

# Information Management Services

The effective management of information is the foundation of any business



**VOTAR PARTNERS**  
BUSINESS CONSULTING SERVICES

# Information Management

We believe the management of information is the foundation of any organisation.

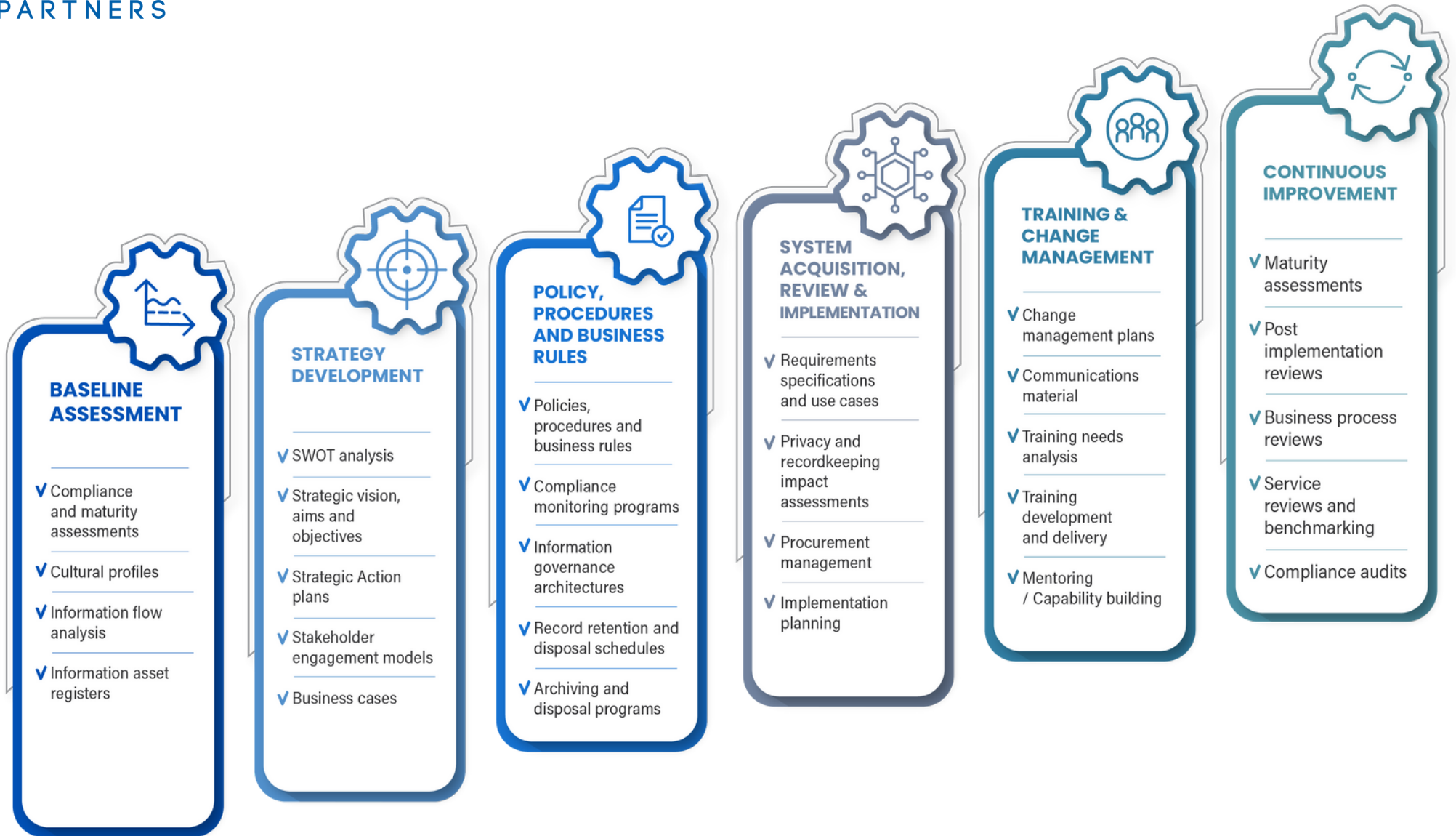
We are in the midst of a digital revolution which has transformed how we communicate and how we use information. The effective management of organisational information is essential to supporting this and as organisations progressively transition to the digital model of service delivery, the role of Records, Information and Knowledge is more relevant and critical than ever before.

Through our experience, we know effective and efficient management of information assets underpins all functions and activities and will contribute to delivery of your services, mission and strategic goals. Without good information management, organisations cannot operate effectively and cannot meet its regulatory obligations.

There are many factors to ensure the effective management of information. These can include:

- ✓ **Governance** – Legislation, Policy Framework, Strategy, Audit
- ✓ **Legislative Domains** – Recordkeeping, Privacy and Information Security
- ✓ **Information Lifecycle** – Creating, Capturing, Controlling, Storing, Accessing and Disposing of information
- ✓ **Enablers** – People, Culture, Process and Technology





Whilst we have a mature approach it is important to note that you have full flexibility to select the services you need. We're here to support you on your journey based on your internal capacity, capabilities and information management maturity.

# The Votar Offer

In summary we offer organisations the following:

- ✓ Our experience delivering a wide range of Information Management (IM) strategic and operational improvement services to regulated entities including local, state and federal government, utilities, health, education and organisations in the not-for-profit and private sectors.
- ✓ Our deep knowledge and experience of the Australian regulatory environment including state and federal government regulators in records management, information security and privacy.
- ✓ The skills of our consultants who actively listen to draw out critical information, understand business pains and strategic direction. This disciplined activity of probing and uncovering relevant information supports the quality of the project deliverables and ensures initiatives are realistic and achievable.
- ✓ Support you to develop and prioritise practical initiatives across each stage of the information management lifecycle, ensuring that your practices support and enable business improvements, and remain relevant to contemporary scenarios.
- ✓ Staunchly vendor independent consulting services ensures we have no conflict of interest and that we will provide organisations with impartial, evidence-based guidance through depth and rigour of our consultation and analysis.
- ✓ Our Regulatory Compliance Assessment Toolkit (RCAT) can be used to identify recordkeeping, privacy and information security compliance gaps and risks.
- ✓ We deliver advice and guidance that is practical and achievable based on the needs, capacity, capability and budget of the organisation.



We are committed to deliver a quality service as evidenced through our references and accreditation (ISO 9001).

We are focused on achieving the best outcomes for our clients, their workforce and service users.

## VOTAR EXPERIENCE

# Votar Information Management Experience

A distinctive feature of Votar Partners is our aim to quietly empower our clients and, rather than steal the limelight, act in a support role to help our clients achieve their own success.

This is one of the many reasons we don't advertise projects. However to provide you with the assurance we have the necessary knowledge and experience we are pleased to provide the following examples of projects delivered to State and Local Government organisations.

### Strategic Projects

- ✓ Knowledge Management Framework/Strategy
- ✓ Information Management Framework/Strategy
- ✓ Regulatory Compliance and Maturity Assessments
  - Recordkeeping
  - Information Privacy
  - Information Security
- ✓ Information Management Culture Profiles
- ✓ Information Management Architecture Development
  - Business Taxonomy/Classification Scheme
  - Security Access Model
  - Record Retention & Disposal Schedules
  - Metadata Schema
  - Business Rules & Document Naming Conventions

### Operational Projects

- ✓ Records and Information Management Team Reviews – looking at structure, staff roles and responsibilities, capacity and the efficiency and effectiveness of the
- ✓ Business Cases focusing on extending the programs to look beyond just digitisation but on understanding the broader business benefits – including classification of data to improve search, Open Data etc
- ✓ Information Audit – Conduct an audit of information assets in hardcopy and digital formats to understand information needs, flows, volumes and repositories
- ✓ Digital Signature Policy
- ✓ Information flows analysis, process mapping and improvements and data integration initiatives
- ✓ Mail digitisation – Review of incoming mail processes, specification and procurement of appropriate solution/vendor with a focus to improve the efficiency of the mail distribution process
- ✓ EDRMS Specifications
- ✓ Systems Health Check – An objective assessment of the system's functionality, integrity and usability
- ✓ Business Systems Regulatory Compliance Assessment
- ✓ Privacy Impact Assessments
- ✓ Archival Management Audits

## VOTAR EXPERIENCE

# Information Security Projects

To date we have supported more than 50 organisations respond to and uplift their maturity in relation to compliance with their relevant information security standards.

This includes the Victorian Protective Data Standards Framework in Victoria, NSW Cyber Security policy, NIST Cyber Security Framework and Essential 8 Maturity Model.



Some recent and relevant projects that show we understand customer needs include:

- ✓ Training on the Victorian Protective Data Security Framework (VPDSF)
- ✓ Delivered Compliance Maturity Assessments – providing a baseline of current maturity in protective data security
- ✓ Completed Security Risk Profile Assessments (SRPA) – Identifying security risks, ratings and controls (current and proposed)
- ✓ Completed Protective Data Security Plans (PDSP) – to report planned security improvements and prepared a prioritised and action plans
- ✓ Developed Information Security Incident Response Plans and registers
- ✓ Provided scenario-based training for response teams
- ✓ Developed Information Asset Registers and value information assets using Business Impact Level (BIL) tables
- ✓ Develop an Information Security Incident Response Plan and register, and provide scenario-based training for the response team
- ✓ Develop System Security Plans for business systems containing high-value information assets
- ✓ Developed policies and procedures including Security Management Frameworks, Privacy, Digital Signatures, Identity & Access Management, Protective Disclosure & Surveillance Technologies (CCTV & Drones)

## VOTAR EXPERIENCE

# Votar M365 Adoption Experience

M365 Adoption is a hot topic and its causing lots of confusion across ICT, information, data, security and records professionals. This confusion is not helped by the endless publications from different professionals on how "Microsoft Manages Records/information". The following represents an example of our recent projects.

In our experience there are many Microsoft providers who may understand M365 technology but don't have the underling information management knowledge to support successful delivery of projects for highly regulated organisations.

### VIC STATE GOVERNMENT CLIENT Native M365 environment audit

Votar were engaged by Head of Risk and Compliance to do a full audit of the current environment including the adoption of M365 and provide recommendations for improvements whilst considering their historic investment in the EDRMS. This considered IM architecture and compliance - what does the broader architecture look like, can M365 native configuration suffice or are add ins required? All recommendations and the program of initiatives were fully endorsed.

### NSW GOVERNMENT CLIENT Considered rolling out MS Teams and have a mature EDRMS in place

The client realised they would have governance and user issues so stalled the M365 deployment. Votar were engaged to provide initial gap analysis, Information architecture, end user training and creation of business rules to support the adoption and use of M365.

### ACT CLIENT

#### Client adopted M365 with an add on solution to support compliance

As a result of several issues the client wanted to replace the add on solution and potentially implement the native 365 configurations to address regulatory compliance issues. We were engaged to help assess the situation - why change, pros and cons of any changes including what functionality could they loose relying on native M365. What's the implication on administration, costs (MS Licenses from E3 - E5) etc. This project included discussions with ICT, Security, Risk, Cyber and Records Management Professionals.

### VIC GOVERNMENT CLIENT

#### Client adopted M365 with a market add on solution to assist with governance and compliance

The original Information Architecture was revamped but failed to address the needs of the users and this impacted the user experience of Sharepoint and the add on compliance solution. Votar were engaged to review and update the Information Architecture (taxonomy, naming conventions, retention schedule and security access model). Once complete the client's internal MS Team will apply this to the M365 environment.

### VIC LOCAL GOVERNMENT CLIENT

#### Business Rules Document covering use of M365

Council have an EDRMS and have also deployed M365. Users requested guidance be provided by IT regarding the types of information they should keep in M365 / EDRMS. Votar established a set of business rules to guide staff in the appropriate use of M365, to ensure that information is protected, preserved and accessible to support operational requirements and legislative obligations.

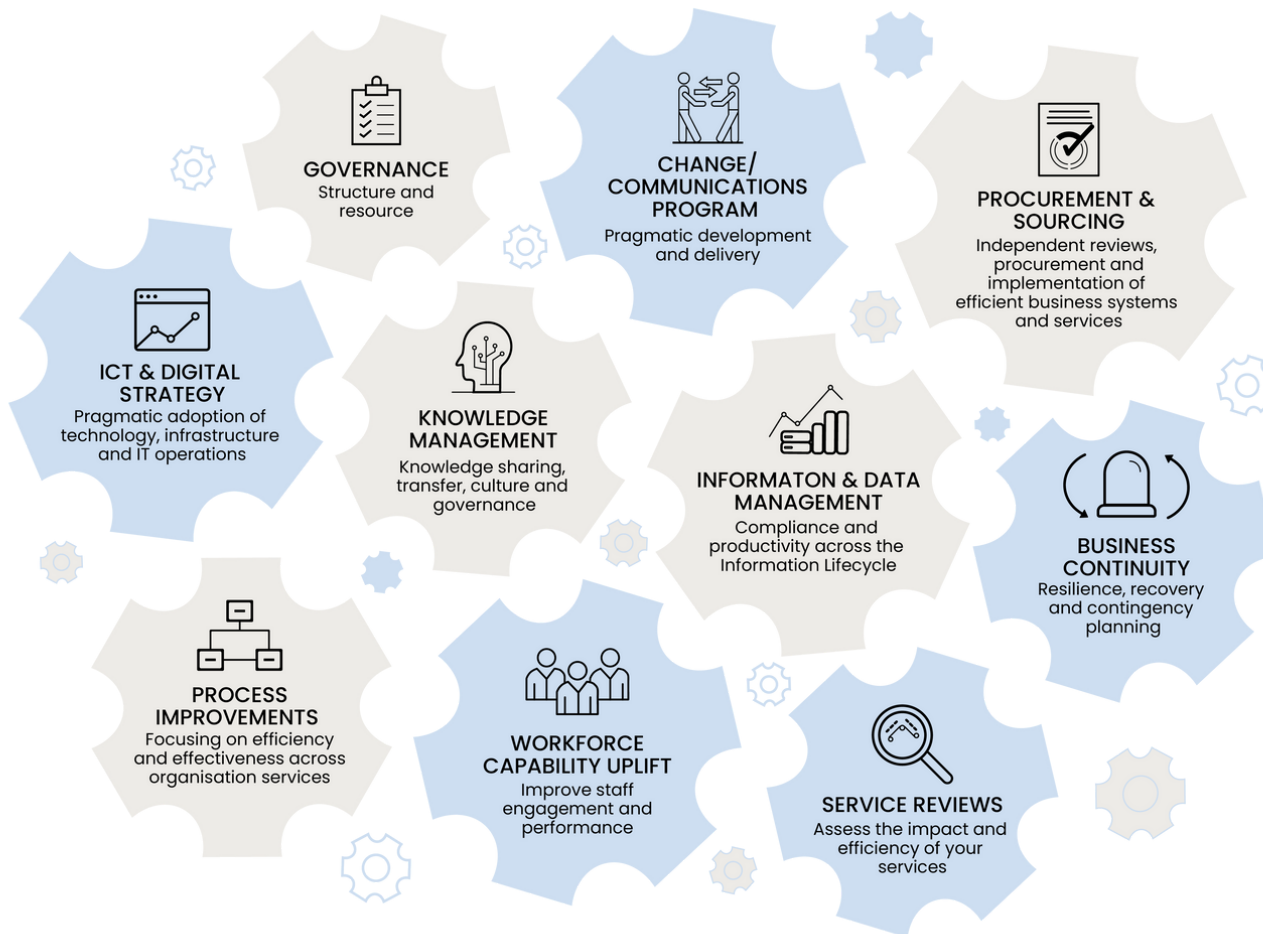
This guidance was necessary to ensure the Council creates, captures and maintains reliable information to support and provide evidence of the Council's activities and to meet legislative requirements.

# Services to Match Your Needs

Our core business product at Votar Partners is delivering business consulting services to our clients through consultation, analysis and reporting using best practice standards and methodologies.

Our focus on helping organisations navigate complexity in a reliable, evidence-based manner and this is especially critical during periods of significant change or disruption to service delivery models, be this due to technology, regulatory or funding changes.

Our longevity is based on maintaining a constant understanding and application of current and emerging trends and systems with a specific focus on the following key areas:



## Our Team

Delivering these services are a multi-disciplinary consulting team who are client-focused, **experienced and well qualified** technologists, business analysts, accountants and information management professionals.

Votar Partners recruits its consultants not only on their **deep subject matter knowledge** but on their ability to deal with people at all levels throughout an organisation and their advanced levels of communication skills.

## Proven Track Record of Success

A distinctive feature of Votar Partners is our aim to **quietly empower our clients** and, rather than steal the limelight, act in a support role to help our clients achieve their own success. For this reason, we don't advertise engagements.

To date we have **successfully delivered practical outcomes** on 1400+ assignments for a growing list of more than 300 clients including local, state and federal government, utilities, health, education and organisations in the not-for-profit and private sectors.

We strive to deliver measurable outcomes to our clients by providing impartial, evidence-based guidance through depth and rigour of analysis.



# Turn to Votar

Independent advice you can trust from a client focused, multidisciplinary team.

We strive to deliver measurable outcomes to our clients by providing impartial, evidence-based guidance through depth and rigour of analysis.

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