

Managing information within professional groups

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Abstract

Information management and relevant policies form the basis for effective and collaborative information creation, use and dissemination for professional groups. A content management system provides the infrastructure to support the capture, storage and secure access to this information. Commitment to information management and policy development helps to ensure the *corporate knowledge* created by the professional group is not lost, but used effectively to address the group's aims and objectives.

Introduction

Sound information management is essential if a professional group is to achieve its objectives and aims. Information needs to be managed as effectively as other crucial resources such as, people, money, assets and time.

A professional group can be a highly networked group of people who are dispersed throughout a wide geographic area, who actively engage in activities and services for explicit purposes within the aims of the group, and who are utilising, more and more, information and communication technology (ICT) to generate and receive internal and external information resources. These resources form the basis, in part, of the group's information assets. There is a responsibility for the management of this information in order to enhance the economic, social and cultural development of the group.

As information professionals, Bonanno (2002), Kirk (1999) and Todd (1999) refer to information: as *thing* – the tangible evidence of the way an group operates and transacts business; as *process* – a conversion and combination of internal and external information to construct knowledge to benefit the group; and as *knowledge* – the personal knowing, intuition, understandings and practical know-how that can potentially extend the group's knowledge base. Being able to integrate thing, process, and knowledge enables a professional group to make meaning of its information, create new knowledge, and to commit to appropriate and realistic courses of action to benefit the members of its community.

A step forward for a professional group is to develop an information management policy, which will guide, direct, control, and even protect, the group. This also involves an information strategy or process whereby the group establishes a framework for the management and organisation of information, which is supported by appropriate content management systems (CMS) and technology.

Characteristics of information management policy

Accountability – All stakeholders, that is, members involved in information use, knowledge generation and decision-making processes on behalf of the group, should

be accountable for all the information, in whatever form and from whatever source, that is collected, processed, stored and disseminated. Only information that is needed to fulfil the organisation's aims, management and operational needs is collected and maintained. There is a commitment by all stakeholders to the principle of managing its information resources and a commitment by the group to provide appropriate education, training and support.

Compliance – All stakeholders and the group should ensure that legislative and administrative requirements for managing information are adequately addressed. In particular, these will include Acts and legislative amendments relevant to the respective state or territory location of the group, such as the *Archives Act 1983*, *Copyright Act 1968*, *Digital Agenda Act 2000*, *Freedom of Information Act 1982*, *Intellectual Property Laws Amendments Act 1998*, *Privacy Act 1988* and, if applicable, *Groups Incorporation Act 1991*. The group commits to the monitoring of new Acts and amendments and assesses the implications for policy and practice. The group respects the knowledge in people's minds as their intellectual property. In return, it encourages stakeholders to use this for the work of the group and, before leaving, encourages them to contribute to the group's information base so that the *wheel is not reinvented*.

Information exchange – All stakeholders should be willing to engage in the collaborative processes of sharing information and knowledge with their colleagues, and with people outside the group, to preserve and enhance the reputation of the group. All users, internal and external, should have reasonable right of access to information that will help them to do their job and to work with others.

Information accessibility – All stakeholders should ensure that information, in a useable and retrievable form, is easily accessible to whoever is authorised to access it. The formats adhere to specific data standards to ensure quality of information and are compatible with existing technology. The group commits to the development and maintenance of CMS and technology to support the accessibility of information and provides appropriate human and financial resources to the management, development and use of information.

Preservation – All stakeholders should ensure that any information of enduring value and use to the group is appropriately preserved in an accessible format for a period of time. Archival, historical and current information is part of the group's *memory*.

Enhancement – All stakeholders should ensure that any information that is required for them to fulfil their role, and within their responsibility and authority, is reviewed, updated and developed. Continuity and sustainability is dependent on being able to enhance existing information and knowledge so that the group can meet new or changed requirements, make decisions, manage and develop initiatives, and respond to threats/opportunities in a timely fashion.

Privacy – All stakeholders should ensure the confidentiality of the group's information and take reasonable steps to secure personal, commercial-in-confidence and sensitive information according to the *Privacy Act 1998*. The group takes the responsibility to gather and collect only required information and ensures this is not

misused, intentionally or unintentionally, either within the group or through wider circulation.

Critical success factors and issues

Certain factors are critical to the successful implementation of an information management policy and practice for a professional group. It can be detrimental to a group if the critical success factors (CSFs) are overlooked or not addressed until a crisis emerges.

CSFs and concerns that need to be considered are:

Commitment – Due to the cultural makeup of most professional groups, whereby all honorary office bearers and members are working in a voluntary capacity, a commitment to information management can be inadvertently overlooked due to the busyness of their immediate work environment holding a necessary priority. Also, where it is crucial to integrate information with business strategy, it cannot be assumed that these stakeholders possess the necessary skills to transact this blend. A commitment to sourcing professional services can prove to be a highly strategic approach to information management and practice.

Procedures – If the group is to respond with efficiency and speed, then it must have clearly defined standards and procedures for information collection, dissemination, processing, storing, archiving and disposing. With the constant change of voluntary personnel involved in a professional group, there are times when standards and procedures are overlooked or not even addressed. Also, the group may be at fault in that it has not clearly communicated the standards and procedures to its stakeholders and/or it may not even have these in place.

Legal requirements – Often operational aspects of the group take priority, and together with either individual or group *good intentions* on behalf of the group, matters pertaining to the legal and administrative requirements are forgotten and/or not understood.

Measurement – At times, the measurement of the successful use of information is gauged solely by the financial status of the group. This has the potential to create a narrow focus for information management and decision-making. The raising of the professional profile of the group among external agencies, through successful use and dissemination of information, can provide a higher *return on investment*.

Culture and structure – The immediate work environment of the stakeholders can sometimes influence the culture of a group. If people are working within a traditional, hierarchical environment and they feel they are working in isolation or sense their contribution is under-valued, there may have a negative flow-on effect when engaging in the group's information use, knowledge-creation and decision-making activities.

Consequences of poor information management

At a micro level, poor information management practices can result in higher costs, reactionary decision-making, slower responses to requested information, missed opportunities and a poor professional image.

Some examples of inefficient use of information resources are:

- redundant information is collected

- information is disseminated too widely to be effectively used
- information is stored after its useful life has expired
- duplication of information, which is processed and stored by an affiliated group
- useful information is collected but is not made accessible to stakeholders
- information is destroyed before the end of its useful life or in breach of a legislative or administrative requirement
- inefficient and out-dated methods of collection, storage and retrieval
- lack of security
- when more than one group needs to be kept informed of changes to information, and related circumstances, this could frustrate users, incur unnecessary costs and produce inaccurate information.

Benefits of information management

On the other hand, well-managed information resources can result in improved processing, conversion and interpretation of information.

Specific benefits of sound information management practices include:

- more effective and efficient management of resources within the operational functions
- improved decision-making through provision of quality of information to achieve the group's objectives
- improved efficiencies and responsiveness to information requests
- creation of a collaborative environment geared to identifying and developing improved services and products, and responding to and initiating change
- improved accessibility to information and data
- reduced costs resulting from availability of complete, accurate and accessible information
- potential for increased value of information arising from the combination of information
- lower handling and storage costs
- basis for identifying appropriate CMS and technology to support productive use of information
- increased flexibility to facilitate integration of information from various sources, resulting in a faster response to change and innovation
- more stability, as information will be robust and require less maintenance
- improved knowledge to form the basis for responses to situations requiring evidence of actions.

Recommendations

Kirk (1999) and Orna (1999) advocate a process approach to information management, which integrates information and strategy for the development of an information management policy. An information-processing approach, together with effective strategies, is familiar territory to information professionals. The process engages the minds of the stakeholders, generates new information and facilitates the eventual CMS and technology, which integrate the essential information that constitutes the basis for a *knowing* organisation.

The organisation that is able to integrate sense making, knowledge creation, and decision-making effectively may be described as a *knowing organisation*.

The knowing organisation possesses information and knowledge so that it is well informed, mentally perceptive and enlightened. (Choo 1998, pp. 3–4)

Sense making, knowledge creation and decision making are the dynamic ingredients needed by a group to achieve its objectives and aims.

Objectives and strategic plan – This is a logical starting point as the objectives of the group and the strategic plan define the existence of the group. In particular, the objectives help all stakeholders identify the meaning of the group, to prioritise areas for information and knowledge development, and to participate in effective and productive decision-making. To initiate the process, simple questions can be addressed. For example, ‘What information do we *have* to meet the objectives?’, ‘What are we *currently* doing with the information we have?’, ‘What information do we *need* to meet the objectives?’, and ‘What *should* we be doing with *this* information?’

Roles of stakeholders – Firstly, there needs to be a commitment to the process by the senior management or executive committee of the group. These are the people who are directly involved in strategic planning and identifying the overall goals and methods of achieving those plans. They need to understand the purpose, benefits, scope, steps involved, time and resources commitment, and expected outcomes to complete the process.

Secondly, a smaller group should be authorised to manage the process on behalf of the group. It would be in the best interest of the group for these people to have a breadth of knowledge about the group, depth of experience of the group’s culture and structure, understanding of methodology for information processing, and presentation skills.

Finally, everyone within the group’s management and operational structure should be involved in the process of developing an information management policy. They should be fully informed of the process, and given the opportunity of contributing to the stages of the initial analysis of the objectives through to the establishment of a CMS and technology to support the integration of information and knowledge. In addition, it may be advantageous to access outside expertise, for example, ICT experts who have the skills and ability to organise information and knowledge objects as well as build the technology architecture/infrastructure to house these objects.

Information audit – An information audit involves the full examination of a group’s information activities and the impact these have on the group’s operations. As one author has noted, an information audit is:

A systematic examination of information use, resources and flow, with a verification by reference to both people and existing documents, in order to establish the extent to which they are contributing to an organisation’s objectives. (Aslib cited in Orna 1999, p. 69)

Before carrying out an information audit, it is essential to conduct an environmental scan and market research. This information is contained within the strategic plan of the group and identifies contributing factors such as: the nature of the group, its people, market focus, economic and educational environments, strengths, weaknesses,

opportunities and threats (SWOT) analysis, strategic focus and performance indicators, and operational issues. As previously discussed, it is also important to have analysed the information requirements in relation to the objectives, engaged the support of stakeholders within the organisation and the resources needed to complete the task.

Approach – To avoid *burn-out* of the (voluntary) stakeholders of the managing group it would be beneficial to commence with a small project, for example, the main publishing section of the group, or the senior management/executive committee in relation to a specific task.

The methodology used for conducting the audit can be a simple or complex approach. Orna suggests:

study and analysis of documents and of databases used in conveying information; observation of how people carry out information tasks; structured interviews; informal meetings of work groups to identify key problems; questionnaires; mapping and other forms of visual representation. (Orna 1999, p. 80)

The chosen methodology will have a flow-on effect in the analysis stage and this combination needs to be realistically considered within the boundaries of people, resources and time allocation, but not detract from the overall purpose of the audit, which is to match *what is* with *what should be*.

The presentation of the findings by the managing group could focus on the strengths, weaknesses, opportunities and threats for the group. It could recommend changes and propose ways forward. These recommendations and proposals need to be, initially, minimal-risk, short-term and presented to the stakeholders involved in the process.

Information management systems and technology – An information audit also provides the basis for sound decision-making in respect to the CMS and technology, which control, co-ordinate and make accessible the information and communication flow. It is important to design the infrastructure so that it suits the group's structure and culture, managerial and operational functions and incorporates *known* technology. It also has to be flexible so that it can evolve and change as the group moves forward.

Conclusion

An information management policy and strategy can provide a professional group with the leverage to:

- add value to its information and knowledge use and creation
- minimise reactionary decision-making and actions
- reduce costs, both financial and in human terms
- allow forward, outward, productive thinking to enhance sustainability.

It needs to be aware of and committed to managing its information in a professional and business-like manner and to integrate this information to its advantage through clearly defined standards and procedures effectively communicated to its stakeholders in a language they can understand.

The group needs to be aware of the wider legislative and administrative requirements and the impact these have on the information it uses, creates and disseminates. This

information needs to be documented and measured through the assessment of its ability to create new knowledge and to be proactive and innovative on behalf of its members.

Working collaboratively and openly in a supportive, networked environment to achieve the objectives of the group through effective information use, knowledge creation and decision-making can advance the professional status and vision of the group.

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