

Cardinia Shire Council

M365 Migration Journey & The covid 19 pandemic

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Services

introduction

Welcome, everyone, to today's presentation on the transformative journey undertaken by Cardinia Shire Council to revolutionize its records management practices.

In the next 15 minutes, we'll delve into the challenges faced, the solutions proposed, the approach adopted, and the remarkable results achieved.

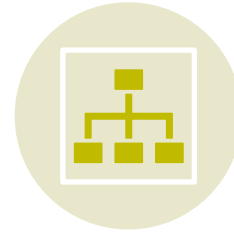
background

- **Imagine a workplace where the rustle of paper has been replaced by the hum of digital efficiency, where the clatter of printers is but a distant memory, and where the once bustling file rooms now stand silent in their digital reincarnation. Welcome to Cardinia Shire Council, where a journey toward digital excellence has transformed the very fabric of our organizational culture.**
- **Investing time, effort, and resources into creating a paperless digital office was not merely a decision; it was a strategic imperative. Led by visionary figures like CEO Gary McQuillan, Director Corporate Services Derek Madden, and CIO David Jackson, our organization embarked on a transformative path. These pioneers laid the foundation for a culture ready to embrace the next phase of our digital evolution.**
- **Transitioning from paper-based processes to digital workflows required courage, commitment, and collaboration. Yet, every milestone achieved, from switching off network drives to automating mail management with AI, paved the way for our next leap forward. Through these landmark achievements, we forged a culture of innovation, adaptability, and resilience—a culture primed for the challenges and opportunities that lay ahead.**
- **David Jackson, our steadfast leader, remained at the helm to guide us through this next stage of transformation. With unwavering dedication and a tireless spirit, he shouldered the weight of responsibility, earning our trust, loyalty, and admiration.**

Our challenge/issue addressed



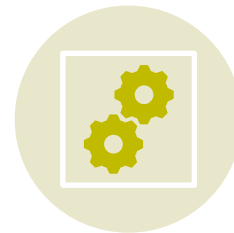
Historically, Cardinia Shire Council boasted an excellent records management culture.



However, less than 50% of records made their way into the official Electronic Document and Records Management System (EDRMS).



With over 20,000 compliant records being generated monthly, alongside a significant number of uncompliant records in legacy network drives and undocumented locations, it was clear that a paradigm shift was needed.



Our task was to bring staff on a journey that supported them to experience seamless and more compatible records management that enhanced their day-to-day work patterns.

INVESTMENT & VALUE

In mid-2019 it was agreed that the existing records management approach needed to grow

We had 12 months to convert existing record capture from less than 50% of generated corporate records to 100% of corporate records

We needed to be able to have oversight and management of all information assets and not just the limits of the EDRMS


Governance controls for records management compliance would be established to cover the whole SharePoint environment



M365 and SharePoint would give us full oversight and control

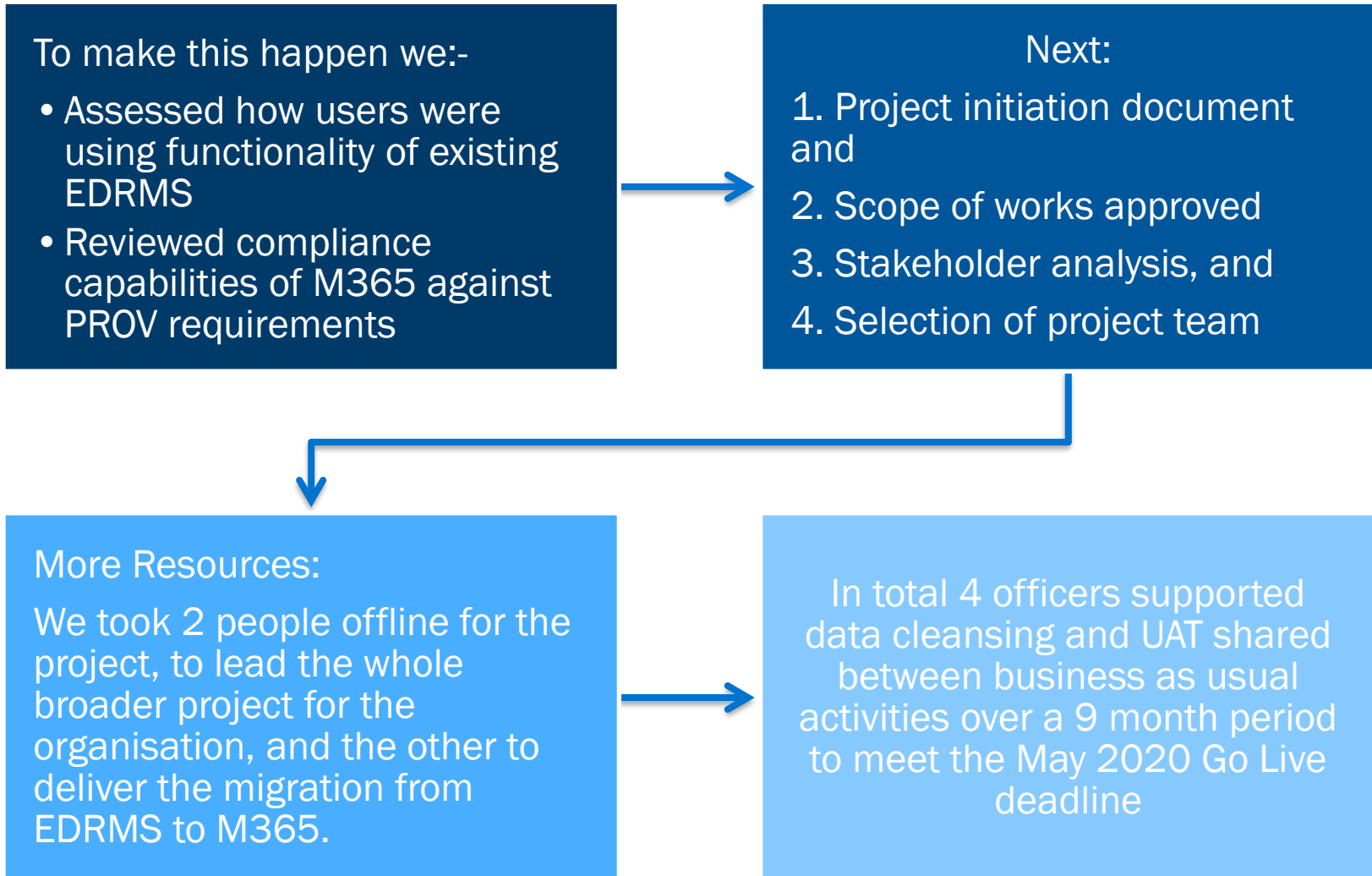
SOLUTION PROPOSED & ACCEPTED

In mid-2019, the council embarked on an ambitious plan to replace its existing state-of-the-art system with a more user-friendly solution aligned with 21st-century demands.

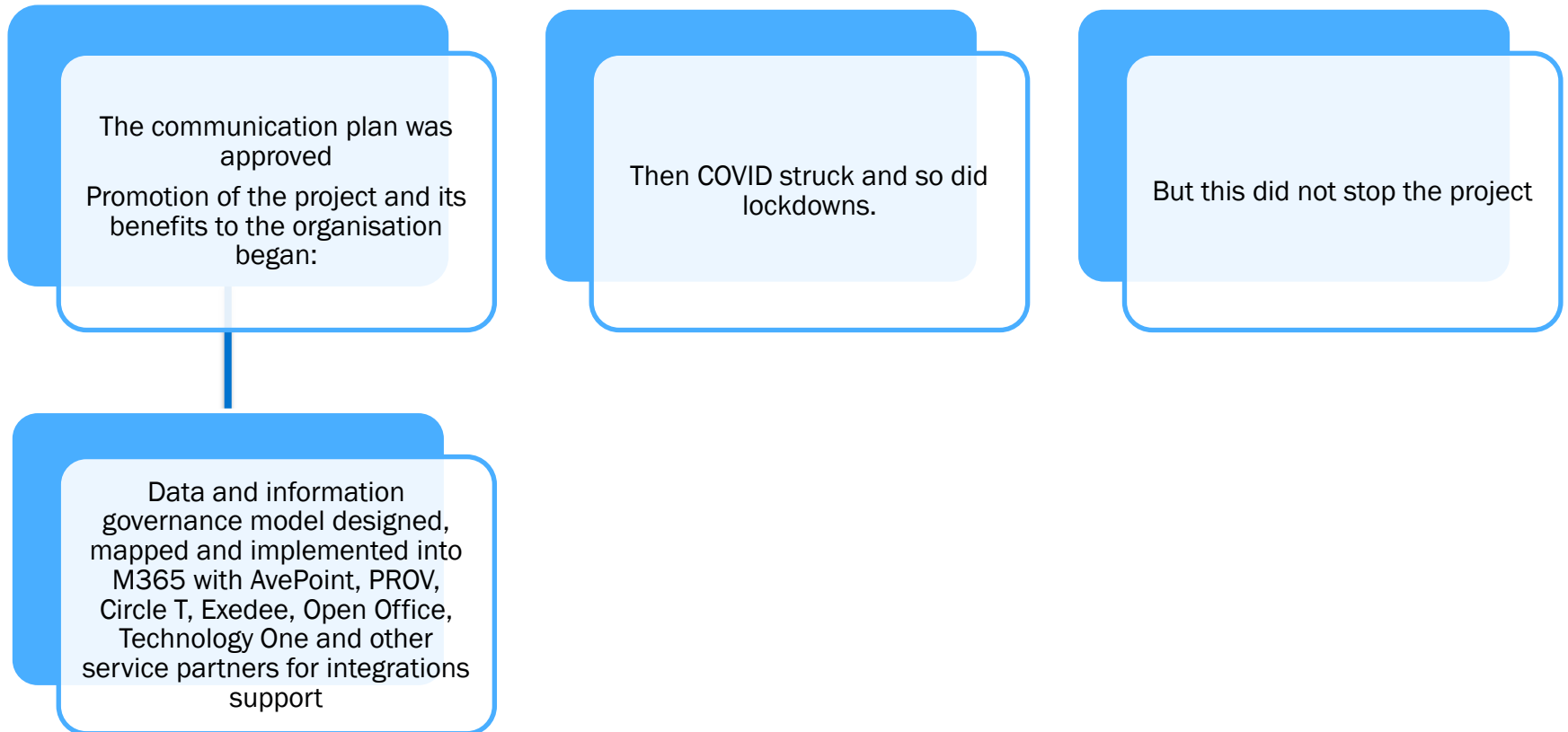


The goal was to achieve 100% compliance in record capture while leveraging Microsoft 365 (M365) capabilities to streamline processes and enhance governance.

APPROACH



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Users migrated their desktop content into the EDRMS to maintain key records



Migration of 5 terabytes of metadata and records commenced with UAT and Q & A and our 20 May 2020 was met



Comprehensive training supported with Intranet Help and bite sized instructional videos were created with the help of volunteer users



Information Management began a 3 week intensive virtual classroom training for the whole organisation



Drives were completely shut down in December 2020 except for application use (example: Flexipay)



Records Help service desk was established for ongoing user support

RESULTS & BENEFITS REALISED

The outcomes
of the project
were
transformative:

- Records management as normal part of business process
 - across the organisation continues to become embedded as normal business practice
 - with the ease of M365 functionality offered attracting those 50% of users who had struggled with mainstream EDRMS
- Desktops were migrated to OneDrive,
 - enabling RM governance application with top billing access given to an Records and Information Management based staff member
- The entire document lifecycle,
 - from creation to disposal,
 - is now possible to be managed under a unified governance model.
- External record sharing is now
 - streamlined and audit-trailed within Teams and SharePoint
- End-user adoption and satisfaction has soared
 - from those who were once technology and IM challenged,
 - driven by user-friendly interfaces and accessibility
- Overall costs reduced significantly, with future-proofed flexibility and mobility.
- Positive interdepartmental relationships continue to foster a collaborative work environment, ensuring ongoing success

TRUST RESPECT RELIANCE SUPPORT TEAMWORK COMMUNICATION



One exceptionally positive and unexpected success of the project was the close relationships of respect and understanding that formed between the technology and records management team members.



We learned to understand and appreciate one another's language and concerns.



We work well together and communicate daily to ensure we deliver the best outcomes for our organisation and our customers.



We know we are dependent on each other for our successes to be realised.



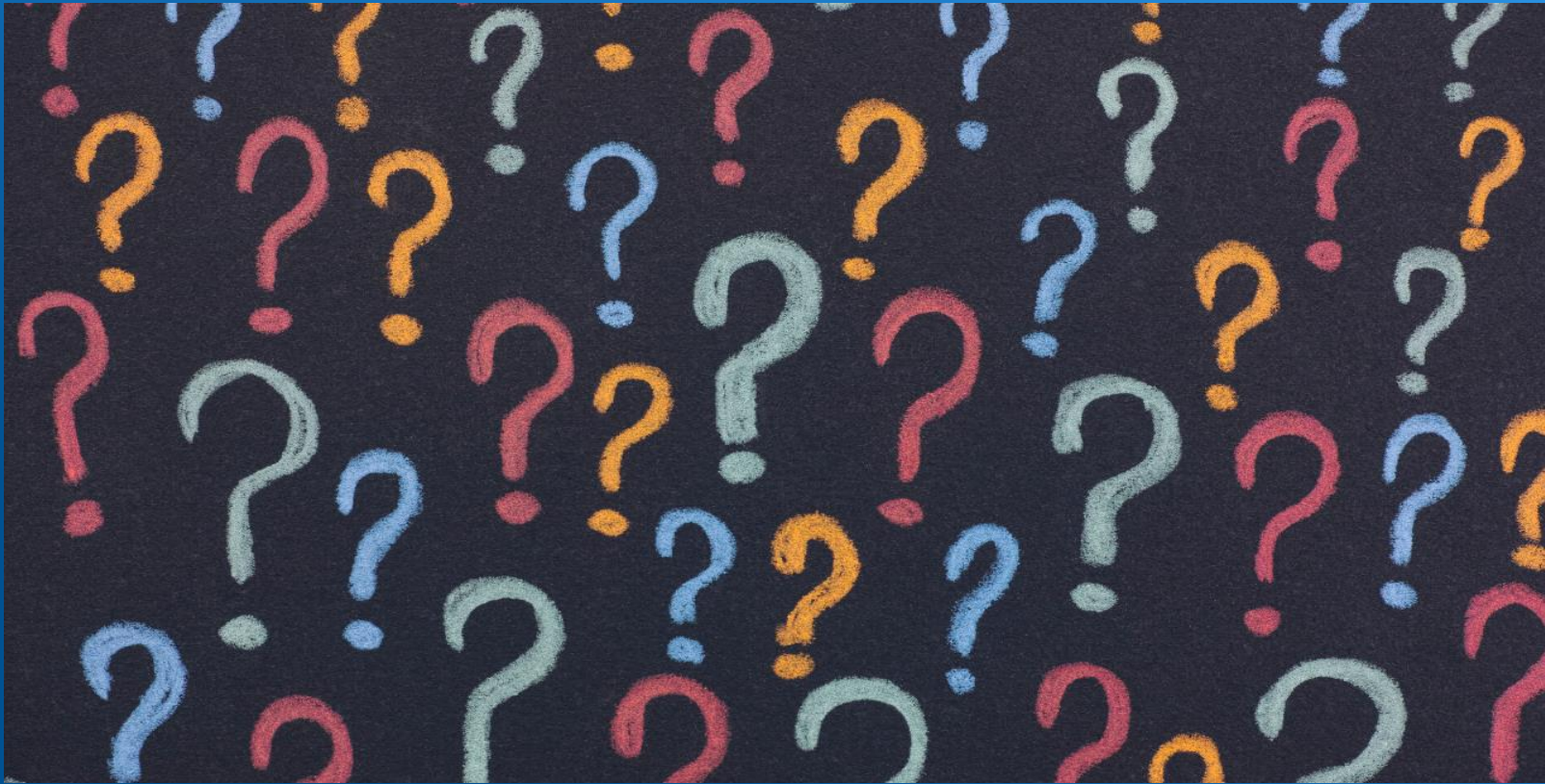
We understand and value each other's contribution to the success of the ongoing maintenance and development of M365 as our records management system.

THE JOURNEY CONTINUES



- In conclusion, the journey to digital transformation at Cardinia Shire Council continues, and it exemplifies the power of innovation, collaboration, and resilience.
- By embracing change, leveraging technology, and prioritizing user experience, the council has not only achieved its records management goals but also positioned itself for continued success in the digital age.
- As we navigate the complexities of the modern world, I would encourage their story to serve as inspiration for organizations embarking on their own transformative journeys.

Questions?



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