

LISA MARIE DAULBY

FORMAL EDUCATION

PhD, Faculty of Information, University of Toronto
(in progress, good academic standing)

Master of Arts, Archival Studies/History, University of Windsor

Bachelor of Arts, History/Women's Studies, University of Toronto

PROFESSIONAL INDUSTRY ACCREDITATIONS

Certified Records Manager (CRM) from The Institute of Certified Records Managers™ (ICRM) (in progress)

Certified Electronic Records Management Master (ERMm) from The Association of Information and Image Management (AIIM)

EMPLOYMENT EXPERIENCE

2002 – Present

**Manager, Enterprise Records and Information Management
Royal Bank of Canada (RBC), Toronto, Ontario**

- Enhance consistency and document mandatory requirements in record-keeping and information management practices by researching, developing and maintaining a comprehensive enterprise wide policy framework that directs the strategic and operational activities of RBC's records and information management program.
- Participate as a policy stakeholder on the review of all Enterprise Content Management, Privacy and Information Risk policies, standards and guidelines.
- Evaluate the records and information management program's performance by setting benchmarks and monitoring emerging industry best practises and trends.
- Develop enterprise records retention policies and schedules in cooperation with law group.
- Support the implementation of the retention schedule throughout the organization by providing expert advice, analysis and guidance on all records and information retention inquiries.
- Represent RBC by participating on industry joint inter-bank records and information management committee.
- Establish records and information management

methodologies for the management of information assets in electronic and digital form.

- Collaborate with IT to develop and establish objectives and implement records management requirements during the operation, maintenance and closeout phases of the information management systems/repositories.
- Develop education and training modules for the application of the records and information management program.
- Enhance awareness and understanding of records and information management objectives by providing advisory services as a records and information management subject matter expert (SME).
- Strengthen collaborative relationships by participating in cross-enterprise functional project working teams.
- Communicate with key stakeholders to proactively ensure organizational understanding of the interrelationship of records and business processes.
- Provide metrics and key performance indicators that measure the productivity and performance of the records and information management program.
- Document e-discovery requests and partner with law in the administration of suspension orders (legal hold orders) and assist legal counsel in assembling and producing litigation documentation in a timely manner.
- Develop and monitor records search and retrieval naming conventions, thesauri, taxonomies, controlled vocabularies and metadata schemes.
- Perform risk management and compliance assessments to identify and address potential liabilities and mitigate risks relating to corporate record assets.
- Advise on the consolidation and integration of physical records during all corporate mergers and acquisitions.
- Define functional requirements and participate in the selection and implementation of content management, imaging and workflow software, technologies and tools.
- Partner with corporate communications in developing an ongoing communication and outreach strategy to achieve awareness of the records and information management program as well as new initiatives, procedures, tools and systems.
- Liaise with the disaster preparedness and business continuity program management team to define the accountabilities for the identification and protection of vital records required for the continuity of operations in the event of loss following a business interruption.
- Participate in continuing education, research, networking and

professional and industry organizations to develop, maintain and advance competencies.

1997 – 2002

Archivist (Corporate)

Manulife Financial, Toronto, Ontario

- Provide responsive, cost-effective and comprehensive research services to internal partners and external clients.
- Develop corporate information management policies, standards, and guidelines that correlate to industry standards.
- Interface with internal clients/departments in order to guide, direct instruct and provide them with information and library resources necessary to meet their project needs and business goals.
- Assist in the acquisition and accessioning of incoming permanent due diligence corporate records.
- Appraise and identified records of evidential, intrinsic and informational value.
- Process and catalogue collections according to established schedule of priorities, deadlines and production goals.
- Arrange and described textual materials, sound recordings, moving images and graphic images according to proscribed cataloguing rules.
- Act as an advisor to special corporate historical projects.
- Ensure the appropriate housing and care for documents of historical value for future access and use.
- Co-ordinate the content of the corporate intranet and facilitate the on going evolution of site.
- Liaise and communicate with external third party contractors, service providers and vendors.
- Prepare marketing and outreach activities specific to the corporate archives research program.
- Identify and implement required specialized archival/library database systems changes or enhancements.
- Supervise, motivate and train contract staff and students.
- Plan, research, and coordinate sponsored exhibits/displays.
- Provide outreach through staff and student orientation tours.

TEACHING ASSIGNMENTS

2007 – Present

Course Instructor

George Brown College, Business Skills and Management Program (Records Management / Archival Practises), Toronto, Ontario

- Instructor for Archives Level I and II.
- Direct and facilitate seminars, lectures and meetings.
- Perform student assignments, test and evaluations.
- Chaired group discussions.
- Supervised students working on research papers.
- Counseled students on their academic progress.

2002 – 2007

PhD Teaching Assistant

University of Toronto, Toronto, Ontario

- Teaching assistant for Research Methods, Introduction to Records Management/Archives, Managing Electronic Records, Information Professional Practicum and Business Information Resources.
- Direct and facilitate student seminars, lectures and meeting.
- Perform student evaluations.
- Present special lectures in area of research and expertise.

PUBLICATIONS & PRESENTATIONS

Daulby, L. (2009). Electronic Records Management in Practise. Paper presented at the Faculty of Information, University of Toronto, Toronto, Ontario.

Daulby, L. (2008). Information Management Policies in Practise. Paper presented at the Faculty of Information, University of Toronto, Toronto, Ontario.

Daulby, L. (2006). Book Review of *Preserving Digital Material* by Ross Harvey. *Archivaria*, 62 (Fall), 215-218.

Daulby, L. (2005). Electronic records management and policy: managing organizational records. Paper presented at the Faculty of Information Studies, University of Toronto, Toronto, Ontario.

Daulby, L. (2005). What do archivists do and why? archival description and appraisal. Paper presented at the Faculty of Information Studies, University of Toronto, Toronto, Ontario

Daulby, L. (2004). The intersection of information management policy and privacy & access to information within the Government of Canada. Paper presented at the Archives Association of Ontario Conference, Kingston, Ontario.

Daulby, L. (2004). Historical development of Canadian Government information legislation and policies. Paper presented at the Society

of American Archivists Conference, Boston, Massachusetts.

Daulby, L. (2003). Uncorking the past: the role of the corporate archives in support of the law department. Paper presented at the Annual Canadian Association of Law Librarians Conference, Niagara, Ontario.

Daulby, L. (2003). What do archivists do and why? archival description and preservation. Paper presented at the Faculty of Information Studies, University of Toronto, Toronto, Ontario.

PROFESSIONAL AFFILIATION AND MEMBERSHIP

Member of good standing of the following professional organizations:

- Association of Information Management Professionals (ARMA)
- Association of Information and Image Management (AIIM)
- Records Management Society (RMS) of Great Britain
- Records Management Association of Australia (RMAA)
- Association of Library & Information Science Education (ALISE)
- Society of American Archivists (SAA)
- Society of Archivists (SoA) UK
- Association of Canadian Archivists (ACA)
- Archives Association of Ontario (AAO)
- Toronto Area Archivist Group (TAAG)