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Records and Information Management Experience

For over thirty years, I have provided records and information management (RIM) services to a wide variety of organizations. The majority of my work has been with the provincial, territorial, regional, local and First Nations governments. I have also worked with societies, universities and private corporations.

My experience involves practically all aspects of records and information management including: assessing RIM programs and drafting strategic plans for their improvement; developing RIM policies, procedures, manuals and forms; providing training in RIM theory, functions and activities; custom development of Records Classification and Retention Schedules (RCRS), reviewing and/or amending existing RCRS, including British Columbia's provincial *Operational Records Classification Systems* (*ORCS*) and *Administrative Records Classification System* (*ARCS*). I have created my own custom broad functional (aka "big bucket") classification and retention template.

I hold a Bachelor of Arts and Science degree (English and Physics, 1991) and a Master of Arts degree (English, 1994). I am certified in Generally Accepted Recordkeeping Principles® (aka Information Governance Principles). I am a founding member and current president of the Vancouver Island Chapter of ARMA (Association of Records Managers and Administrators). I have given numerous seminars locally, provincially and nationally.

Clients and Projects

Victoria Christian Reformed Church

* Draft RCRS — June/26 – current
* Review, classify and apply disposition processing to 60+ physical boxes
* Assist in data migration from legacy database to recently purchased database

Haisla Nation

* Draft replacement RCRS — June/26 - current
* Amend RIM Policies — June/26 - current
* Review existing RIM policies and RCRS — May/26

Cadence Solutions

* Test AI auto-classification functionality against municipal record sets — May -Dec/25

Pension Board Secretariat (PBS)

* Review and update RCRS and Information Governance Policies and Procedures — April/25 – Feb/26
* Review and update Information Governance Policies and Procedures — June – Oct/20
* Customize *ARCS* and develop *ORCS* — Oct/13 - March/14
* Create Information Governance Policies and Procedures
* Research and recommend File Management System (FMS)
* Project Lead for Implementing *ARCS ORCS* in physical & digital repositories
* Develop & deliver Basic and Advanced RIM Training

Labour Relations Board

* Draft broad functional records classification system — March/25 – March/26
* Draft RIM policies

Canada-Nova Scotia Offshore Energy Regulator

* Draft broad functional records classification system — Dec/24 – April/25

Peace River Regional District

* Draft RIM policies — Dec/24 – March/25

Ministry of Tourism, Arts, Culture and Sport, Marquee Sport Events

* Draft *ORCS* and customize *ARCS* — Nov/24 – Jan/26

District of Saanich
* Review RCRS — July/24 – Jan/25
* Amend RCRS

City of Dawson Creek and *City of Nanaimo*
* Updated Legal Citations and Classifications in RCRS — Aug - Oct/26
* Updated Legal Citations and Classifications in RCRS — July - Aug/25
* Updated Legal Citations and Classifications in RCRS — June/24
* Updated Legal Citations and Classifications in RCRS — July/23
* Updated Legal Citations and Classifications in RCRS — Aug/22
* Updated Legal Citations and Classifications in RCRS — June/21
* Updated Legal Citations and Classifications in RCRS — July/20

Environmental Assessment Board Tribunal Cluster
* Draft ORCS — Feb/24 – Jan/25

Mental Health Review Board
* Draft broad functional records classification system — Jan - Sept/24
* Draft records management policy to address gaps in BC Government's RIM policies

BC Human Rights Tribunal
* Draft broad functional records classification system — Dec/23 – Oct/24
* Draft records management policy to address gaps in BC Government's RIM policies

Office of the Information and Privacy Commissioner, Registrar of Lobbyists and Corporate Shared Services
* Draft 2 *ORCS* and customized *ARCS* — Aug – Nov/23

City of Nanaimo
* Reassess RIM program and provide recommendations — Aug/23 - Feb/24

Cowichan Valley Regional District
* Drafting corporate level RIM Policies and Procedures — Dec/22 – July/23

British Columbia Transit
* Draft broad functional, electronic oriented ORCS — Dec/20 – May/23
* Advise on RIM program implementation in SharePoint

Tribunals, Transformation, and Independent Offices Division
* Conduct RIM Program Reviews and Draft RIM Road Map for 12 Tribunals — Jan/23 – Mar/23

First Nations Public Service Secretariat
* Co-draft First Nations RIM Toolkit with multiple chapters over two volumes — Oct/21 – March/23
* Co-develop and deliver three 3-hour basic RIM training sessions for First Nations — Aug/20 – Feb/21

Village of Cumberland
* Researched Scanners — Sept - Dec/22
* Updated RIM Policies and Procedures
* Provided Cumberland RCRS first draft

SaskCentral - Credit Union Central of Saskatchewan
* Reviewed and Critiqued Records Retention Schedule — Aug - Sept/22

Public Sector Employer's Council Secretariat
* Customize *ARCS* and draft *ORCS* — April/21 – May/23

Employment Standards Branch
* Draft *ORCS* — Dec/21 – Oct/23

Halfway River First Nation [project incomplete]
* Create RIM band council resolution and RIM policy — May – Aug/21
* Draft broad functional, electronic oriented RCRS
* Review First Nations related legislation and regulations
* Draft RIM Manual
* Implement RIM Program

University Neighbourhood Association
* Review RIM program — Nov/20 – Dec/21
* Provide RIM assessment based on Information Governance Principles
* Draft RIM strategic plan
* Create RIM policy
* Draft broad functional, electronic oriented RCRS
* Develop RIM manual

City of Nanaimo
* Advice and direction during RCRS implementation — July/20 – Oct/21

Office of the Registrar of Lobbyists
* Draft ORCS — Feb/20

View Royal
* Advice and direction for RIM implementation in a SharePoint environment — Dec/19, Oct/21

Wei Wee Kum First Nation
* Create Records Management Policies and Procedures — Dec/19 – March/20

Royal BC Museum
* Draft Privacy Impact Assessment — Nov/19 – Feb/20

Regional District of Nanaimo
* Create Records Management Policies and Procedures — Aug – Dec/19
* Analyze and provide report on suitability of draft RCRS

City of Fernie
* Assess RIM program and draft RIM strategic plan — July/19 – Sept/20
* Provide draft records management bylaw
* Create Records Management Policies and Procedures
* Draft broad functional, electronic oriented RCRS

Saskatchewan Tribal Council: Educational Unit [project incomplete]
* Create Records Management Policies and Procedures — March – May/19

Auditor General for Local Government
* Create Implementation plan — Jan - Sept/19
* Create Records Management Policies and Procedures
* Draft ORCS

Sail and Life Training Society (SALTS)
* Create Records Management Policies and Procedures — Nov/18 – May/20
* Draft broad functional, electronic oriented RCRS

Royal BC Museum [project on hold due to Provincial Government backlog]
* Amend ORCS for ongoing approval process — July/21 – March/22
* Draft ORCS while assimilating two approved ORCS and one draft ORCS — Oct/18 – June/20

City of Dawson Creek
* Provide draft records management bylaw — Aug/18 – Dec/20
* Create Records Management Policy
* Draft broad functional, electronic oriented RCRS
* Develop records management Manual

City of Nanaimo
* Draft broad functional, electronic oriented RCRS — March/18 - Dec/19
* Create Records Management Policies and Procedures
* Provide RIM training to city managers and records staff

Climate Action Secretariat
* Implement RCRS into shared drive environment — Feb/18 – Jan/21
* Draft broad functional, electronic oriented ORCS

City of Whitehorse
* Develop File Tracking Spreadsheet and Instruction Manual — Dec/17 – July/20
* Create Records Management Policies and Procedures
* Provide draft records management bylaw
* Draft broad functional, electronic oriented RCRS

Regional District of Nanaimo
* Analyze and provide report on suitability of existing RCRS — Nov/17 – July/18
* Assess RIM program, draft RIM strategic plan

City of Dawson Creek
* Assess RIM program, draft RIM strategic plan — Sept/17 – Jan/18

Kwanlin Dün First Nation
* Draft broad functional, electronic oriented RCRS — Aug/17 – Jan/18

Greater Victoria Housing Society
* Implement RCRS into physical and SharePoint Online environments — July/17 - Aug/19
* Develop File Tracking Spreadsheet and Instruction Manual
* Create Records Management Policies and Procedures
* Draft broad functional, electronic oriented RCRS
* Establish naming conventions in association with the RCRS

City of Nanaimo
* Assess RIM program and draft RIM strategic plan — July - Oct/17
* Provide RFP requirements for EDRMS RFP

Yukon Government
* Test the potential government wide adoption of a broad functional RCRS — March – July/17

District of Tofino
* Create Records Management Policies and Procedures — Dec/16 - Aug/17
* Draft broad functional, electronic oriented RCRS

Strathcona Regional District
* Develop Records Management Policies and Procedures [project incomplete] — Dec/16 - June/17
* Draft broad functional, electronic oriented RCRS [project incomplete]
* Review draft records management bylaw

Yukon Government
* Provide draft RFP for EDRMS — Dec/16 - Jan/17

Cowichan Valley Regional District
* Assess RIM program and draft RIM strategic plan — Oct/16 - Aug/17
* Develop business plan for Corporate Records Officer position

City of Whitehorse
* Assess RIM program and draft RIM strategic plan — Sept/16 - Jan/17

Municipal Pension Board Secretariat (MPBS) [projects incomplete]
* Customize *ARCS & ORCS* — July – Oct/16
* Create Records Management Policies and Procedures
* Research and recommend File Management System (FMS)

Peace River Regional District
* Assess RIM program and draft RIM strategic plan — July/16 - Jan/17

Village of Cumberland
* Create Records Management Policies and Procedures — July - Dec/16

Kwanlin Dün First Nation
* Assess RIM program and draft RIM strategic plan — April - Aug/16

Building and Safety Standards Branch
* Design *ORCS* — April - Sept/16

Strathcona Regional District
* Assess RIM program and draft RIM strategic plan — Dec/15 - May/16

Comox Valley Regional District
* Assess RIM program and draft RIM strategic plan — Sept - Dec/15

Village of Cumberland
* Provided RIM program implementation plan — Oct/15
* Review, comment and provide recommendations on current information management program

District of Tofino
* Assess RIM program and draft RIM strategic plan — Sept/15 - May/16
* Create Records Management Policies and Procedures [project completed later]

Potash Corporation of Saskatchewan
* Review, comment and provide recommendations on RIM program — Aug – Oct/15

Morrison Hershfield
* Review current RIM documentation and file folder structure — July - Oct/15
* Provide road map to become a "paperless" office

Greater Victoria Harbour Authority
* Create Naming Conventions and Best Practices — March - May/15

City of Langford
* Create RIM Policies and Procedures — Dec/14 - Sept/16
* Research and draft Scanning Procedures Manual
* Draft functional, electronic oriented RCRS

Corporate Shared Services, Office of the Ombudsperson
* Customize *ARCS* — Dec/14 - March/15
* Create Information Governance Policies and Procedures — March/14

Saskatchewan Pulse Crop Development Board
* Develop *RCRS* — July/13 – Jan/14
* Provide RIM strategic plan

Provincial Health Services Authority (PHSA)
* Develop *ARCS Supplement* April/13 - Jan/14

The Office of the Merit Commissioner
* Customize *ARCS* and develop *ORCS* Feb/13 - Feb/14
* Create Information Governance Policies and Procedures
* Deliver Information Governance Training
* Implement *OMC ARCS/ORCS* in physical and digital repositories

The Mosaic Company, Potash Division
* Assess RIM program and draft RIM strategic plan Sept/12 – Jan/13

Ministry of Finance - Banking/Cash Management Branch
* Amend the Banking and Cash Management *ORCS* March/12 – June/13

Capital Regional District (CRD)
* Project lead for the implementation of the CRD RCRS (paper records only) Sept/11 – Dec/13
* Create Records Management Policies and Procedures
* Develop basic and advanced RIM Training Manuals
* Provide basic and advanced RIM training

Crown Investments Corporation of Saskatchewan (CIC)
* Research and develop basic and advanced RIM policies and procedures Aug/11 – Jan/13
* Develop basic and advanced RIM Training Manuals
* Provide basic and advanced RIM training

District of Saanich
* Simplify and clarify Saanich's RCRS July/11 - Dec/13
* Provide ongoing advice and consulting services
* Provide informal needs assessment

Natural Resources Authorization Service - Forests, Lands and Natural Resource Operations
* Develop ground-breaking multi-ministry *ORCS* [project incomplete] July/12 - March/15
* Research implications of multi-ministry ORCS Oct/11 - Feb/12
* Provide report and recommendations on developing an ORCS with multi-ministry implications

Meadow Lake Tribal Council (Saskatchewan)
* Develop and deliver basic and advanced RIM training April - June/11
* Informal RIM needs assessment and RIM plan

Ministry of Finance
* draft and amend Property Taxation and Revenue management *ORCS* Jan – June/11

Office of Research Services, University of Victoria
* Create coding system for electronic and physical filing Aug/10 - June/11
* Information management training for all staff members

Capital Regional District (CRD)
* Redesign LGMA RCRS to CRD RCRS Sept/10 – March/11

Yukon Government
* Functional classification interviews and development Novr/10 – Oct/11
* Functional classification training for information management staff

Kennecott Utah Copper
* Assess RIM program and draft RIM strategic plan Sept – Nov/10

Sechelt Indian Band
* Review Sechelt Indian Band's version of the LGMA RCRS Jan/10

Town of View Royal
* Review View Royal's version of the LGMA RCRS Nov/09

Town of Sidney
* Review Sidney's version of the LGMA RCRS Oct/09

Ministry of Small Business and Revenue
* Draft and amend all the *ORCS* for the ministry Sept/08 – March/09

Ministry of Finance - Banking/Cash Management Branch
* Draft *Banking and Cash Management ORCS* May/08 – June/10

Municipality of Colwood
* Oversee the implementation of the LGMA RCRS Sept/07 – July/08
* Customize and repair the Local Government Management Association's (LGMA) records classification system

Provincial Government's Privacy and Legislation Office
* Draft the *Information and Privacy ORCS* July/07 – July/08
* Oversee the implementation of the I*&P ORCS* and *ARCS*

BC Investment Management Corporation
* Create classification for Private Placements and template for further classifications July – Dec/07

Ministry of Forests
* Research and classify structured data in all known ministry databases May/07 – March/09

Ministry of Environment – Water Stewardship Division
* Review RIM program March/07

University of Victoria
* Review RIM program Feb – June/07

Island Medical Program
* Drafted and Implement customized records classification system July/06 – Sept/07
* Develop RIM policies, procedures, guidelines and tools

Ministry of Agriculture and Land - Integrated Land Management Branch (ILMB)
* Draft *Base Mapping and Geomatic Services ORCS* Sept/04 – April/08

Ministry of Agriculture and Land - Integrated Land Management Branch (ILMB)
* Create *Front Counter BC ORCS* Sept/04 – April/07

Environmental Assessment Office (EAO)
* Amend *ORCS* June/04 – Dec/06

Ministry of Water, Land and Air Protection (WLAP)
- Environmental Stewardship Division (ESD) - Parks and Protected Areas (was BC Parks)
* Draft *BC Parks ORCS* July/03 – Feb/09

Office of the Comptroller General (OCG)
* Draft *OCG ORCS* April/04 – Dec/06
* Technical lead and trainer for the conversion of all records in order to
  - implement the new *ORCS*, and
  - prepare staff and records for the implementation of the Enterprise Document and Records Management System (EDRMS) known as TRIM (Total Records and Information Management)

Ministry of Tourism, Sport and the Art- Archaeology Branch
* Create *ORCS* Sept/04 – Nov/05

Ministry of Human Resources
* Create *ORCS* April/03 – Nov/04

Sustainable Resource Management
* Create multiple *ORCS* April/03 – March/04

Office of the Comptroller General - Procurement Governance Office
* Amend *Procurement ORCS* March/03 – March/04

Ministry of Human Resources
* Perform Client File Format Review Jan – March/03

Ministry of Management Services
* Establish LAN filing structure with security levels and file naming conventions Dec/02 – May/03
* Create and present RIM orientation and training on electronic file organization

Office of the Comptroller General - Corporate Accounting System (CAS)
* Create *CAS ORCS* May/02 – March/03

Sustainable Resource Management
* Conduct RIM Inventory for Resource Management Division March/02

Risk Management Branch
* Draft *ORCS* as needed for new program areas May/01 – March/02
* Establish LAN filing structure, permissions and naming conventions
* Create and present RIM orientation/training on new electronic file organization

Information Science and Technology Agency
* Create *ORCS* Nov/99 – March/01
* Assist with development of the *BC Archives ORCS*
* Create and implement shared drive filing structure

Immigration Policy
* Develop *ORCS* Jan – March/00

Partnership Management Office
* Develop *ORCS* Sept/99 – Feb/00
* Create and implement shared drive filing structure

BC Ferries
* Train staff in RIM procedures May – Sept/99
* Sort accession/application tracking system
* Process thousands of boxes for final disposition by assigning *ARCS*/*ORCS* schedules to files and completing required paperwork

Tourism British Columbia
* Develop *ORCS* April/96 - April/99
* Handle receipt of file transfer from Small Business, Tourism and Culture during creation of Tourism British Columbia as a crown corporation
* Create accession/application tracking system
* Interpret and explain RIM procedures to staff
* Participate in the Ministry Records Officer Committee, the Crown Records Management Council and the Files/Volumes subcommittee
* Examine and correct forms and documents submitted by staff
* Implement *ARCS*/*ORCS*, including conversion of old *ORCS* to new
* Manage all aspects of classifying, filing, archiving and retrieving records
* Create and deliver RIM training for all staff
* Archive *ARCS*/*ORCS* for Tourism BC's Tourism Operations branch
* Reorganize file systems for Tourism BC's Tourism Operations branch
* Conduct inventory of Tourism BC's assets
* Research and create Tourism Industry Key Contact database on Access

* Adapt Access database to WinFax for purpose of mass fax communication
* Wrote manual for maintenance and use of database and fax program

Small Business, Tourism and Culture

* Implement *ARCS* for personnel department — March – April/96

Islands Trust

* Research email and internet connection for office of 25 staff — Jan – March/96
* Reformat Islands Trust Policy Manual with electronic access features
* Assist with filing, FOI searches and tracking of requests

Superior Propane

* Reorganize filing system and filing — Fall 1993 – Dec/94

References available upon request