

Many Records and Information Management (RIM) professionals know of the pioneering work of Emmett Leahy<sup>1</sup>, an American icon in the development of the life cycle approach to managing records and information. However, little has been published about the major contributions of Canadians to the field and profession of Records and Information Management.

The Public Archives of Canada<sup>2</sup> pioneered records management concepts in the federal government going back to the 1930's. However, the growth of modern records management in businesses in Canada began in the mid 1960's. The Acme Seeley Company of Waterloo, ON invented and received a Canadian patent for associating colours and numbers – colour-coding of file folders with lateral filing was born! Meanwhile, new concepts for global organizations advanced as Canadian, Harold Moulds, was drafted to develop the first records management program for the United Nations in New York. The first Canadian chapter of ARMA was chartered in Montreal on December 16, 1968 and, a few days later, ARMA Toronto was chartered.

My personal story with RIM began in May 1970 in Canada. A summer job in a record center in Toronto turned into a full time position in the Records Management department at Canada Permanent Trust. My boss, Major George Mowat had brought his years of army quartermaster experience to this bastion of Bay Street and set about developing and implementing records retention schedules in all locations of the company. About the same time, programs like this and one led by Dick Parmenter of Inco, were emerging in major corporations across Canada.

By this time, the value of RIM was being acknowledged in the US, but many of the advances were happening in Canada. Colour-coding and lateral filing were significantly refined by Don Barber and Tom Scrymgeour of Datafile, Toronto, expediting its acceptance throughout Canada and the US. During the 1970's and early 1980's, virtually every North American insurance company, hospital, mortgage company, insurance agent, doctor and dentist office adopted the productivity and space savings of the Canadian invention of colour-coding with lateral filing.

Then, as the fledgling personal computer industry began to impact offices globally, Canada became a hotbed of innovation in automated records management software. Much of the credit for this advance in Canada was due to vendors being able to develop software that met standardized needs of the federal government. The "Block Numeric System" was adopted as a uniform file classification system for federal employees and spread to most Provinces. This spawned innovation like automated file tracking at Alberta Energy, Forestry, Lands and Wildlife under Records Manager, Norma Dalton; records management software advances led by Bruce Miller of Ottawa (Provenance and Tarian - which was later sold to IBM); and leading document and records management software companies in Canada like Hummingbird, PSS and OpenText.

ARMA International was not standing still during this period and some of its most significant advances were pursued by Canadians and occurred in Canada. It was in Toronto in 1975 that

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<sup>1</sup> Further information on Emmett Leahy can be found at <http://www.emmettleahyaward.org/leahy-bio.html>.

<sup>2</sup> Dominion Archives was founded in 1872, became the Public Archives of Canada in 1912 and renamed the National Archives of Canada in 1987, then in 2004, a combined entity, named Library and Archives Canada (LAC).

Don Barber and a group of Canadian and American records managers got together and negotiated the merger of what was known then as, the American Records Management Association (ARMA), with the Association of Records Executives and Administrators (AREA), into a new entity called the Association of Records Managers and Administrators - the predecessor of today's ARMA International. That same year, Don Barber played a major role in bringing about the creation of the Institute of Certified Records Managers (ICRM).

In 1980, a landmark conference on Records Management in Canada was held at the Banff Springs Hotel. Bob Morin of Saskatoon, was a passionate RIM pioneer who brought records management professionals together from across the country to put on the first Canadian Records and Information Management conference. Two years later, the conference was held in Montreal, with presentations and proceedings in both official languages. The ARMA Canada conference has since become a highly respected annual event.

Another phenomenon in Canadian records management occurred in 1980 with the creation of a Special Committee on Records Retention (SCORR), chaired by Ted Hnatiuk, with Carl Weise and myself, all members of the ARMA Toronto chapter. Supported by ARMA chapters across the country, SCORR was successful in petitioning the federal government to produce a definitive list of federal regulatory requirements affecting records retention. The first "red book" of federal records retention regulatory requirements in Canada was published in November 1980.

The following year, the membership of the Toronto Chapter of ARMA doubled to almost 300 members as the legal community began to understand the inherent value of records retention and management. The SCORR initiative evolved into a national Canadian Legislative and Regulatory Affairs (CLARA) group in 1982. Their mandate was to broaden the conversation and pursue Privacy and Freedom of Information, Trans Border Dataflow and Admissibility of Evidence – all harbingers of what was to come. These Canadian successes were the forerunners of the popular Canadian, Washington and Global Policy Briefs published today by ARMA.

Whether it is the ARMA International presidencies of Christine Ardern, John Smith, Jim Spokes and Rick Weinholdt, the impact of Don Barber on colour-coding world-wide, the Australian mentorship of Pat Acton, the global reach of the InterPARES projects of Luciana Duranti, the national leadership of Judi Harvey, Sandi Bradley, Caroline Werle and Ted Ferrier, (without whom there would be no goosing ceremonies) or the National Archives outreach of John McDonald, Canadians have been at the forefront of innovation and leadership in records and information management. It is not surprising that there have been four Canadian Fellows of ARMA International<sup>3</sup> and seven who have received the highest global award in the records and information management profession, the Emmett Leahy Award<sup>4</sup>.

Canadians should be very proud of the people, ideas and products that have been made, and continue to be made that have such a global impact on Records and Information Management.

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<sup>3</sup> No. 7 Judi Harvey, No. 15 James Coulson, No.26 Christine Ardern, No. 47 Sandi Bradley

<sup>4</sup> Anneliese Arenburg 1989, Patricia Acton 1992, James Coulson 1997, John McDonald 1999, Christine Ardern 2002, Bruce Miller 2003, and Luciana Duranti 2006