

Digitization of Records: Process, Challenges and Triumphs of Electronic Documentation and Records Management Systems

Student ID: 213471

Executive Diploma in Municipal Management

January 2022

Table of Contents

Executive Summary.....	3
Listing of Acronyms.....	4
Scope & Methodology	5
Section 1: Process	6
The Legal Framework	6
Municipal Freedom of Information and Protection of Privacy Act (MFIPPA).....	6
Municipal Act.....	7
Planning.....	7
Records Retention By-law	9
Software Selection.....	10
Implementation.....	11
Section 2: Challenges	12
Change Management	12
Staff Buy In	13
Sheer Workload and Time Constraints	14
Section 3: Triumphs	16
Centralization	16
Traceability	16
Collaboration.....	17
Sustainable Growth.....	18
Conclusion.....	20
References	21

Executive Summary

Records are a valuable corporate asset that are often overlooked. Records support decision making, government transparency, minimize litigation risks and ensure regulatory compliance.

There are laws surrounding the keeping of secure and organized municipal records.

Municipalities have to do their due diligence to ensure that their records are safe and in order.

This means that Records Management must be a top priority for municipalities. Municipalities should to have a records retention by-law in place first, then decide how is best to store their records.

This is where digitization comes in. Digitization is not without its challenges. There is significant up-front planning, software selection, change management, staff buy-in, and the sheer workload and time constraints.

These challenges, however, are surmountable, as we will see in this remainder of this paper. There are also many triumphs that make the project of digitization very much worthwhile.

Centralization, traceability, collaboration and sustainable growth are all incredibly valuable assets in the digitization of records. Thus, even though the digitization of records is a major undertaking, municipalities have a due diligence to ensure their records are secure and accessible.

Digitization of records is well worth the time and effort.

Listing of Acronyms

AMCTO	Association of Municipal Clerks and Treasurers of Ontario
AODA	Accessibility for Ontarians with Disabilities Act
EDMS	Electronic Document Management System
FOI	Freedom of Information
MFIPPA	Municipal Freedom of Information and Protection of Privacy Act
OCR	Optical Character Recognition
PHIPA	Personal Health Information Protection Act
TOMRMS	The Ontario Municipal Records Management System

Scope & Methodology

The scope of this report is to prove that digitization of records is worth the time and effort spent to implement change management, convert records and overhaul the records management system. Digitization is defined as the process of converting hard copy or non-digital record into digital format. This report will give an overview of converting to EDMS, the legal framework, planning and implementation. The report will then move on to discuss challenges to digitization, including change management, staff buy in, sheer workload and time constraints. The report then moves on to discuss triumphs of digitization, including centralization, traceability, collaboration, and sustainable growth.

Methodology used in creating this report includes research of municipal level government industry standards and best practices through several channels including interviews with records management staff, survey of a group of records management professionals. An interview was also conducted with an AMCTO educator on the topic of records management and digitization. Research was further undertaken through the internet for insight into digital records management in both the private and public sector.

The author of the paper has been the Deputy Clerk for the Township of Blandford-Blenheim since 2018 with focus on digital records management. Prior to that was the Administrative Assistant since 2012 with focus on Cemetery Records. As such, factual and anecdotal evidence from the Township of Blandford-Blenheim perspective will be included throughout the report. Blandford-Blenheim is a lower tier municipality of about 7,500 people in a mostly rural and small village setting. The Township employs about 200 staff including office administration, public works, community services and volunteer fire fighters. Our experience with digitization of records, beginning in 2018 provides relatable discussion points.

Section 1: Process

The Legal Framework

There are several reasons that municipalities want to ensure their records are in order and easily accessible. The legal framework for the keeping of records is one of the main reasons. Digitization of records can allow for better document retrieval and ensure that records are kept in an organized and secure manner. Both the Municipal Freedom of Information and Protection of Privacy Act and the Municipal Act are relevant when discussing municipal records and deciding upon digitization.

Municipal Freedom of Information and Protection of Privacy Act (MFIPPA)

The purpose of MFIPPA is to provide a right of access to information in so far as information should be available to the public, exemptions to this ought to be limited and specific and decisions should be reviewed independently of the institution. The second purpose of MFIPPA is to protect the privacy of individuals with respect to their personal information.

Under MFIPPA, a record is defined as any record of information however recorded whether in printed form, on film, by electronic means, or otherwise and includes,

(a) correspondence, a memorandum, a book, a plan, a map, a drawing, a diagram, a pictorial or graphic work, a photograph, a film, a microfilm, a sound recording, a videotape, a machine-readable record, any other documentary material, regardless of physical form or characteristics, and any copy thereof, and

(b) subject to the regulations, any record that is capable of being produced from a machine-readable record under the control of an institution by means of computer hardware and software or any other information storage equipment and technical expertise normally used by the institution (Government of Ontario 2021).

Under MFIPPA a requester can make a request and seek continuing access to the records for a period of up to two years, for records that are produced on an ongoing basis (Trennum n.d.). This creates significant work for employees if those records are not easily accessible or digitized. If the records are filed digitally with electronic document management systems (EDMS) then they are likely very easily retrieved exported from the system to be sent either electronically or in hard copy to the requester.

MFIPPA is relevant to records management in so far as it provides for government transparency, minimizes litigation risks and ensures regulatory compliance. Staff must be able to retrieve relevant records within the statutorily required time frame. When a Freedom of Information (FOI) request is made, it is imperative that both paper and electronic records are organized in a manner that makes for timely retrieval.

Municipal Act

Section 254 of the Municipal Act requires municipalities to retain and preserve the records of the municipality and its local boards in a secure and accessible manner. Section 255 of the Municipal Act permits municipalities and its local boards to destroy records if a retention period for the record has been established under this section and the retention period has expired or the record is a copy of the original record (Ontario, Municipal Act, 2001, S.O. 2001, c. 25 2021).

It is thus imperative that municipalities keep proper records, ones that are accessible and secure as per the Municipal Act. Digitization is an excellent case for the keeping of accessible and secure records due to the nature of electronic document management systems. The municipality can apply rights access, retention periods and file structures that are conducive to the keeping of accessible and secure records.

Planning and Preparing for Digitization

The initial stages of digitization require significant planning. Staff must put a major focus on “planning and initial stages of digitization, sharpening the axe before you cut the tree” (Hutson 2021). The stakeholders must be identified and brought on board to the project. The stakeholders must be made aware of why the project is necessary and what will be achieved by scanning documents. Once stakeholders are on board, feedback from them ought to be collected, and finally a SMART (specific, measurable, achievable, relevant and time-based) plan be identified (Mehdi 2020).

The scope of the project must then be defined. Identify what records will be scanned. Will it be all records of the municipality? Will only the Clerks records be scanned? Will you start with one department and bring all others on board one after the other? As James Hutson, Clerk at Middlesex Centre noted, “you have to strike a balance between what is practical what makes sense to digitize and what you should digitize. How far back are you going to go? Digitizing and fix everything from ancient history is just not realistic” (Hutson 2021).

Once it is determined which records to scan, the volume of records must be determined. For the Township of Blandford-Blenheim, it was decided that, to begin, all the Clerks records would be digitized including Council minutes, agendas, resolutions and by-laws. This meant going back to the 1960s to digitize records and was a significant volume. Next decision to make is whether this is a one-time exercise or an ongoing business practice. In Blandford-Blenheim, it was determined this would be an ongoing business practice as many staff like to access minutes agendas and by-laws, and with digitization of these documents, staff could easily find and read or print the document they were looking for. After all the historical Clerks documents were digitized it was decided that all other departments would begin to digitize their final records.

A further consideration in the planning process is determining whether hard copy documents will be retained or destroyed once digitized. In the case of Blandford-Blenheim, all

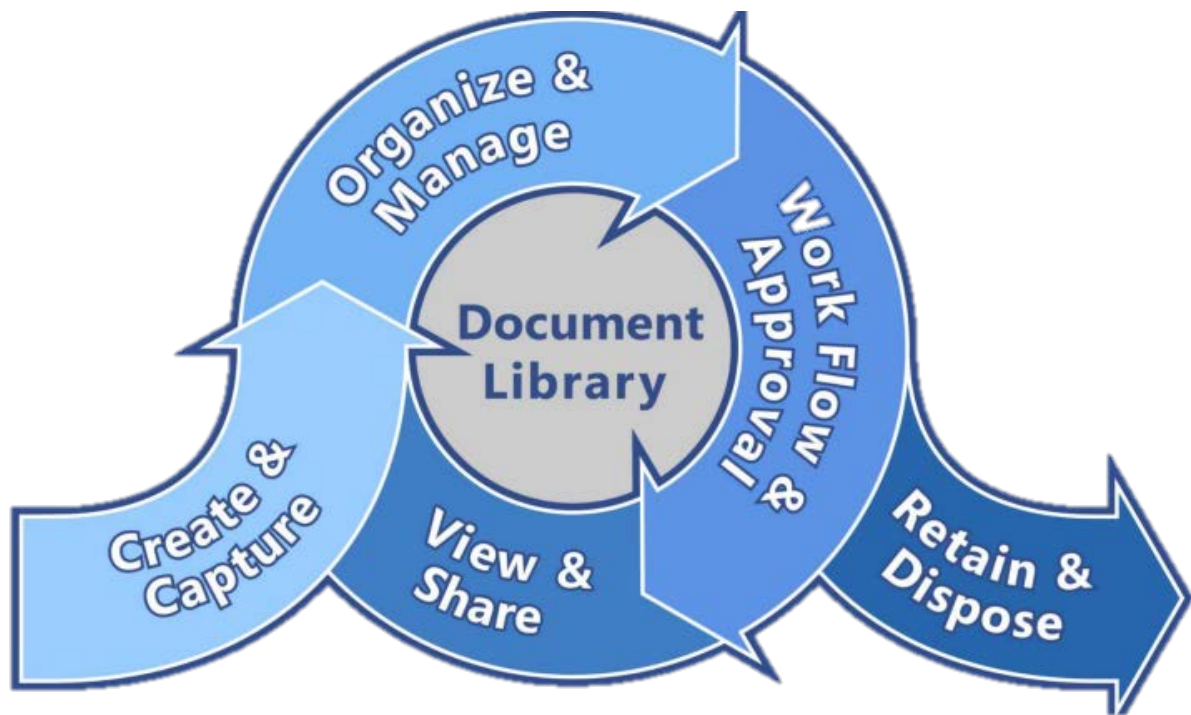
hard copies have been kept due to CAO/Clerk requiring time to buy into the online storage of documents. He requires time to see the system will not crash or fail and that all documents will never be lost. Other municipalities, such as the Township of South-West Oxford, have taken the stance that if they record is permanent on the retention schedule, they will keep the hard copy document as original document and use the digitized item as a version of the document for easy accessibility (Forth 2021).

This brings us to another planning consideration which is coordinating with IT to ensure data is periodically backed up to prevent loss. Backing up data nightly, weekly and monthly is recommended to ensure a loss is not detrimental to the operations of the municipality. Furthermore, when any new software is acquired, it is imperative that IT assists with the implementation of that software. IT can ensure that staff are onboarded and everything is running smoothly.

Another major consideration is the metadata fields that are necessary to identify within each document or set of documents. Metadata is essentially data about data. It is important to know which fields will be automatically filled in by the scanning system such as date and which fields the user will want to manually add such as document title and disposition date.

The final step is to identify whether the scanning will be done in-house or outsourced to a third party or company that specializes in digitization. Some municipalities go to RFP for scanning services, especially if digitization is a one-time exercise. Our municipality made the decision to keep the project in-house due to the ongoing nature of the scanning.

This image summarizes the how the planning process works to create an operational document library. The item will be digitized, metadata applied and filed, go through a workflow, if applicable. Then be retained and viewed by other staff as needed. Disposition of records will happen when the retention period is over.



(Trennum n.d.)

Records Retention By-law

The Records Retention By-law provides for the file structure and the retention on each folder or repository. A records retention and disposition schedule is “a legal authority that describes the records under the control of a government organization, specifies how long and where they must be kept as they progress through the phases of their life cycle, the format in which the records must be stored, and what their final disposition will be (destruction or archival preservation) at the end of their life cycle. (Alberta 2004)”

It is imperative to have your records retention by-law in place before embarking on a digitization project. This will assist in deciding what records to digitize. If the records retention on a document is over a short time period, you will likely not want to digitize those records. If the retention is long, you will likely want to digitize those records. If the retention is permanent, it is important to consider keeping a paper copy of the document. Many municipalities have decided that this is best practice in case the technology goes defunct, or there is a new better technology that supersedes what the municipality is already using. If a paper copy of the permanent record is not kept, there is always the slight possibility of that record being lost.

In a conversation with Else Khoury, a Corporate Trainer with the AMCTO and professional in records management, she brought up the importance of considering obsolescence and transference of software in the future (Khoury 2021). To highlight, currently my organization uses a high quality scanned .pdf document and OCRs it to be stored in Laserfiche EDMS. Metadata is applied and the document is saved in the TOMRMS file structure with

retention period applied to it. A final advantage of having a retention schedule is that, under MFIPPA, retention schedules can provide proof that records no longer exist (Trennum n.d.).

When implementing the retention schedules, it is advantageous to also assign access rights for each staff person to each specific folder or repository at this time. Access rights are user permissions to either view, modify, or delete the document, or all three. Not all staff will have the same access rights. For example, Finance staff will have full access rights to all Administration and Finance and Accounting folders but no access to the Legal Affairs folder and view only access rights to the Development and Planning folder. The Chief Administrative Officer, however, will have access to all folders in TOMRMS and the EDMS. Assigning access rights ensures that documents are kept secure from any error or misjudgement by well-meaning municipal staff.

Software Selection

A significant decision to be made is which software to use for records management. Popular programs include Filehold, Laserfiche and Sharepoint. Software selection should only be considered once an assessment of where the municipality is at in terms of records management is done. ARMA International, a group of records managers and administrators offers a tool to evaluate the current state of your records (Khoury 2021). Once the gaps are identified and it is determined where current compliance with retention and access stands municipalities can make a decision about the best software.

Software selection will depend how the municipality wants to use their digitized records. There are many options for digital records storage. Of municipalities surveyed, 22.5% are using Laserfiche, 15% are using Sharepoint and 47.5% are using another software, this may include Filehold, eFileCabinet, Google Docs/Workspace, Dropbox Business, or TabFusion. The remaining 15% answered not applicable as they haven't digitized yet. Of those 15% who haven't yet digitized records at their municipality, 100% are planning to (SurveyMonkey 2021).

Laserfiche is known for having the ability to do many workflows. A Laserfiche workflow is a business process automation that classifies, organizes, routes and archives documents allowing the user to view the document's business process history and prompting for instructions on next steps. For example, our municipality recently implemented a Laserfiche workflow for accounts payable. An invoice is scanned into the first folder, then it is assigned a template that begins the workflow. Staff begin to fill out the metadata then assign to the appropriate staff for review. When a reviewer is assigned, the workflow sends an email to the staff to open the document in order to review and approve. Then it is assigned to the Director of Finance who also get an email to review and approve. Once this is complete the document is ready to be exported from Laserfiche and imported into our financial software for an accounts payable run to begin. Once it is paid the metadata is then changed and the document gets automatically filed within the Finance and Accounting files. This automation allows for staff to digitally approve invoices and for payment runs to be done completely digitally. When staff want to recall an invoice for whatever reason, they may log into Laserfiche and look in the

appropriate folder or do a search. Searchability or traceability will be touched on later in this report. Another workflow that isn't used by our Township, but that would be immensely helpful is an Agreement Expiration workflow. This workflow has metadata in it that alerts the municipality when an agreement is soon to expire, thus prompting the negotiation of a new agreement. This ensures all agreements are up to date. This is immensely helpful as there are several agreements a municipality holds.

Sharepoint in Microsoft 365 is known for its excellent ability to integrate with other programs and software (Hutson 2021). The Township of Zorra is moving away from Laserfiche after 20 years to Sharepoint for "in place records management" and due to more integration opportunities. This is the ability to manage records on any site. The advantage of this is that records managers have more control over how records are handled (MacLeod 2021). MacLeod noted that staff will be able to access any records anywhere at any time, allowing for better delivery of service and connectivity. He also noted that emails as records is a major issue, and with Sharepoint emails are easily integrated into the EDMS.

Implementation

Implementation requires that, before beginning any substantial work on the project, user orientation sessions are conducted. Users must be informed of the impact of the project on them. No longer will they be able to go to the vault and pull the file they need; they will now need to go into the EDMS and retrieve it electronically. At this time, it is imperative that staff understand the benefit of digitization to them. User buy-in is a major building block in the success of any digitization project.

Finally, it is important to review progress and analyze the results of the digitization project. Are all departments filing their final documents digitally? This was a question posed to interviewees as well as in a survey. The result was that yes, once digitization had commenced and taken hold, most departments have digitized their final records.

Section 2: Challenges

There can be several challenges to digitization of records. Specifically, in speaking with and surveying other municipal professionals, the biggest hurdles to digitization are change management, staff buy in, sheer workload and time constraints.

Change Management

Change management is defined as planning and implementing major change initiatives in the workplace. In AMCTO's Corporate Training a Municipal Survival Guide to Organization Change, it is noted that "change is the only thing that remains constant for us. It is a normal and natural part of our work lives. In fact, the world we live and work in, is a wondrous place of infinite possibilities and opportunities. The more we are able to adapt to change, the more likely it is that we will enjoy and thrive in what we do. The secret is not to avoid change but rather, plan for it, anticipate challenges and enjoy the growth that it is bound to bring" (AMCTO n.d.).

The concept of organizational change is in regard to organization-wide change, as opposed to smaller changes such as adding a new person or modifying a program (Faucher n.d.). There are three types of organizational change; developmental change, transitional change and transformational change. Developmental change is any organizational change that improves and optimizes on previously established processes, strategies and procedures. Transitional change is change that moves and organization away from its current form to a new form in order to solve a problem such as mergers and acquisitions or automation. Transformational change is a change that radically and fundamentally alters the culture, core values and operations (Shaye-Beauchemin n.d.). Digitization of records, if undertaken as an exercise to make most of the municipal final records digital would be defined as a transformational change. This is one of the most difficult changes to implement.

Change management has been identified by most municipal staff that I interviewed as the biggest hurdle to overcome when digitizing records. As Lindsey Mansbridge, Deputy Clerk at Oxford County noted, "people are reluctant because they are used to doing things a certain way" (Mansbrige 2021).

There is typically strong resistance to change. Why is this? Generally, we can chalk it up to five reasons: fear of the unknown, lack of understanding in the need for it, cynicism about change, not seeing the means to accomplish major organizational change, and conflicting goals in the organization (Faucher n.d.). What any manager needs to recognize is that resistance to change is incredibly normal. They must be patient and continue to explain what is needed and why it matters.

In order to overcome the challenge of change management, it is best to tackle change as a team-wide effort. Declare the change vision. Communication about the change, before and during ought to be frequent with all members of the organization. Even though all members must be informed, it is important to have a core team of qualified individuals actually working

on the change. It is also important to implement change at a decent pace, make it methodical and strategic in order for it to be successful. Municipalities without a clear vision and timeline “will spend too much time fielding stakeholder inquiries instead of tending to the necessary changes” (Clayton 2021). Finally, in order to overcome the challenge of change management it is ideal to embrace a test and learn approach. According to Clayton, change managers will need to:

- Establish ongoing listening mechanisms that allow them to keep a pulse on employee and stakeholder sentiment.
- Welcome changing requirements, even late in the process, and modify change initiatives, or even the change vision itself, to ensure the work continues to be relevant and will deliver value.
- Lean more into the art of change management than the science, making determinations in the moment about which steps and tools are needed and which aren’t likely to add value that surpasses the lost value of delays.
- Adopt agile practices, such as daily stand-ups, that enable continuous coordination and evaluation of new variables as they surface.
- Use “fast-turn” and informal communications channels to update employees on strategy and what is needed from them.
- Leverage “sprints” that result in minimally viable change management resources that can be tested and evolved for continued relevance (Clayton 2021).

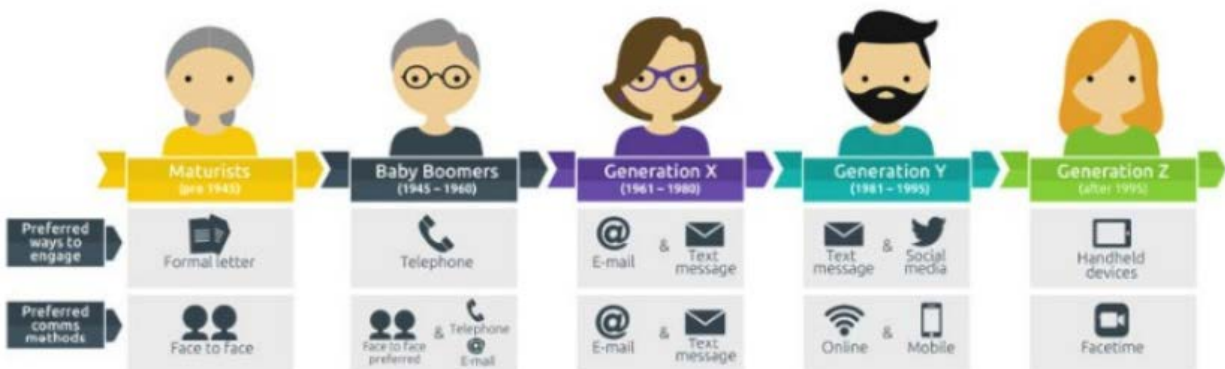
According to Clayton, a pandemic is no better time than to implement change as crisis management may be a challenge forward. This is true of many municipalities during the COVID-19 Pandemic. In 2020, many municipal administration staff were forced to work from home, highlighting the need to have access to a shared server and digital documents. Of many municipalities surveyed, most were thankful for the digitization work they had done, or ramped up their digitization and records management once back in office due to the possibility of being home again and needing access to files (SurveyMonkey 2021).

Culture and Staff Buy In

In any conversation about change management, culture must be discussed. “The concept of culture is particularly important when attempting to manage organization-wide change”. When organizational change fails, it is generally credited to lack of understanding of the immense role that culture plays in organizations (Faucher n.d.). Moving from a paper-based work culture to a digital one is a big and frightening change for some municipal staff. If there is already a good culture and strong leadership, change management is easier to achieve because there will be better staff buy-in. Staff buy-in is imperative to achieve and maintain.

A multigenerational workforce presents its own challenges for staff buy-in to change. Differences in work style, different values, and varying communication styles can all be challenges to staff buy-in (Shaye-Beauchemin n.d.). It is important to recognize these possible

generational differences and be flexible, provide opportunities to learn and to tailor your communication to the audience. The below graphic highlights the generational differences municipalities may encounter when implementing change such as digitization of records.



(Shaye-Beauchemin n.d.)

In an interview with an upper tier Records Management Coordinator, Lindsey Mansbridge with Oxford County, she noted that the best thing to come out of the pandemic was a willingness for staff to change. Due to so many people working from home, staff began to realize the benefit to having all their files at their fingertips. Prior to that, staff only saw records management and digitization of records as “filler work” (Mansbridge 2021).

Staff buy in can also come from the need to access a lot of records in short amount of time. Mansbridge noted that staff who have experienced an FOI request through MFIPPA were more apt to have bought into the digitization of records due to the need for them to access many records on a specific topic and/or timeline (Mansbridge 2021).

Sheer Workload and Time Constraints

The workload and time required to digitize records is a major hurdle in project planning and implementation. This is why it is important to have dedicated records management staff. In smaller municipalities, however, a dedicated records management coordinator position may not exist. This is true of my municipality. What the Township of Blandford-Blenheim has done to tackle the issue of sheer workload is hire a summer student every year whose main job it was to digitize records. Staff would ensure the student was thoroughly trained and informed to ask questions if they didn't know how to file something.

In a conversation with Records Management Specialist, Else Khoury, she noted that sheer workload is always an issue because many municipalities just don't have the resources for records management (Khoury 2021). She noted that the work is often assigned to a summer student and doesn't go well because that student is not properly trained or doesn't have the right experience. From personal experience, this was true for one year of our summer students. In this case, the student employed scanned several years worth of documents in sideways. This resulted in the OCR not working and decreased searchability of the documents for those years

unfortunately. The recommendation from Khoury was to always hire out the work if the municipality lacks the resources (Khoury 2021).

Even though there are several challenges to digitization of records, it is abundantly clear that these challenges are not insurmountable and the triumphs outweigh the challenges.

Section 3: Triumphs

Centralization

Centralization of documents is a major triumph to the digitization of records. Using EDMS means that staff can access all digitized records from their work station instead of having to search through multiple vaults, filing cabinets and possibly even office locations. In 2020 we saw government-issued lockdowns and many municipalities sent their staff home to do their work from there. If these municipalities didn't have documents digitized and accessible in EDMS then they suffered greatly. If, for example, an FOI request came in during the lockdown, staff would have to search hardcopy records in cases where documents are not digitized. This adds significant time to the search.

In place records management takes this even a step further. When data is stored in the cloud such as with Microsoft365 it is accessible to the end user at any time in any location as long as they have data or a WIFI connection. This is incredibly useful as the pandemic has shown us that staff need to have flexibility in order to work.

Traceability

According to a 2011 statistic out of the USA is that the average office staff spends about 5% of their time reading information and 50% of their time searching for that information. Furthermore, searches have only 50% success rate (Kennedy 2018). So much of staff time is wasted on document recall. This is evident across departments and is rampant in every municipality that doesn't use EDMS. Often, the shared server of a municipality is not organized in any specific way due to many factors. Documents are named something that is not apparent to the searcher, thus the searcher cannot locate with a simple look up. Documents are filed in different locations on the share server based on the user's thought process. Each department may have its own file structure, or each user may have their own version of file structure. One CAO, during an interview, referred to their shared server as a "dog's breakfast" (MacLeod 2021). It is thus clear that if no electronic document management system is used, recall and traceability of documents can be expectedly difficult.

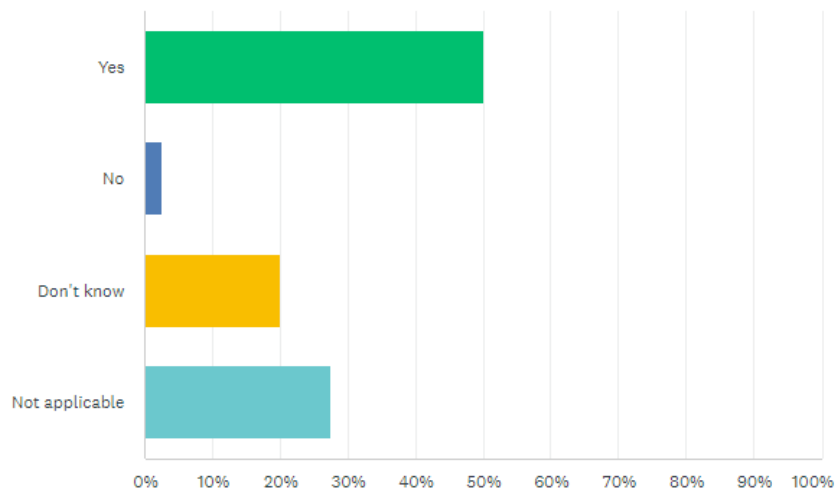
EDMS have the benefit of significantly improving document traceability. To take Laserfiche as the digital record management system example, the document has OCR thus each word is searchable. This massively improves document traceability. In Laserfiche in particular, you may also include metadata which allows for better document traceability. Metadata is defined as "data about data" (Blog n.d.). There is also the document relationship feature that allows related documents to be accessed directly from within a particular document's metadata tab (Blog n.d.). For instance, by-laws that are current and those that have been repealed can be linked together. This reduces even having to search the metadata for a by-law related to the one an individual is looking up.

When it comes to municipal managers and staff that are in charge of records management, of 40 individuals in municipal government surveyed, 20 said that digitization of

records has improved traceability. If you consider that 11 responders of 40 said that traceability was not applicable because they have not yet digitized, 69% of responders said that digitization has improved traceability. It is thus clear that digitization of records significantly improves document traceability allowing for staff to quickly retrieve documents and free up time for other responsibilities.

If you have digitized, has digitization of your records improved document traceability?

Answered: 40 Skipped: 0



ANSWER CHOICES	RESPONSES
Yes	50.00% 20
No	2.50% 1
Don't know	20.00% 8
Not applicable	27.50% 11
TOTAL	40

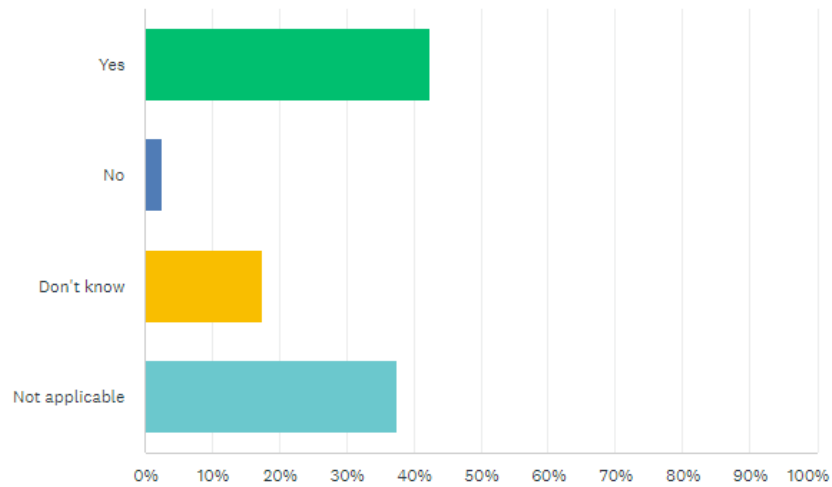
(SurveyMonkey 2021)

Collaboration

Collaboration between departments is a major triumph of digitization of records. No longer are staff reaching out to the records management coordinator for a copy of a resolution or a by-law. Staff are now able to access those documents in the EDMS. From personal experience, this is the most significant benefit to having digitization of records. Managers are no longer coming to me for documents because they can access them easily and quickly from their own work station. Of municipal staff surveyed, 68% of respondents noted that digitization of records has resulted in better collaboration between departments.

If you have digitized, do you find collaboration between departments better?

Answered: 40 Skipped: 0



ANSWER CHOICES	RESPONSES
Yes	42.50% 17
No	2.50% 1
Don't know	17.50% 7
Not applicable	37.50% 15
TOTAL	40

(SurveyMonkey 2021)

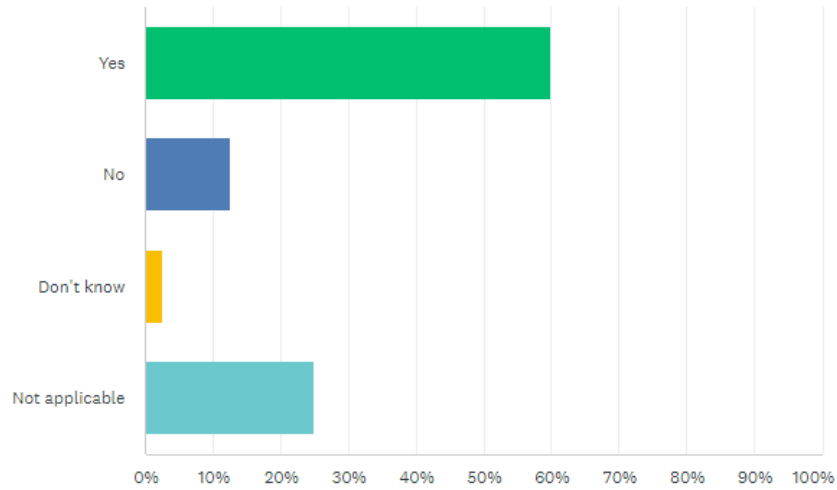
Anecdotally, with Development and Planning Files that are shared between the lower and upper tier at the Township of Blandford-Blenheim, EDMS has significantly improved collaboration between departments. The Drainage, Building, Planning and Clerks staff all have access to the records for their purposes. Not all staff have modification rights, some are only viewing rights, however, this is all that is needed for their purposes.

Sustainable Growth

Many municipalities are growing in many ways. Municipal responsibility year over year is increasing with provincial downloading of responsibilities. This means more staff and more work translating to the requirement for more desks and office space as well as storage space for records management. Of municipal staff surveyed, 80% of respondents answered that one of the motivating factors for digitization of records was to free up physical space. As you can see this is a major win for digitization of records.

If you have digitized, was one of the motivating factors to free up physical space?

Answered: 40 Skipped: 0



ANSWER CHOICES	RESPONSES
Yes	60.00% 24
No	12.50% 5
Don't know	2.50% 1
Not applicable	25.00% 10
TOTAL	40

(SurveyMonkey 2021)

Conclusion

In conclusion, there are several reasons for a municipality to digitize their records as seen above. Many municipalities are already on the path to digitizing the bulk of their records as they have determined that the sheer workload and other challenges are worth the triumphs that digitization presents. Change management is never easy, as we have seen, however, it is worth the planning and implementation to ensure that records are searchable and centralized. Collaboration is proven to improve, and it is the most sustainable growth option as years and years of records begin to compile. As seen above, it is important to lay down proper planning before embarking on a digitization process. There are several considerations, for example, what software will work best for your municipality. For the Township of Blandford-Blenheim digitization has been a major undertaking, but has increased efficiency and allowed staff to work seamlessly from home during a pandemic which has seen several lockdowns. The advantages are clear, digitization is well worth the time and effort.

References

- Alberta, Government of. 2004. "Records and Information Management Branch - Service Alberta." *Developing Records Retention and Disposition Schedules*. 07. Accessed 12 08, 2021. <https://www.alberta.ca/assets/documents/IM-Developing-Schedules.pdf>.
- AMCTO. n.d. "AMCTO Education Events." *AMCTO Corporate Training*. Accessed 12 14, 2021. <https://www.amcto.com/Education-Events/Corporate-Training/Managing-Organizational-Performance/Municipal-Survival-Guide-to-Organizational-Change>.
- Blog, Laserfiche. n.d. *3 Ways Metadata Makes Finding Documents Easy*. Accessed 12 07, 2021. <https://www.laserfiche.com/ecmblog/3-ways-metadata-makes-finding-documents-easy/>.
- Clayton, Sarah Jensen. 2021. "Change Management." *An Agile Approach to Change Management*. 01 11. Accessed 12 16, 2012. <https://hbr.org/2021/01/an-agile-approach-to-change-management>.
- Faucher, Kane. n.d. "AMCTO ." *EDMM Pre-Reading: Organizational Behaviour, Strategic Management*. Accessed 12 14, 2021. <https://www.amcto.com/getattachment/Education-Events/Diplomas/Executive-Diploma-in-Municipal-Management/EDMM-Program-Materials/1-Kane-Faucher-Print-Ready-Pre-Reading-Package-Organizational-Behaviour,-Strategic-Management.pdf.aspx?lang=en-CA>.
- Forth, Julie, interview by Sarah Matheson. 2021. *Virtual Chat: Digitization of Records* (12 06).
- Government of Ontario. 2021. *Municipal Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c. M.56*. 04 21. Accessed 12 07, 2021. <https://www.ontario.ca/laws/statute/90m56>.
- Hutson, James, interview by Sarah Matheson. 2021. *Virtual Chat: Digitization of Records* (12 06).
- Kennedy, Anne Hepplewhite & Helen. 2018. "AMCTO." *2018 Annual Conference*. <https://www.amcto.com/getattachment/Education-Events/Annual-Conference/2018-Annual-Conference/Conference-Program-and-Schedule/1A-Records-Management.pdf.aspx?lang=en-CA>.
- Khoury, Else, interview by Sarah Matheson. 2021. *Digitization of Records Chat* (12 17).
- MacLeod, Don, interview by Sarah Matheson. 2021. *Virtual Chat: Digitization of Records* (12 9).
- Mansbrige, Lindsey, interview by Sarah Matheson. 2021. *Virtual Chat: Digitization of Records* (12 14).

Mehdi, Moez. 2020. "AMCTO." *2021 Spring Zoom Cohort: Executive Diploma in Municipal Management* . Accessed 12 08, 2020. [https://www.amcto.com/getdoc/0dd479d3-bf7f-47d6-92aa-5c45f5cf2208/EDMM-Program-Materials-\(2\).aspx](https://www.amcto.com/getdoc/0dd479d3-bf7f-47d6-92aa-5c45f5cf2208/EDMM-Program-Materials-(2).aspx).

Ontario, Government of. 2021. "Municipal Act, 2001, S.O. 2001, c. 25." *Ontario.ca*. 11 01. Accessed 12 07, 2021. <https://www.ontario.ca/laws/statute/01m25#BK316>.

Ontario, Government of. n.d. *Municipal Freedom of Information and Protection of Privacy Act R.S.O. 1990, CHAPTER M.56*.

Shaye-Beauchemin, Melanie. n.d. "Executive Diploma in Municipal Management." *Succession Planning and Change Management*. Accessed 12 17, 2021. [https://www.amcto.com/getattachment/Education-Events/Diplomas/Executive-Diploma-in-Municipal-Management/EDMM-Program-Materials-\(2\)/4-Melanie-Shaye-Beauchemin%E2%80%93PDF-Presentation-Succession-Planning-and-Personnel-Change-Management-\(1\).pdf.aspx?lang=en](https://www.amcto.com/getattachment/Education-Events/Diplomas/Executive-Diploma-in-Municipal-Management/EDMM-Program-Materials-(2)/4-Melanie-Shaye-Beauchemin%E2%80%93PDF-Presentation-Succession-Planning-and-Personnel-Change-Management-(1).pdf.aspx?lang=en).

SurveyMonkey. 2021. *Digitization of Records: the Municipal Experience*. 12.

Trennum, Matthew. n.d. "AMCTO." *Municipal Freedom of Information and Protection of Privacy Act (MFIPPA) - Learning the Ropes*. Accessed 12 07, 2021. <https://www.amcto.com/getattachment/5f916607-3d53-4584-866f-eee6ba3f18c4/.aspx>.