

# In-Form Consult supports charity with corporate information management health check

*"In-Form's work has been of tremendous importance to the Trust as we plan our key activities to improve information governance over the next few years."*

**Gill Eastwood, Canal & River Trust**

## About the Canal & River Trust

The Canal & River Trust (the Trust) is a charity which protects over 2,000 miles of waterways in England and Wales. On top of maintaining these many miles of canals and rivers, which are often more than 200 years old, the Trust are responsible for an enormous network of bridges, embankments, towpaths, aqueducts, docks and reservoirs and more.

As a charity, the Trust rely on their supporters and a passionate team of staff and volunteers. The Trust works with the communities who live and work around the waterways to create better, more open spaces, breathing new life into canals and rivers.

From improving towpaths for cyclists and creating new wildlife habitats, to maintaining the distinctive infrastructure, the charity constantly strives to make canals and rivers the very best they can be.

The Canal & River Trust believe the waterway network is a national treasure which makes people's lives better. They are here to ensure that it is protected forever.

## Business Challenge

The Canal and River Trust were assessing the activities needed to increase information management (IM) efficiency and to achieve compliance with the GDPR (General Data Protection Regulation). A strategic programme had been initiated, focussed on transforming information practices and the upgrade of the Gateway SharePoint solution.

The desired characteristics of an improved information environment had been identified including:

- Knowing what information the Trust has, where it is stored and who is responsible for it
- The ability to locate information in a timely manner
- Compliance with data protection legislation
- Information governance controls, particularly for information storage and disposal

In-Form Consult (IFC) were asked to conduct a Corporate Information Management Health Check that would validate the current state and inform the development of a roadmap of activities aligned to the business strategy and available resources. IFC were also asked to provide guidance on the key considerations for planning a SharePoint upgrade from version 2010 to 2016.

## IFC Approach

IFC's CIM Health Check assessed the Trust's information environment against industry best practice such as ISO standards (ISO 15489 for document and records management), and our experience supporting successful information transformation programmes.

Our discovery approach consisted of three components:

1. On site stakeholder interviews and workshops
2. e-Audit of network drive usage
3. Documentation research

Information practices, systems, culture and the supporting governance framework were discussed, for electronic and physical records. The Health Check sought to answer questions such as:

- What is the information vision?
- What is the information culture and awareness of the importance of effective information management?
- Are the appropriate strategies, policies and procedures in place?
- What information governance roles and responsibilities are present?
- What repositories, tools and technology are being used? Are they fit for purpose?
- How will the Trust progress in a cost-effective manner, without impacting business as usual operations?

IFC analysed the current state findings to identify the main issues and risks, and delivered prioritised recommendations to assist the Trust develop a roadmap of actions. IFC included effort estimates for each activity along with guidance on whether the task could be completed by the Trust, their IT service partner or whether IFC support was recommended.

## Results

The Trust now has a detailed roadmap that supports a three-year strategic information programme that is sustainable and achievable through Trust resources and external support. The roadmap will deliver benefits including:

- Increased employee and organisational productivity
- Cost savings through information disposal
- Reduced data protection legislation compliance risk
- Enhanced supporter and customer experience



Canal & River Trust

*"The consultants quickly understood our rather complex organisation and produced a meaningful report."*

**Gill Eastwood, Head of Governance Audit & Risk**

## In-Form Consult helps charity transition into brave new world of EDRM in SharePoint

### Why IFC?

IFC is a specialist independent information management consultancy with more than 30 years of experience of helping businesses transform enterprise information into a powerful corporate asset. Our solutions, which encompass consultancy, technology, training and resourcing services, help to solve complete information management needs. IFC is currently supporting many public and private organisations to improve their information management practices. IFC consultants are industry leading experts in the field of information and records management.

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

IFC's solutions, which encompass consultancy, technology, training and resourcing services, support your complete information management needs.

*"What has been particularly helpful is that not only have they helped us understand "what" we needed to do, they have been able to advise us in very practical terms on "how" to go about it."*

**Gill Eastwood, Canal & River Trust**



**Canal &  
River Trust**

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### 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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