

Retention and Transfer Toolkit

Case study: Roman Catholic Archdiocese of Southwark, April 2019

Jenny Delves – Archivist, Alison Forsey – Records Management Assistant

Background

The Roman Catholic Archdiocese of Southwark (RCAOS) has had an archive since at least the early 1900s. This was run by a priest, often with a particular interest in history, who looked after the archives in addition to his parish duties. In 2014, RCAOS hired their first professional archivist, Jenny Delves. The archivist saw a need for permanent resource in records management, particularly the finance area, and in 2018 Alison Forsey was hired as the Records Management Assistant. The two are the only information professionals in the organisation, and despite being based in separate buildings they have worked hard to “match and coordinate in every way possible” to present a united image.

Challenges

- RCAOS is currently in a period of change, and there has been a move to try and become more accountable as an organisation, so there is a degree of professionalising a lot of the roles that may have previously been done by clergy or volunteers.
- Along with the pressures of GDPR, this helped to promote the need for a qualified Records Manager.
- Records management has not previously been a priority, and there has not been a unified, cohesive approach to records and archives across the organisation.
- RCAOS is a large and varied organisation, involving numerous different agencies and covering a number of different geographical sites.
- Different areas and teams have different approaches to records and archives management, and Jenny and Alison are based in completely separate teams, sometimes with different techniques and priorities.

Approach

Since starting work in 2018, Alison has been promoting compliance and good recordkeeping in the wider organisation, and believes that by collaborating with the Archives department she can have a greater influence on the current culture, especially as more people are aware of the usefulness of the archive. Some departments have familiarity with Canon Law, which dictates the keeping and maintaining of certain types of records, and Jenny and Alison hope to build on and promote this kind of attitude towards all records. Both Jenny and Alison understand the importance of current records management for successful archiving in the future, and hope to instil this in the rest of RCAOS.

- When Alison first started, a lot of effort was put into learning the branches of the organisation, and she has now created a handbook of guidance for any future new joiners.
- To overcome any initial challenges, Jenny and Alison made sure they focused strongly on communication – they have scheduled weekly meetings, and both keep the other up to date with their activities.
- Because of this, they are able to pool their resources and knowledge, and assist each other with any issues or questions they might have. They often consult each other in decision making, and share advice and successes.

Effective communication and collaboration has helped these two departments overcome the geographical and structural divisions and helped them both promote themselves within the wider organisation.

Key learnings

- Communication is the key to successful collaboration
- Importance of “soft skills” – networking, advocating, and promoting archives and records management essential to getting other departments on board
- Need to ensure you give people a reason to change their ways of working – they need to understand the benefits of good recordkeeping
- “Just because it makes perfect sense doesn’t mean people are going to do it” – engage with each department to understand their particular challenges around records management
- By working together and becoming even more integrated, records and archives can support each other to develop more of these skills and continue to build stronger relationships across the organisation

In the short time they have been working together, Jenny and Alison have worked hard to communicate, collaborate, and promote their departments within RCAOS. It may be a slow road, but they believe ‘sometimes the victories are quite small, but they’re still exciting and worth celebrating!’