

Information Governance Specialist

Morguard • Mississauga, Ontario, Canada

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The Information Governance Specialist is accountable to the Senior Vice President, General Counsel & Secretary for overseeing all activities related to the recordkeeping aspects of the organization's Electronic Document Record Management System (EDRMS) system. This position is responsible for the daily oversight and operation of the recordkeeping function of the EDRMS system, measurement of Records Information Management (RIM) performance indicators, disposition of electronic and physical records, and works very closely with IT. The Specialist is solely responsible for all recordkeeping aspects of the EDRMS, and is responsible for guiding IT and other stakeholders on the successful initial implementation of the EDRMS.

DUTIES AND RESPONSIBILITIES

EDRMS System

- Participate in the development, implementation and management of records and information management policies, standards and procedures as they relate to the EDRMS systems and records management in general.
- Define, implement, and test automated EDRMS rules for the declaration, classification, storage location, and other recordkeeping actions for digital records.
- Work with IT in applying standard project management techniques to various stages of project implementation.
- Work with IT to define and develop technical specifications for any required integration between the EDRMS and any corporate business systems.
- Work with business users and IT to define and implement appropriate email management procedures such as identification of email as a business record, automatic email deletion, and processes for declaring email as a record.
- Provide input and support for the implementation and maintenance of the EDRMS system including training, testing, troubleshooting, support, set up, access and security provisions.
- Work closely with IT to define the appropriate configuration of the underlying Enterprise Content Management system, including document/content types, document metadata, metadata taxonomies, selection lists, storage locations, security, and other characteristics, policies, and behaviours of the ECM that effect recordkeeping.
- Work with IT to install and test system upgrades, additions, and patches to ensure reliable continuous EDRMS operation.

Communications and Training

- Participate in the development, implementation and delivery of Records Management communication strategies and training programs.
- Work with business users to define and implement standardized document naming conventions in support of recordkeeping.
- Collaborate across the company to facilitate and support adoption of consistent records management practices and procedures.

Vendor Management

- Maintain a close working relationship with the EDRMS software vendor(s) to learn software capabilities and limitations, and to resolve technical problems in as short a time as possible.

Records Management

- Identify case versus administrative records and define and implement appropriate case selection and identification mechanisms such that each type of record is handled appropriately through to end of life.
 - Using the EDRMS system, carry out disposition of electronic and physical records in accordance with the retention schedule, and with the necessary minimum level of classification accuracy.
 - Define and implement all necessary characteristics of physical records (folders, boxes, and artifacts) such that they can be tracked, labelled, and have disposition applied to them via the EDRMS.
 - Maintain a strong working proficiency in core ECM operations such as the definition of metadata, creation of document types, storage locations, and basic operation of the ECM component of the EDRMS.
 - Identify Personally Identifiable Information (PII) and implement appropriate handling and protection of such information within the EDRMS.
 - Hold an advanced knowledge of search and e-discovery capabilities of the EDRMS in support of FOIP or court-ordered information retrieval.
 - Apply a legal hold to responsive records both within and outside the EDRMS in response to a FOIP or court-ordered investigation.
 - Provide expertise and guidance to the business regarding records and information management related matters (i.e., taxonomies, retention, privacy), and assist them in records compliance activities (e.g. requirements gathering, solution development/implementation, annual records disposition reporting, destruction and certification of destruction process).
 - Work with business users to define and document specific requirements for document metadata, filing locations, and appropriate security permissions.
 - Work with IT to develop comprehensive Standard Operating Procedures (SOPs) for the EDRMS system.
 - Define a retention schedule with characteristics suitable for importation into a modern EDRMS software system.
 - Conduct various appropriate analyses (duplication, records value, etc.) of existing digital records for migration into an EDRMS system.
 - Collaborate with all Information Governance stakeholders to achieve information management goals.
 - Monitor all recordkeeping functions of the corporate EDRMS system operation and proactively addresses any gaps in recordkeeping or information management
 - **Reporting and Best Practices**
 - Conduct periodic measurement of key EDRMS recordkeeping performance indicators. Report findings, recommend and implement mitigation of unsatisfactory performance where appropriate.
 - Administer best practices for the management of electronic and physical records, particular as they pertain to the EDRMS system.
 - Participate in records management training and benchmarking activities outside the organization and bring knowledge of potential improvements in electronic records management approaches to the project team.
- Any other job-related duties and/or projects that may be assigned.

Skills, Knowledge, Experience and Education

- Bachelor's degree in Business, Library/Information Management or related field, or related experience and training.
- Minimum of 2 years of experience in RIM.
- Experience working collaboratively to analyze processes and implement improvements.
- Strong knowledge of computers, databases and electronic records management functionality in document management and collaborative systems (shared drives, SharePoint, OpenText, etc.)
- Basic understanding of physical records management, i.e. the storage, marking, tracking of boxes and other forms of physical records.
- Understanding of record management techniques, migration methodologies, and metadata standards.
- Advanced knowledge and experience with MS Office applications (Word, Excel, PowerPoint)
- Minimum 1 year direct experience with Electronic Content Management systems (SharePoint, OpenText, FileNET).

Core Competencies

- Outstanding communication and presentation skills to convey complex information to all levels of the company.
- A team player with sound project management, leadership and negotiating skills.
- Strong listening, interpersonal, verbal and written communication skills.
- Strong analysis and problem-solving capability.

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About Morguard

Morguard is a fully integrated real estate company. We own, manage and invest in high quality, well-located, geographically diversified assets across North America. We built our business with strong leadership and a proven management platform that has generated substantial, risk-adjusted returns – and significant long-term growth for our investors. Morguard has significant investment and management capabilities in multiple asset classes including office, industrial, retail, multi-suite residential and hotel. With 40 years of experience and a dynamic team of over 1,500 professionals, our commitment is to realize the potential of real estate through value creation and operational excellence.

Today, our total assets owned and managed is valued at \$21.0 billion. Morguard operates three diversified lines of business: Investments in Real Property: Morguard owns and manages a diversified portfolio of multi-unit residential, retail, office and industrial, and hotel properties in North America. Real Estate Investment Trusts: Morguard is a significant sponsor of two real estate investment trusts (REITs): Morguard REIT (TSX: MRT.UN), a closed-end Trust with a diversified portfolio of Canadian commercial real estate assets; and Morguard North American Residential REIT (TSX: MRG.UN), an open-end Trust with a diversified portfolio of multi-unit residential assets across North America. Advisory and Management Services: Morguard provides real estate advisory services and portfolio management services, specializing in publicly traded equities and fixed-income securities, to institutional clients and private investors.



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