

Records Management: The Canadian Contribution/Contribution canadienne à la gestion des documents. Compiled by BETTY D. SHELDON-MacFARLANE, PATRICIA A. MILLS, BRIAN OWENS, and MARTHE VEILLET. London, Ontario: Department of Secretarial and Administrative Studies Social Science Centre, University of Western Ontario 1984. 157 p. ISBN 0-7714-0652-5 \$12.00.

The ARMA/ICRM Bibliography on Information Management. MICHAEL V. LEWELLYN. Prairie Village, Kansas: Association of Records Managers and Administrators, 1981. v, 53 p. \$14.00.

As professions evolve and mature, they generate a substantial corpus of professional literature explaining and examining past practices and techniques in the light of present day experiences. This is true of all professional bodies and can be witnessed in the publication activities of such diverse professions as engineering, law, medicine, and architecture to name but a few. Within this context, records management is no different, as evidenced in recent years by the flood of publications addressing problems unique to this area. Records management professionals have been blessed by an abundance of literature on filing practices, indexation principles, management techniques, and a panoply of related topics over which a series of bibliographic guides have attempted to establish subject control.

The ARMA/ICRM Bibliography on Information Management and *Records Management: The Canadian Contribution/Contribution canadienne à la gestion des documents* are two recent additions to this subject literature with a difference. Unlike other bibliographic contributions, which have been aimed primarily at consolidating and facilitating access to existing literature in the field, these works are for specific audiences. While Lewellyn has assembled a working bibliography for records managers desirous of upgrading their professional credentials through successful completion of the Certified Records Management (CRM) examination, Sheldon-MacFarlane and her colleagues have prepared a records management bibliography with a Canadian focus.

Professional records managers contemplating taking the CRM, would be well-advised to consult Lewellyn's bibliography before undertaking this important career development step. Compiled with the CRM candidate in mind, the author has included over 150 records management titles classified according to the copyrighted outline of the Institute of Certified Records Managers. In addition, accompanying each of these entries, he has provided brief annotations as a reading guide affording candidates the luxury of skipping familiar subject territory while focusing on their *terra incognita*.

The publication is divided into nine sections covering the general to the specific. Included are such sections as records generation and control, technology, management principles and programme organization, as well as records protection and disposition. To facilitate subject access, major subject headings are further broken down within sections and in turn sub-divided into their component parts. For example, the technology section is sub-grouped into three broad headings: micrographics, data processing, and word processing which are further sub-divided into subject areas under such criteria as definition, function, equipment, and applications. This clever organization quickly permits the reader to locate relevant subject areas and skim these sub-divisions to uncover desired literature. Archivists will of course delight in this straightforward approach which permits them to discern those references applicable to their work. Many monographs and articles listed within designated sections are duplicated by alternate choices, permitting the reader

flexibility when a first choice is not available. This thoughtful inclusion is readily evident in the section on records protection and preservation where the author has included the titles of no less than eight publications covering the subject of records scheduling and retention.

As Lewellyn willingly confesses, "the bibliography reflects the tension within the records management profession" between manual and automated records systems; however, by outlining the parameters of his bibliography at the outset he has to some extent short-circuited accusations of favouritism which might have otherwise been hurled by either faction. In the interests of practicality, the author has attempted to be selective rather than comprehensive when compiling his work and hence established criteria for inclusion. Simply put, these include the author's credibility, publication timeliness, and availability. But beyond this, Lewellyn has refused to include literature of which he possessed but a second-hand knowledge. In so doing, he has spared both harried records managers and archivists the task of ploughing through voluminous readings and escaped potential criticism from both sides in the information/records management specialities.

Nevertheless, while Lewellyn has gingerly side-stepped these tensions in the profession, his work is subject to more serious criticism. Unfortunately, the text is marred by grievous spelling, grammatical, and organizational errors which significantly detract from its overall effectiveness. This we can only attribute to poor proofreading and sloppiness in the volume's final preparatory stages. The bibliography also bears considerable evidence of being hastily assembled. In one instance, even page numbers have been reversed. Such negligence is unacceptable in a published work and seriously undermines the quality of this otherwise fine bibliographical tool.

Those interested in surveying the available records management literature applicable to the Canadian situation will both welcome and applaud the publication of *Records Management: The Canadian Contribution/Contribution canadienne à la gestion des documents*. Compiled at the behest of Claire Lee, then President of the Ottawa ARMA Chapter, this bibliography assembles for the first time, in a highly useful format, existing Canadian records management publications. In preparing this bibliography, the compilers diligently scoured institutional library catalogues, indexing and abstracting services, existing bibliographies, and numerous related journals in the field. The result is well researched, skilfully organized, and authoritative.

Divided into two parts, each contained on different mediums, this publication not only attempts to capture available published and unpublished sources on the topic, but also to facilitate access to these sources through a series of subject, author, and keyword indices. Whereas Part One consists of a paper document containing a selective listing of entries judged by "the editors and researchers to be of greatest significance to most practitioners and students," Part Two includes two sets of microfiche. Of these, one set serves as an index to many additional records management citations (including those originally listed in Part One), while the other comprises copies of previously unpublished and otherwise fugitive copies of unedited presentations supplied by ARMA members.

Once again, this bibliography ranges from the general to the specific, including such broad subject headings as correspondence management, forms management, storage media, micrographics, and indexing rules. Unlike Lewellyn's bibliography, however, entries here are not further sub-divided within sections but instead alphabetically organized by name. Complementing this arrangement furthermore are brief bilingual

annotations which, in consort with the publication addresses supplied for each entry, supply readers with vital information concerning the listed items.

Archivists perusing this publication will likely be unimpressed by the single reference bibliography citation in a section supposedly devoted to archives. Yet despite this initial disappointment, the bibliography still has much to offer archivists who must face records management issues as part of their work. Especially relevant are sections on records retention/disposition, legislation and guidelines, security, and records centres — all vital issues to the proper establishment and management of viable archival programmes. Also of considerable interest, are sections on legality of records and privacy/access to information which are already an ongoing concern for many government archivists. Nonetheless, while archivists will likely be pleased to see the inclusion of such sections in the text, they may at the same time express surprise at the omission of certain key publications within these designated sections. In the privacy/access section for example, recent seminal publications by such authors as Robert J. Hayward, David Flaherty, and J.V. Knoppers go unmentioned while less important or superseded counterparts merit inclusion. This perhaps reflects the compilers' over-reliance on bibliographical and abstracting services when preparing this publication and provides persuasive evidence that a mastery of such tools alone can never totally substitute for thorough professional knowledge.

The editors also might have included a more detailed explanation of their criteria for subject inclusion. Why, for instance, is a health records section included while equally important areas such as legal or university records are excluded? No explanation is forthcoming in the bibliography's introduction. Finally, some consideration should have been afforded to inclusion of a paper format index to supplement the existing microfiche versions. This would have proved both a worthwhile and simple addition and would have significantly improved the volume's accessibility on occasions when consulting microfiche proves difficult or cumbersome.

These bibliographies are welcome additions to a body of knowledge closely allied to archives. Although the publications' limitations may prod certain archivists to seek additional subject literature in the field, for most, these publications should provide a more than adequate records management reference source for the immediate future.

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Strategic Planning for Records Management and Archives. CARL NEWTON. Winchester, England: Society of Archivists, Records Management Group, Occasional Paper 4, 1984. 47 p. ISBN 0 902886 16 9.

Effective management of any enterprise depends to a great extent on adequate planning. Strategic planning situates the activities in their broad context, determines the priorities that are to govern future decisions, and provides a framework for development of realistic goals and action plans. Obviously, its techniques are applicable to the related fields of records management and archives. However, one wonders how many archivists or records managers have ever thought about strategic planning, let alone implemented it.

Since 1977, the Records Management Group of the Society of Archivists in Britain has been publishing useful reports and guides. This publication is the fourth in the group's