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## *Tips For Environmentally Friendly Records Management*

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## Introduction

As environmental issues garner more and more public attention, many organizations are discovering first-hand that good environmental practices are good for business. From the cost savings associated with resource conservation to the slightly less tangible benefits of increased consumer and shareholder confidence, proactive steps to protect the natural environment can directly translate into an improved bottom line. The growing emphasis on the environment is readily apparent to records managers, as the fastest growing and most carefully managed file collections in many companies are those that provide evidence of impact assessments, site remediation and other environmental protection activities.

As a source of both evidence and information, records play a critical role in responding to the legal and operational consequences of environmental management activities. But the role of the records manager in the new green economy is not limited to organizing, accessing and managing records of other departments. Beyond their intellectual content, paper and electronic records comprise one of a company's largest physical assets. How those assets are used and managed, then, can be a critical factor in maximizing the productivity of natural resource utilization and minimizing the environmental footprint of a company's overall operations. The tips provided in this article can help companies meet that goal by applying sound environmental stewardship to the proactive management of physical and electronic record media across all stages of their life cycle.

## Tip #1: The more you throw away, the more you can conserve.

Traditional wisdom states that the best way to reduce waste is to throw out less material. This makes perfect sense as long as the retained material is put to constructive use. When we apply this equation to records management, a paradox emerges. Without application of sound records management principles, a company can end up storing literally tons of records that have limited legal or operational value. Regardless of their relative value (or lack thereof), these records take up valuable space, to say nothing of the natural resources that go into running an office building or storage facility from one month to the next.

An effective media recycling program puts otherwise useless materials back into productive circulation as raw material, while at the same time freeing up space and maintenance resources that are better used meeting other corporate objectives. Beyond its clear environmental benefits, reducing wasted space can also mean huge savings in real estate costs, particularly in markets such as New York City and Calgary, Canada, where leasing and maintenance costs are at an all time high.

To help your company meet this cost saving goal and help protect the environment at the same time, look for possible opportunities to remove material which is no longer needed, particularly:

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*Replacing traditional lateral filing equipment with a high-density mobile storage system will improve space usage by 339%.*

- Duplicate copies, outdated publications, draft documents and other "non-record" material for which there are no record-keeping requirements beyond their immediate usefulness. If your company does not already have one, you should develop a policy authorizing employees to dispose of non-record material at the earliest opportunity. To ensure comprehensive implementation of the policy, consider conducting regular clean-up days to identify and purge non-record material across the company.

- Official records whose standard retention periods have lapsed. If your company already has a retention schedule, regular clean-up days should include identifying records that have reached the end of their retention period and have no further legal or business need to be retained. Eligible records should be disposed of via a secure destruction method that also allows for recycling of paper and other raw materials. If your company does not have a records retention schedule, then it should develop one at the earliest opportunity. Records should be divided into categories based on the business activities which they support, and each category should be assigned a standard retention period which incorporates all legal and operational requirements that apply to the particular business activities and records.

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### *Tip #2: If you must keep it, store it efficiently*

Despite the benefits of a document disposal and recycling program, most companies will still have a significant volume of recorded information which must be retained either for direct business use or to meet longer term legal requirements. The environmental footprint for storing those records can be further optimized by selecting filing equipment that allows for maximum storage in as little space as possible. Some recommended equipment choices include:

- Lateral filing: More traditional vertical filing arranges files from front to back in a pull out drawer. A four foot deep vertical file cabinet requires an additional four feet of floor space at the front to accommodate the pull out. Lateral filing avoids this problem by arranging files from left to right, reducing the necessary clearance space to the length of one file folder. When lateral filing is combined with an end tab folder design, the clearance space drops to zero, as file labels can be read and folders removed without a pull-out drawer or shelf.

- Mobile shelving systems are equipped with rollers which sit on tracks in the floor. Instead of one aisle for every two rows of stationary shelving, a mobile solution can function with as little as one aisle, which users move to access files in a given row. Less aisles means either less total floor space needed to store the same volume of files, or more storage potential in the same space.

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- End tab file folders are designed to hold labels on the side rather than the protruding top tab of more traditional folders. This design eliminates the need for pull out drawers and bulky hanging folders, as well as allowing more rows of labels to be readable from a normal standing position. More usable shelving rows are available, and more folders fit into each row.

The impact of smart choices in storage equipment and supplies can be tremendous, allowing companies to slash the footprint of a records storage program while at the same time increasing its storage potential. Many companies have found that by combining smart storage design with the document disposal techniques discussed under Tip #1, they have been able to store more than three times the volume of records in less than half the floor space required by older, outdated storage systems.

### Tip#3: Use offsite storage wisely

While smart design can reduce the environmental footprint of a given file collection by storing more records in less space, a commercial storage facility can slash it further by taking advantage of bulk storage opportunities. Records which are no longer needed for regular transaction use or reference can be transferred to an offsite or near site warehouse facility which stores records in boxes on shelving several stories high. The key is to select records for offsite storage carefully and manage the flow of records to and from storage. The benefits of storing a given file offsite would be negated quickly if that file were shuttled back and forth between the two locations every other day. It is therefore important to consider the retrieval needs associated with file collections and confirm that they do not exceed the benefits of the storage method itself. Nevertheless, some records will need to be retrieved eventually. The most cost-effective and environmentally friendly offsite storage programs are those which optimize the productivity of each trip to and from the storage facility. This is especially important for the "near line storage" options embraced in particularly expensive real estate markets like Calgary. By structuring file requests around a regular schedule of bulk deliveries and pickups, near-site facilities such as TAB's Centre of Excellence ensure fast access to even the most active file collections while at the same time maximizing the retrieval output of every mile travelled.

### Tip #4: Choose environmentally-friendly filing products

As consumer interest in protecting the environment continues to grow, manufacturers have responded with a range of products aimed at reducing waste. The records management industry is no exception, introducing products which help save the environment and reduce costs at the same time. Here are just some of the questions to bear in mind when assessing current or proposed filing supplies such as folders, pockets and labels:

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- Are enclosures expandable where needed, allowing them to occupy minimal space while allowing for future growth in content?

- Are products physically durable over the life cycle of the record, reducing the need to replace file enclosures and throw out the old ones?

- Can folders or other enclosures be reused effectively once the actual documents are disposed of?  Can labels be removed cleanly?  Does the material allow writing to be erased?

- Are paper materials fully recyclable?

- Where products contain Mylar or other non-paper material, does it meet biodegradability standards such as the European Union's EN13432 or the US Standard Specifications for Compostible Plastics (ASTM D-6400-99)?

### Tip #5: Promote a 'Less-Paper' Office

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Ever since the advent of office computing systems, information management publications and mainstream media alike have painted visions of a "paperless office."  The implications of this vision are readily apparent for anyone interested in conserving the valuable renewable resources from which paper is produced.  But most companies in the computing age have seen their paper output increase rather than decrease.  Until information technology no longer includes a print function, it is unlikely that most of us will ever see a truly paperless workplace.

None of this is meant to discourage the environmentally conscious records manager.  Even if the vision of a completely paperless office does not reflect the current reality in many companies, records management best practices do promote the very achievable environmental benefits of a "less paper office."  Opportunities for achieving these benefits lie both within and beyond the world of paper itself:

- Within the paper world, a corporate records management program can help reduce a company's paper consumption and output through centralization of shared filing collections.  Depending on a company's particular business processes and geographic distribution, it may make considerable business sense to replace parallel files in individual offices with a single, centrally controlled shared file.  All relevant documents are kept together, eliminating the need for each team member to copy the same document for their own file and use separate filing supplies. The arithmetic of paper conservation is simple; ten different file folders, each with their own copy of the same document, uses ten times as much paper as one centrally stored, shared file.  As well, central control makes it easier and more reliable to identify non-record material and official records whose retention periods have lapsed, a critical step in implementing the recycling initiatives discussed earlier under Tip #1.

- As both a direct alternative and a complement to the paper file, electronic document management systems (EDMS) offer their own automated brand of centralized file control. Just as a centralized paper file can be signed out by users, updated, and returned to storage, so too does an EDMS track which electronic documents are in use by which users at a given time. This version control prevents divergent strands of the same document from evolving across different areas of the network. Users are encouraged to work with the reliable electronic original, and any paper copies created for temporary use can at least be captured by non-record purging and recycling.

## 6. Tip #6: Look beyond your loading dock

The principles of environmentally responsible records management continue to apply well after records reach the end of their life cycle and are removed from our offices or storage facilities. Whether your company physically disposes of its own record media or outsources the task to a service provider, it is useful to assess whether the disposal methods themselves are consistent with the criteria discussed above. In the case of paper, can you confirm that the records do not end up in a landfill once they are securely shredded? Recycling is an integral part of the waste management industry, but in the absence of concrete assurance that paper is indeed recycled, it is not enough to simply assume that it is so. Also, don't be afraid to ask questions about the recycling operation itself. Is the output volume of recycled paper product optimal in terms of both the raw material sent for recycling and the resources used to run the operation? Do any of the chemical or other agents used in the process present an undue environmental risk?

Nor are the environmental implications of record destruction limited to paper products. By sending obsolete or superseded computing equipment to an approved recycling facility rather than tossing them into the nearest dumpster, your organization can extend the useful life of the raw materials that make up the equipment and reduce the risk of dangerous toxins being released into fragile ecosystems. Better still, gently used equipment can be donated to an educational institution or other non-profit organization, resulting in direct tax benefits and improved public relations. In either case, just make sure that all data and metadata stored on the equipment is deleted beyond all chance of recovery via a secure data wiping process.

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## *Conclusion*

This article outlines how a records management program can contribute more directly to corporate efforts to conserve natural resources and mitigate risks to the environment. Six critical steps in the process include:

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| **1** | Removing unnecessary material which otherwise occupies storage space and consumes related resources; |
| **2** | Designing in-office storage systems which make more efficient use of space; |
| **3** | Using offsite or near-site storage solutions which optimize the productivity of distribution processes; |
| **4** | Choosing environmentally-friendly file folders and other supplies; |
| **5** | Promoting a "Less Paper Office" via centralized physical filing and electronic document management systems; and |
| **6** | Recycling paper, computing equipment and other record storage media as efficiently as possible. |

Effective application of these tips depends on a total solution approach to managing recorded information. Many records managers would do well to emulate the approach of the environmental management professionals whose records they help organize, access and manage. A comprehensive environmental protection program examines both short and long-term impacts of industry on the separate but interrelated realms of land, air and water. An environmentally-friendly records management program should be just as comprehensive, managing paper, electronic and other media across each phase of their life cycle.

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