONDAR can help. Our "Virtual Records Management Services"™ (VRMS™) can provide customized, off-site (telephone, e-mail) support for your information management operations. For staffing shortfalls, we can place a qualified, well-supported person in the position until you find one of your own.

## Audit and Review

Everyone knows, or should know, the importance of information to an organization's well-being. However, information that is badly organized – hard to find, onerous to manage, in the wrong medium or too expensive – can do more harm than good. If your employees do not know what they should keep, what they can discard, or how to capture and preserve information, the problems can become even more complicated, expensive and dangerous.

- ❖ Is your records and information management program working?
- ❖ Is it cost-effective?
- ❖ Are your clients satisfied?
- ❖ Is your organization meeting all of its legislative and regulatory requirements?
- ❖ Can you document your business decisions well enough for a court to accept them?

CONDAR can help you answer all of these questions.

### • Diagnostic Assessment and Gap Analysis

The first step in solving a problem is identifying exactly what the problem is. However, this is not as easy as it may seem. Often, the symptoms are clear – problems finding information, incomplete files, loss of corporate memory, complaints from clients – but the cause (or, more typically, causes) is not.

CONDAR's suite of Diagnostic Assessment Tools is designed to identify the root causes of any "information malaise". We can undertake any or all of the following steps:

- ❖ clearly delineate and describe where the problems originate, and why;
- ❖ identify best practices and conduct a gap analysis for your information management (IM) program; and/or
- ❖ complete a threat-risk analysis for your information security (electronic and paper).

Through interviews, checklists, questionnaires, on-site analysis, documentation review and other investigative methods, we will conduct a thorough analysis of your existing practices, detail what the best practices for an organization like yours should be, and quantify the gap. The consequences of not addressing the gaps will also be described.

If desired, we can provide you with an action plan for remedying any shortfalls and prepare briefings for your senior management or Board of Directors.

Our experience with hundreds of projects over the past seventeen years has given us a superb base of information upon which to rate an organization's information management practices. We have seen good and bad information management practices and can apply this experience and knowledge (what to do, what not to do) to your particular situation.

### • Legislative and Regulatory Compliance

- ❖ What legislation affects the way you manage your documentation?
- ❖ Are you in compliance with these laws?
- ❖ If audited or sued, could you defend your actions appropriately?
- ❖ Is your information management program adhering to generally-accepted international and national standards for managing information?

Recent information management débâcles have heightened awareness of the importance of complying with appropriate legislation and regulations.

Our team is thoroughly versed in what requirements accrue to what types of organizations and how to best meet these requirements. Following are just some of the standards and legislation you may be subject to, or whose recommendations you may want to follow:

- ❖ ISO 15489 - International Standards Organization Standard on Records Management
- ❖ Access to information and privacy protection legislation (federal, provincial and municipal)
- ❖ Policy on Information Management (Canadian federal government)
- ❖ CGSB Standard on Electronic Documents as Documentary Evidence
- ❖ Federal/Provincial/Territorial Evidence Acts
- ❖ Library and Archives of Canada Act

The list goes on. You may not know what applies to you and what doesn't: we do.

### • Threat-Risk Analysis

We live in a more complex world than previous generations had to face. With this complexity come many benefits but also many risks. Thirty years ago, a disgruntled employee would have had to take customer files out in a truck. Now, with a click of the mouse, your customer files could be sitting in a competitor's in-basket. A computer virus could destroy your accounts receivable file. Poor information management practices could lead to your confidential salary files being unintentionally sent to all staff. Are you prepared for the consequences of such an error?

Human error or malfeasance is not the only danger: fire, flooding, and other natural disasters (such as an ice storm) may damage your records or prevent you from accessing them until it is too late. You need to identify your essential records (electronic, paper, microfilm) and protect them appropriately. We can help you set the criteria for determining what is vital and help you balance the cost of proper protection versus the risk of doing nothing.

We will analyze external and internal threats, quantify the risk to your organization's well-being, and devise a plan for remedying the shortfalls.

## Managing Change

It is common knowledge that change, big or small, can be a challenge. Successful change is most likely to occur when organizations manage not only the information management and technology issues but also the human issues.

If the human factor is not well managed, changes, no matter how good, will meet with resistance.

There are three fundamental reasons why change is not met with open arms:

1. Records and information service providers are afraid of change. They have become entrenched in traditional methodologies and are either afraid to embrace new concepts or simply do not understand them. The changes being faced by today's records management practitioners are dramatic. The move to function/activity based classification structures and the introduction of electronic document management solutions are posing challenges. As we progress further down the chain of command, the more daunting these tasks can be.
2. The records and information users are also afraid of change. They fear that change will disrupt their work patterns. They are afraid that they will not be able to find their information when they need it. In response, they hoard their records and are slow to cooperate. Or worse – they feign cooperation but, in the end, do not embrace the change.
3. The decision-makers are not afraid of change. They are, however, conscious of the cost of change and have not been convinced of the true importance of good information management. Until they truly understand the issues and see their information assets on the same strategic level as their financial, human and capital assets, the necessary support will not be forthcoming.

Change needs to be introduced in a holistic fashion. This means that, in addition to managing system development and implementation according to best practices, you must also manage the cultural impact of change. CONDAR can help you develop and implement a strategy to deal with this 'human' side of change. Properly introduced, a new system can deliver all the hoped-for benefits.

### • Decision-Makers, Senior Management

In spite of the increasing awareness of the need for good information management, there are still many in the senior ranks who fail to embrace this notion. They 'talk the talk' but don't 'walk the walk'. Managers need to be completely convinced of the importance of the information management program.

There have always been two compelling reasons for implementing change in the records and information management domain. The first reason is the legal/regulatory requirement. Sometimes we do things because laws or

policies tell us that we have to – and sometimes the consequences of not doing so can be very serious. The second reason is the potential for improved performance and cost reduction/avoidance. Managers need to focus on the importance of good IM/RM. Issues such as stewardship and accountability for information should be an integral part of business processes (and not an afterthought) and linked to performance measurement.

CONDAR can help you build a case to substantiate your request for greater commitment and increased resources in order to implement best practices in your IM/RM program. We will prepare and deliver a presentation to your management team or we will coach you as you do it yourself.

### • Users

Records users are always the wild card. As the saying goes, 'you can lead a horse to water, but you can't make him drink'. The challenge is to make the water palatable and enticing.

The organizations that have the greatest success are those that involve the users early and often. Often the users find out about things after the fact or the communications are sporadic. And often, they are expected to sit through long and boring information sessions that present more information than they need or care to know.

CONDAR will help you develop a strategy and the appropriate tools to communicate to, and with, the users before, during and after implementation.

### • Records Management Service Providers

Regardless of the service delivery model and to whom the RM service providers report, they are often ill-equipped to deal with change. With the widespread use of electronic document management systems and new concepts in information classification (function/activity-based), many of those who provide the service feel inadequate and intimidated.

CONDAR knows and understands this dilemma and can help you deal with this situation through sound planning and the development and delivery of orientation and training sessions. These tools can be generic and/or custom-built to meet your specific requirements.

