

Integrating Archives, Records, and Research

Consumers Union/*Consumer Reports* has successfully integrated its records, archives, and research operations into the everyday business of the organization

Kevin Manion

Effective management of resources is a challenge for all information professionals. A common thread shared by all organizations, at least among those that successfully manage their resources, is the ability to directly affect the business of the organization. Successfully integrating different functions such as records, archives, and research, and understanding how these areas relate to each other and to the organization as a whole, not only helps create and build a department's place within an organization but also helps that department understand the business of the organization and all the moving parts.

Rather than being perceived as functions that serve the organization – a traditional client-service relationship – research and information management

activities need to be positioned as integral to organization-wide business operations. It is the responsibility of information professionals to make that case and to actively demonstrate the benefits of such an approach.

At the Core

This article

- ▶ discusses the importance of integrating records, archives, and research within an organization
- ▶ examines Consumers Union's Strategic Planning and Information Services Department and how it has integrated records, research, and archives
- ▶ explains the importance of integrating these assets within every organization

Information Services at Consumers Union

At Consumers Union/*Consumer Reports*, the records, archives, and research operations have been and continue to be successfully integrated into the everyday business of the organization. Founded in 1936, Consumers Union, publisher of *Consumer Reports* magazine and other publications, is an independent, nonprofit testing and information organization serving consumers by providing unbiased advice about products and services, personal finance, health and nutrition, and other consumer concerns. Consumers Union's advocates tackle tough consumer issues from offices in Washington, D.C., San Francisco, Austin, Texas, and Yonkers, New York. They testify before federal and state legislative and regulatory bodies, petition government agencies, and file

lawsuits on behalf of the consumer interest. The organization's ultimate goal is to help keep consumers informed so they can make wise purchasing decisions and to create a safer, fairer marketplace.

Consumers Union's Strategic Planning and Information Services Department (SP&IS) was created in November 2003 as a result of a merger between the Information Center and the Market Information Department. In an organization where testing and reporting are based on solid facts and deep investigation and research, the selection of the Information Center as the entity to develop a strategic plan made complete sense. As a result, the department was renamed to underscore the importance of the undertaking. In addition, the senior director of the unit was promoted and joined a team of 13 senior executives who, with the president, lead the organization, ensuring that it keeps on track with its mission and goals. The senior director leads this activity and is supported by a senior researcher and ad-hoc staff from across the department.

The new department combines the strengths of a corporate library and information service – traditionally responsible for answering questions related to the organization's business and testing program and for research related to consumer behavior – with a market-focused research department responsible for understanding products, sales, and markets. A new activity for the department, strategic planning, was also formally recognized at that time and allocated specific resources.

The department, now comprised of some 20 information professionals, manages the organization's records and archives and is at the nexus of providing the research and analysis that contributes to the testing, advocacy, and publishing programs of the organization.

The SP&IS team works to ensure that the research it contributes to fulfilling the mission of the organization is timely, representative, and appropriate in

content and scope. The staff works in various areas of research and information management, bringing together internal and external resources that contribute to the vast research and knowledge base of the organization.

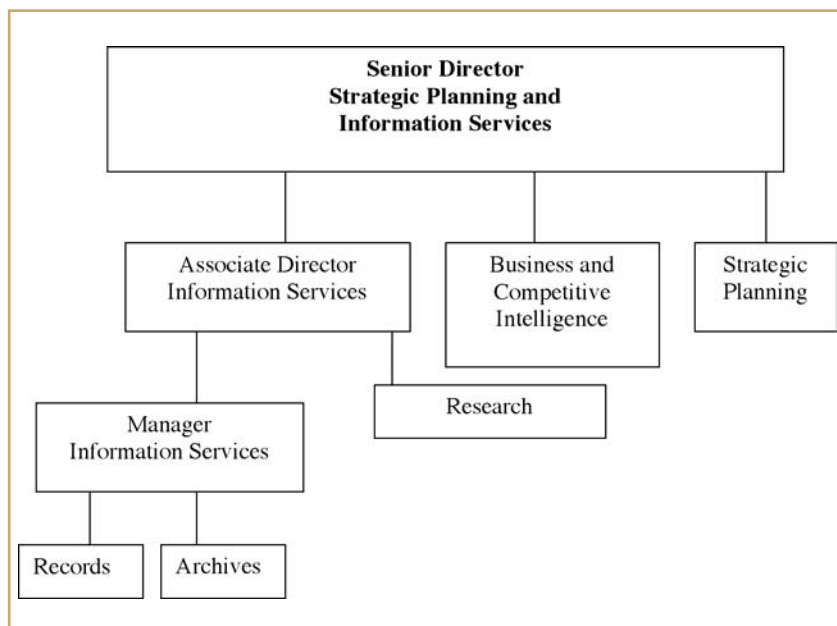
Records Management

As part of its records management (RM) activities, SP&IS is responsible for all issues related to records, including the management, organization, and availability of technical project files.

tion-wide retention schedules and for managing offsite storage, retrieval, and annual disposition of materials that have reached the end of their retention period. The records coordinator acts as an expert consultant for the records needs of the organization, offering advice on complex records management issues and providing understanding of retention policies.

The staff of this unit also work closely with the organization's legal counsel and communications office to ensure

Consumers Union/Consumer Report's Department Structure



These files, created from the testing program, contain a wide variety of materials, ranging from lab notebooks and spreadsheets with meticulously compiled data to purchase records for products tested and even, when appropriate, the packaging and containers of certain products. SP&IS is also responsible for research it carries out during the project and for editorial files, which explain the testing and put the test results into a format that consumers can use and understand.

The RM unit, which includes a full-time records coordinator and a part-time assistant, is also responsible for maintaining and updating organiza-

tion-wide retention schedules and for managing offsite storage, retrieval, and annual disposition of materials that have reached the end of their retention period. The records coordinator acts as an expert consultant for the records needs of the organization, offering advice on complex records management issues and providing understanding of retention policies.

Over the past few years, the RM unit has been monitoring innovation in electronic records management (ERM). During the current fiscal year (FY2005), senior management will work toward advancing the implementation of such a system. Currently, records are managed both in paper and electronic form through an internally built online system, but staff must request records in person. Part of the interest in e-records stems from the staff's ability to access

records from their desktops. While there will always be a need for a physical storage space, an investment in e-records will reduce management of paper records and, ultimately, long-term offsite storage costs, as well as make heavily used documents readily available to organization-wide staff from their workstations.

Also planned for the current fiscal year is an extensive department-by-department review of retention schedules, redesign of the intranet gateway for disseminating vital records information, including online records transmittal forms, and a streamlining of RM processes and procedures in preparation for an ERM rollout in 2006. The RM department manager has oversight of this activity.

Archives

The Archives of Consumers Union/*Consumer Reports* are among the richest in the United States on the consumer movement and its impact on American society. The archives are responsible for the stewardship of print, photo, and other materials that ensure the preservation of the organization's history. More than 50 books, theses, and dissertations have been written using the archives.

The archives serve many needs throughout the organization and are routinely accessed to answer questions related to the history of Consumers Union from internal (executive office, employee relations and communications, communications office, customer relations) and external clients in the press and academia. Questions posed often relate to the first time or last time products were tested, historical litigation, speeches made by key staff members, and even mentions of testing and advocacy activities of the organization in other publications over the years.

The archives have direct input into the selection of historical photographic materials related to promotional activities (annual calendars, brochures, and other materials) and for regular inclu-

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sion in Consumers Union's publications (e.g., *Consumer Reports*' "Then and Now" column, which contrasts current products and tests with those carried out in past years). Selected archival testing photographs are also available online at www.consumerreports.org.

Every quarter, the president and executive vice president of the organization host a lunch for new employees during which the archives' staff lead a slide presentation and discussion on the organization's history and the social climate in the 1920s and 1930s that led to the creation of Consumers Union. The history of the organization and the materials in the archives are further brought to life through display cases in the head office that feature a permanent exhibition of testing equipment throughout the years and rotating exhibitions on topics related to the consumer movement.

The archives also look outside the organization to bring the rich history of Consumers Union to a larger public. In 2002, for example, the archives worked with the San Francisco Airport Museum to present a series of testing photos in one of the museum's many exhibition spaces. Archival material has also contributed to two books.

The department manager has oversight of this area and also acts as archivist assisted by a part-time archives assistant and ad-hoc staff brought in for special projects.

Product-, Market-, and Consumer-focused Research

Providing broad-based product, market, and consumer research, the SP&IS category and industry analysts supply the tools and context for staff in the technical and editorial departments to carry out their testing and reporting activities.

Category analysts are primarily responsible for making the recommendations for products to be tested and for researching and reporting on the market context in their particular area. As such, these researchers – drawn from editorial, technical, and SP&IS departments – are part of five-member content development teams (CDTs) that participate in creating a testing and reporting program based on solid research and expertise in a given area. Every area written about online and in print has a team assigned to one or more of 17 categories, ranging from appliances to food to computers to autos. Each analyst is assigned to one or more categories and is part of the decision-making process for the direction of content development in that category. The analyst works closely with the product information department to create lists of products from which final recommendations for brand and model inclusions are drawn.

To gather the knowledge to make such recommendations, analysts stay current in their category by widely reading consumer and industry publi-

cations and attending trade shows and press conferences held by manufacturers when new products are released. They share that knowledge with their content teams and the wider Consumers Union audience through vehicles such as online daily or monthly alerts and market reports that are “pushed” and archived on the SP&IS intranet site.

As part of their mandate to help direct program development, category analysts also make recommendations related to such issues as scope of testing and seasonality of the testing and reporting program. For example, an analyst monitoring a given category could recommend re-examining the testing schedule based on such issues as sales spikes during given months, consumer buying patterns, or new model introductions. Because products are purchased by Consumers Union’s team of nationwide shoppers at retail outlets at the same time as they are made available to consumers, the timing of the testing is of vital importance.

To present all the data and information, analysts create extensive market reports or category landscapes that put products and markets into context. Along with the product recommendations, these reports help all staff involved in a project to understand such issues as the popularity of given products, trends in product design, purchasing trends, and market share and advertising expenditures for given products or categories.

The department’s category analysts work hand-in-hand with an SP&IS industry analyst to draw a complete picture of the area they are assigned to cover. The industry analyst’s role is primarily to create a broad context for a given area by reporting on the larger market and by documenting and understanding consumer-focused issues that drive the market and affect product and industry developments. For example, in addition to providing consumer information on given categories such as computers or televisions,

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an industry analyst assigned to electronics also would report on issues of convergence in the industry such as cell phones that function as personal digital assistants (PDAs) or cameras. The industry analyst also has a broad mandate to bring together research from across the organization from the survey and readership research departments and to place that data into the context of the industry and category. The result is a cohesive, well-managed pipeline of information that is balanced and placed into context to ensure that CDT members receive the latest, most targeted information and data related to their category and industry.

An additional and developing role for research analysts involves creating synergies between Consumers Union’s testing and advocacy activities. In the past year, for example, the industry analyst assigned to the health and food

categories has also worked closely with Consumer Union advocates across the country on specific food safety issues and related health implications. SP&IS, despite stressed resources, has managed to support the developing needs of the advocates either through direct research or by providing research tools and access to databases and print sources essential to advocacy work.

SP&IS currently has a total of 10 industry and category analysts with backgrounds in library and information science, business, marketing, and science. Based on such factors as skill, experience, interest, and workload in a given area, certain staff act as both category and industry analysts. This area is managed by the department’s associate director.

Business and Competitive Intelligence

The Business and Competitive Intelligence unit (B&CI) is responsible for monitoring business issues of concern to the organization and identifying opportunities for development of the organization’s mission and goals. As such, the unit monitors key partners and competitors in print and online and reports on new developments in consumer reporting.

The staff of this unit is also responsible for bringing issues to the attention of SP&IS analysts and for training them to understand how to include key competitive issues in their research to ensure completeness of the market landscape for given categories and industries.

This unit includes a senior researcher, who also handles research related to the publishing industry, as well as ad-hoc staff members assigned as necessary. The unit is managed by the senior director, who also carries out research and analysis in this area. The associate director regularly solicits input from this unit and is responsible for ensuring that it works closely with both the industry and category analysts to monitor competitive issues in their given areas.

Strategic Planning and Synergies

In 2004, the organization drafted a broad, far-reaching strategic plan intended to be a guide map for the next five years. The plan outlines the areas in which the organization can have the greatest impact and how it can best serve the needs of the U.S. consumer.

For the past few years, the former department known as the Information Center and now the new SP&IS department has created a place for itself at the center of research and information management at Consumers Union/*Consumer Reports*. Often the connecting force between other departments, SP&IS continues to build on its strengths and reputation as a department where solid research and information management provide the basis for decision-making. The department continues to make a place for itself and is more than ever directly involved in new organization-wide initiatives.

As the department forges ahead into its second year since the merger, synergies between areas within the department and throughout the organization continue to emerge. In addition to the new relationships and mandates already discussed, further examples of new and developing synergies abound. For example:

- The senior director of the department co-chairs a committee, the Future Investment Team, which weighs proposals for new projects or information products for the future growth of the organization. Decisions made by this committee are strongly influenced by research provided by the SP&IS department's analysts and the B&CI unit. The organization's strategic plan, created through SP&IS research and leadership, is also used as a yardstick to measure new initiatives.
- In addition to serving on an organization-wide Heritage Committee, which looks at ways to bring the rich history of the organization to the attention of the Consumers Union

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community, the associate director also serves on a cross-departmental team with a broad mandate of managing risk. This group addresses issues such as records management and retention.

- The category analysts in the department, who once worked almost in isolation, are being called upon to discuss and provide leadership in their content area and to consider issues of a more competitive and strategic nature when carrying out their work. Their close working rela-

tionship with the technical and editorial departments, SP&IS industry analysts, and the B&CI unit, as well as their work – as a team – of bringing together research from all areas of the organization, has improved dissemination of information and has focused overall research efforts.

The Role of the Information Manager

The importance of having an impact on an organization's business cannot be understated. While there is certainly a built-in protection to being a vital part of the process during tough times, the importance of being a part of that process goes beyond simply protecting departments or resources.

The role of the information professional continues to grow. Whether involved in records, archives, research, or a combination of these activities, information professionals have a place at the heart of organizations. They possess the skills and knowledge not only to help organizations understand the investment they make in information but also to help them best leverage the resources, both human and material, in which they are so heavily invested.

The volume of information continues to grow exponentially. As a result, the management and dissemination of that information has become increasingly difficult and complex. Information managers' mission – should they accept it – is to continue to actively position themselves as essential to the marshalling of information and knowledge resources. To do so, they need to be proactive and involved beyond the walls of their records rooms, archives rooms, and corporate research centers. ■

Kevin Manion is Associate Director in the Strategic Planning and Information Services Department at Consumer Reports and is responsible for research coordination and oversight, administering the corporate records program, and overseeing the archives. He is currently writing a book on the archives of Consumer Reports that will be published in fall 2005. He may be contacted at MANIKE@consumer.org.