



Paula Lederman, BSc, MLS, MBA, MIT, ERMm

Overview

Paula has over 15 years of consulting and training experience in the field of Content and Information Management in both the public and private sectors. She has extensive education and experience in a wide variety of systems including SharePoint, Opentext, and Documentum. She has been involved in several Taxonomy and Classification projects, as well as many Records and Electronic Records information management strategy, feasibility, and development projects. Her experience covers municipal, provincial/state, federal government agencies, the financial regulatory sector, and the private sector. She excels in implementing practical and user friendly solutions and for knowledge transfer during client project.

Strength in:

- Project management and project completion
- Communication with all levels of management and staff
- Ability to communicate complex concepts to lay people
- Records, archives and library management practice, theory and implementation strategies
- Ability to project accurate requirements, cost, time and competency
- Customer support, reference service, managing and motivating staff

Specialized in:

- strategic planning, workflow, business reengineering, imaging
- Information management, information content and organization, informat delivery, classification and taxonomy
- Practical application of technologies for records, archives, libraries
- Management of both physical and logical information components
- Access and retrieval functions

Many technologies including imaging, networking, internet, indexing, productivity tools

Significant Projects

Document Imaging and Content Management Projects



Conducted major feasibility study and backfile conversion RFP for the **Registrar General of Ontario** to create an electronic image data base of 20 million birth, marriage and death records.

Conducted numerous feasibility studies to review document imaging and conversion cost, and workflow re-engineering for the **Public Guardian and Trustee of Ontario, the Ontario Ministry of Culture Heritage and Archaeology Division.**

Conducted electronic information management readiness assessments for the **Ontario Ministry of Aboriginal Affairs, Ontario Ministry of Environment.**

Conducted shared file folder taxonomy development for **Ontario Ministry of Training and Universities.**



Feasibility and RFP development for document imaging for the Official Records of **Collier County, Florida.** System implemented in Laserfiche.



Establishment of electronic records management program for legal records and agreements for the Corporate Secretary of **Maple Leaf Foods** including contracts, deeds and closing books. Reconfigured storage space and used Opentext Livelink system for correspondence management and legal documents.

Taxonomy Projects



Developed a functional classification system for the Regional Municipality of Wood Buffalo (Fort MacMurray, Alberta) in preparation for integration with an Electronic Information Management System. Participated in the process mapping used to determine electronic records management requirements.



Developed an assessment of the application and use of specific taxonomies for **CIDA** and analyzed its applicability to all information assets. Assessed and tested performance of taxonomy for defined information resources including records, web content, research literature.



Developed a strategy to implement a knowledge management system and taxonomy for **Deloitte and Touche**, National Services, Canada, using SharePoint, across functions, industries, locations, consistent with global strategies, including change management, taxonomies, process, and implementation.



Developed requirements, implementation plan and user guidance for implementation of Taxonomy in Opentext Livelink for International Audit, Process Services, and Regulatory Compliance division of **Enbridge Gas, Canada.**



Developed an electronic records management strategy for the **City of Toronto** including all components of an electronic records management program, legal compliance issues and alignment issues with existing and proposed document management and information management initiatives. Included alignment with 311 services, IBM document management system, and existing classification and retention programs. Developed municipal wide functional classification

Electronic Records and Records Management Projects



Developed a roadmap for implementation of an Electronic Information Management system for a multi-national uranium mining company.



Developed a records management program for the Human Resources function of York University including an assessment, development of records classification and retention schedule, guidelines for use, user training and an implementation plan.



Developed records management program for **New York City Office of Emergency Management**, including classification, retention schedule, establishment of semi-active records program, hiring of records manager, implementation of Accutrac system, coordination of records during relocation to new premises.



Developed a records management program for the **Mutual Fund Dealers Association of Canada** for an electronic records repository that had existed in a Hummingbird Document Management System. Developed taxonomy, retention schedule, governance structure for records management and implementation plan. Participated on records implementation committee.



Participated in an intensive Value Assessment of the **New York City Department of Records and Archives** operations for the Office of Budget in developing a long term strategy for capital and operational expenditures. Issues included long term physical records storage with over 1 million cubic feet of records stored, retention schedules, staffing, Accutrac records management system, and archives operations.

Professional Experience

Lederman and Associates / IMERGE Consulting

Toronto, Canada 1984 -2007

Information Management Consultant

Completed over 100 projects in Records Management, Document Management, and Information Management for many Ministries of Ontario Government, Alberta Government, many agencies in New State, the Canadian Government, the City of New York, Enbridge Maple Leaf Foods, Canadian Space Agency, many libraries, manufacturing multinational firms and not-for-profit agencies. A full client list is available

City of Toronto, Toronto Public Library

Toronto, Canada 1981-1984

Director, Library Systems and Technologies

Involved automation of a network of 33 branch libraries including requirements analysis, a data conversion of 1.5 million title records, extensive staff training, RFP development and vendor selection, staff

recruiting and training and operational planning.

University of Toronto, Faculty of Library and Information Science

Toronto, Canada

Instructor

Taught courses at the Master's degree level in Data Base Management Systems, Systems Analysis for Library and Information Resources, Backfile Conversion, Taxonomy Creation and Implementation.

ISM, formerly UTLAS

Toronto, Canada

Programmer, Manager, End-User Consultant
Implementation.

Managed many of projects involving public and academic libraries which were in the process of utilizing the international bibliographic utility developed by UTLAS to share international standard cataloguing information including implementation of bilingual authority (vocabulary) management system and re-engineering of library workflow to take advantage of online information resources.

**Awards ,
Memberships
and
Certifications**

MIT

Master of Information Technology, 1999, Awarded by
Association of Information and Image Management(AIIM)

ERM^m

Electronic Records Management, Master (AIIM Certification)

MEMBERSHIPS:

- Association Of Information And Image Management
AIIM(Board Executive, and Past President (2003-4)
- Canadian Library Association
- ARMA

Education

MBA

Master of Business Administration, Toronto, York University, 1987.
Major in Finance and Strategic Planning.

MLS

Master of Library and Information Science, Faculty of Library and Information Science, University of Toronto, 1975. Majored in all aspects of information technology and records and library management.

BSc

Bachelor of Science, Computer Science, University of Toronto, 1973.
Major in data base design, data base structures, and information retrieval systems.

Publications and Seminars

Electronic Documents and Records Management at Microsoft Ontario Municipal CIO Summit, SharePoint Services, Toronto, March 2008.

Ensuring Your Organization Maintains a User-Friendly, Cost-Effective and Transparent Document Retention and Retrieval System at the Canadian Institute conference on E-Management and E-Discovery, Toronto, March 2008.

Innovative Approaches to Archiving Email, AIIM Annual Conference, Boston, April, 2007.

Implementing a Taxonomy, AIIM EDOC, March/April 2005

http://www.edocmagazine.com/archives_articles.asp?ID=29656

Several lectures and workshops in Backfile Conversion for New York State Records and Archives.

Several presentations to local AIIM, ARMA chapters on records management, backfile conversion, implementing taxonomies, electronic records management strategy, municipal records management programs.

**Projects Completed, to 2007:
Records Management, Classification, Retention, Taxonomy**

CLIENT	PROJECT
Aber Diamond Mines	Records Management Assessment, Design, Implementation
Addiction Research Foundation	Records management assessment
Archives of Ontario,	Assessment of Services to Provincial Government Agencies
Canadian International Development Agency	Assessment of Taxonomy for Information Respository
Cameco	Electronic Information Management Readiness Assessment
Cattaraugus County, New York	Requirements to reduce record storage centre, imaging feasibility
City of Brampton	Review of a records management program
Community Information Centres Of Ontario	Development of a Common Subject Authority
Curragh Resources Inc	Review of a records management program
Deloitte. (National Services)	Development of taxonomy for national and global knowledge management repository
Enbridge Gas	Implementation of Livelink Document Management System and Taxonomy Development
Huronia Historical Parks	Development of a common subject thesaurus
IKO	Records program for multinational roof materials manufacturer
Ministry of Agriculture	File classification and document management strategy
Ministry of Citizenship and Immigration	Taxonomy for Immigration Ontario Portal
Ministry of Energy	Development of a subject thesaurus
Ministry of Government Services, Real Estate Division	Development of a records management system
Ministry of Attorney General, Peel County Court	Assessment to Integrate records of five courts into new courthouse
Ministry of Environment	Comprehensive records management review
Ministry of Environment Industrial Abatement	Province wide conversion of files to geographic coding system and Creation of data base
Municipal World Inc	Index to current and retrospective publications
Metropolitan Toronto Archives	Records and archives system study
Mutual Fund Dealers Association of Canada	Development of classification and retention for document imaging repository, Hummingbird
Nestle Canada	Knowledge management for engineering documents
New York, Office of Budget Management	Value assessment for the department of records and information Services
Northwater Financial	Knowledge management assessment, taxonomy, file conversion
Ontario Forest Industries Association	Records management practices
Ontario Hydro	Study on Records Centre Storage Facilities
Ontario Insurance Commission	Development of records management strategies and standards
Ontario Medical Association	Review of current records management program
Ontario Securities Commission	Development of a common file plan for project and electronic files
Parkdale Community Health Centre	Development of a classification and file conversion
Regional Municipality of Wood Buffalo	Development of functional classification.
Rosen and Associates, Forensic Accountants	Coordinate and design new file system for relocation
Saffer Advertising Agency	Review and implementation of an information resource strategy
Sandoz Canada Inc.	Review of a records management program
Schaeffer Engineering	Records management plan and classification for civil engineering documents, plans, electronic records, email
SYDA Foundation	Establishment of a records management program
Technical Standards Safety Association (TSSA)	Classification and records strategy for an electronic and document management system
Toronto Star Newspaper Ltd.	Analysis of picture storage, retrieval and naming conventions
Town of Milton	Classification, retention, training for records management program

Town of Newmarket	Records management assessment, classification, retention, training
York University, Human Resources and Labor Relations	Records management program, file plan and retention schedule

Projects Completed, to 2007: Document Management, Electronic Records Management

CLIENT	PROJECT
Buffalo District School Board, NY	Document management needs assessment
Canadian Hearing Society	Information management strategy
Canadian Space Agency, PQ	Development of electronic information management strategy
City of Toronto	Computer needs analysis for records management system
City of Kitchener	Needs assessment and requirements for records management system
Collier County Courthouse, Florida	Electronic storage and retrieval of Collier County official records
Community Information Centre of Toronto	Automation requirements for thesaurus, index
Environment Canada, Trans-boundary Movement Division	Data management analysis, electronic records management
Erie County Water Authority, NY	Feasibility study to image purchasing, payroll and easement Documents
Gloversville Police, NY	Needs assessment for imaging of arrest records
Information and Privacy Commissioner of Ontario	Design, development and implementation of a document management System
Maple Leaf Foods Canada Ltd.	Document management strategy, Opentext/Livelink
Ministry of Consumer and Commercial Relations, Office of the Registrar General of Ontario	Feasibility study, automated imaging of vital records, workflow re-engineering, document conversion requirements for 17 million Documents
Ministry of Culture and Heritage	Imaging of archival research reports, document conversion, linking to portal
Niagara Frontier Transportation Authority, NAFTA, NY	Business process analysis for document imaging
New York State Records and Archives Administration	Workshops on document imaging conversions held in three regions of State
Office of the Public Guardian and Trustee of Ontario	Document management strategy, integration strategy with financial Systems
Premier's Office, Government of Ontario	Document imaging of Premier's correspondence replacement system
Tonawanda School Board, NY	Document imaging feasibility of student records
Town of Evans, NY	Document imaging feasibility for property assessment records
West Seneca, NY	Imaging feasibility for council minutes and vital records
Wyoming County, NY	Document management requirements, needs assessment for inactive Storage