

## Case study: Healthcare Trust, UK

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### Background

Following the merger of four organizations, this primary care trust (PCT) reviewed its records management strategy, which included archiving records in more than 20 locations.

“Due to the volume of legacy documentation from the former PCTs ... it was important for [us] to develop a system held centrally, and locally to log and keep track of the whereabouts of documentation.

“Most importantly, it was necessary to ensure that documentation was reviewed, destroyed and archived according to the records management strategy,” said the client’s associate director of corporate services and governance.

### Problems

The client’s representatives contacted Crown Records Management anticipating that they would be able to provide further guidance and assistance. “With so many sites it had become impossible to keep track of what was stored where, making it difficult on occasions to locate documents. We recognised we needed the help of external specialists to get us back on the right track.”

The PCT appointed Crown Records Management to help them to identify the important issues and create a strategy for the on-going management of the PCT’s records.

Crown Records Management began assessing the scale of the requirements. This entailed visiting every site and the scope of its requirements. Once the issues had been fully understood and documented, Crown Records Management was able to propose an approach which recommended managing documents at each site by order of potential risk.

### The Solution

#### Eating the elephant, one piece at a time

This strategy was agreed throughout the organization and Crown began the long task of cataloguing the information stored at each of the sites and recording, storing and archiving documents.

A number of the PCT’s offices were relocating so Crown Records Management took charge, logging, archiving and storing their documents.

Jeff Chapman, from Crown Records Management said: “Just the process of cataloguing the PCT’s documents took over a year. But once that was completed, we were able to turn our attention to scanning the documents, so that they could be electronically stored, which saves space.”

A significant amount of the PCT’s documents are now electronically stored by Crown Records Management’s office in Peterborough, but they can be easily accessed if required, because of the cataloguing system now in place.

“Electronic storage is the final part of the solution we offered the PCT as it enables them to store their documents in one location but be able to access them quickly if required,” said Jeff Rowley, from the Crown Records Management’s scanning bureau in Peterborough.

The strength of the working relationship was a factor in making the project so successful. The two organizations worked well together from the outset. Crown were able to undertake what seemed to the PCT to be an unmanageable and daunting task and systematically address each issue. Together they put in place workable solutions for the immediate and long term benefit of the PCT.

“We have worked with Crown Records Management for over four years now. They have assisted in developing and implementing a consistent approach to records management by rationalizing and proactively managing the process. They have provided an excellent service and been excellent value for money.”

“It has taken a few years, but now that our documents are catalogued and stored, either electronically or as archived files, we are confident that we are leaving a more structured and organized legacy,” concluded the client.