

2017 Fall

## WHAT'S INSIDE?

From the President .....	1
CRM Leadership Roster .....	2
Secretary-Treasurer Report.....	3
Code of Ethics "Refresh" .....	3
Surviving Henry and Lessons Learned .....	4
Spotlight on ICRM Legislation and Appeals .....	5
Advancing from RIM to IG – Beyond your Project Plan.....	6
Member in the Spotlight.....	7
Newsletter Editorship Changes Hands .....	7
New CRMs and CRAs .....	8

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## FROM THE PRESIDENT....

**President, Wendy McLain, CRM**

*Fellow ICRM members:*

The ARMA International Conference in Orlando was a whirlwind of professional activity, learning, and reconnecting! The ICRM conducted a successful Exam Prep Seminar, Fall Board Meeting, Annual Business Meeting, Reception, and Information Booth in the Expo Hall. We also announced the Election results for the 2018 Board. Please join me in congratulating Cheryl Pederson, President-Elect, Ellie Maier, Secretary-Treasurer, Laurie Carpenter, REAG, and Paula Sutton, RLA.

Can you believe it is already November? Each year November serves as my annual reminder to focus on thankfulness. Giving thanks every day can be challenging, especially when we get distracted by the negative aspects of daily living. Some days it seems the only thing I can think of to be thankful for is coffee in my favorite mug. Put into the context of my service to the ICRM though, I have lots to be thankful for this year. Here are a few of the things that made my list:

- Our volunteers – Board, Committees, Graders, and Members who give their time and talents to further the ICRM mission.
- Our partners – Associations, Educational Institutions, and Vendors who seek creative ways to work together for the betterment of each party and our profession as a whole.



- Our innovation – New ideas for increasing our relevance within the government sector as well as opportunities to improve our processes and technology.
- Our numbers – Membership continues to grow, while we keep dues steady and the bottom line healthy.
- Our gifts – Monetary gifts to La ARMA Nostra are great a way to “pay it forward” to ICRM candidates pursuing CRM or CRA credentials. The gift of mentorship ensures that our candidates receive support to succeed with the exams and ultimately in the field of RIM.
- Our relationships – At the close of the Annual Business Meeting, I invited everyone to enjoy food, drink, and conversation at the reception aka ICRM family reunion. Maybe this is the thing I’m most thankful for; the respect and admiration we have for each other as friends and colleagues.

Those are just a few reasons why I am thankful to be part of the ICRM. If you are wondering where you fit into this amazing group of professionals, and are looking for an opportunity to be more involved in your Institute, contact the Administrative office and we will find a role for you.

# ICRM LEADERSHIP ROSTER

## **ICRM Board of Regents**

### **Chair**

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## ICRM SECRETARY-TREASURER REPORT

*Ellie Maier, CRM, CBCP*

As the 2018 Secretary-Treasurer, I look forward to learning all I can about the ICRM and keeping track of key meetings, ideas, and other areas within the ICRM that we may be able to change and improve, as needed. I would also like to contribute any writing projects, including the emerging WIKI and articles, as I have time.

**My goals for the year serving as the ICRM Secretary-Treasurer are to:**

1. Manage and coordinate written and oral communications for the board;
2. Arrange for Board Meetings and record activities of the Institute;
3. Maintain appropriate records and financial reports; and
4. Manage ICRM committees as directed by the ICRM

My background is varied but here are a few snippets from my past and future endeavors in the industry. As a 28-year veteran in the Records and Information Management/Governance (RIM) and Business Continuity/Disaster Recovery (BC) industries, I provide organizations with the ability to develop RIM strategies, deploy project plans,

provide program and procedural documentation, and support methods of implementation with logistics and guidance for her areas of expertise. In my present position as the Corporate Records Manager for CITGO Petroleum Corporation for the past nine years, I direct enterprise-wide RIM Program initiatives for more than 4,000 employees and contractors to practice compliance for enterprise-wide governance of all data, documents, records and information. In addition to being a Certified Records Manager, I also am a Certified Business Continuity Professional, hold a Change Management certification from Prosci®, and have a SharePoint® for Records Management Certificate. I am bilingual in Dutch, my native country, and partially fluent in Spanish. Over the years, I have published several articles, presented at local and international venues. In 2007, I received the Britt Literary Award from the Association of Records Managers and Administrators (ARMA International), and the 2016 Alan Andolsen Award from the Institute of Certified Records Managers (ICRM). I currently serve as the ICRM Committee Manager for the Houston ARMA Chapter, and lead CRM workshops, discussions and study groups.

### ICRM CODE OF ETHICS

Certified Records Managers should maintain high professional standards of conduct in the performance of their duties. The Code of Ethics is provided as a guide to professional conduct.

1. Certified Records Managers have a professional responsibility to conduct themselves so that their good faith and integrity shall not be open to question. They will promote the highest possible records management standards.
2. Certified Records Managers shall conform to existing laws and regulations covering the creation, maintenance, and disposition of recorded information, and shall never knowingly be parties to any illegal or improper activities relative thereto.
3. Certified Records Managers shall be prudent in the use of information acquired in the course of their duties. They should protect confidential, proprietary and trade secret information obtained from others and use it only for the purposes approved by the party

from whom it was obtained or for the benefit of that party, and not for the personal gain of anyone else.

4. Certified Records Managers shall not accept gifts or gratuities from clients, business associates, or suppliers as inducements to influence any procurements or decisions they may make.
5. Certified Records Managers shall use all reasonable care to obtain factual evidence to support their opinion.
6. Certified Records Managers shall strive for continuing proficiency and effectiveness in their profession and shall contribute to further research, development, and education. It is their professional responsibility to encourage those interested in records management and offer assistance whenever possible to those who enter the profession and to those already in the profession.

## SURVIVING HARVEY AND LESSONS LEARNED

By Ellie Maier, CRM

When you are a nervous Nelly as I am, it always helps to be prepared in many aspects, not just for our personal lives but also at work. Every one of these tips have saved me in the past from living, or rather camping out in my apartment 9 years ago during Hurricane Ike in Houston, with 11 days of no power and 3 days of no water.

**1. Fill one bathtub and sinks full of water.** Even if you have water, if you lose power, the next thing to go is usually water. The last thing a friend of mine told me who was leaving town was that. I could not figure out for the life of me why but I did do it. That bathtub water was the way to wash dishes and myself once I lost water pressure from the city for 3 days. Eventually I also added buckets out on the porch to gather rainwater. It worked for me so to this day and during emergencies, I fill my tubs and sinks with water. While we are on the topic of water and even if you don't like drinking it...

**2. Carry one case of bottled water in your car and have 2 in your house, more if you have family members and pets.** I even do this in the winter. It's a no brainer for me since the minute you need to buy that stuff, so does everyone else and as you know, that and bread is the first thing off the shelves.

**3. Have ice trays in your freezer, even if you have an icemaker.** If you have power, you can make ice. Ice is the other thing non-existent in the stores, so make your own. Then invest in a cooler with more than one wall in case you need it and you have to keep things cool. Which of course leads me to one of my fav subjects, food :)

**4. Cook when you can to continue to use your own fresh food.** I am writing a cookbook and I find cooking is like meditating for me. I get to pretty much forget what is happening and produce a nice meal. Cooking is much easier than what people say it is. I know, some just do not like cooking, but trust me, unless you want to eat out of cans and bags for the foreseeable future, it is easy and fast to fry an egg, bacon and hash browns. Throw in some fruit and you have Vitamin C. Part of the balance is keeping what you need on hand for future meals but also cooking what you can so you don't end up with a fridge full of food, in case the power goes out.

**5. Keep canned and packaged food for two weeks for one person, more for a family.** While this is not my preferred way of eating, I just finished a thing of Campbell's chunky potpie soup that I was able to heat in the microwave. It had protein in it, I had some crackers and a ginger ale to stay fueled. I did my shopping of canned goods at the beginning of hurricane season. This pays off because I do not have to go to the store now as I have it all on hand. You can now

find all sorts of canned and packaged food that is for Foodies, organic and healthy choices as well. If you can invest in a small propane camping stove and you do lose power, you can at least still boil some water or grill some food. Have 4 small refills available in your disaster recovery tub of supplies. And always have a couple of manual can openers on hand, again think camping at home without power....

**6. If you are sheltered in place, take a minute to go outside for a breather.** Most folks will go stir crazy being in their home days on end. Add to this that you are probably watching the news and weather channel non-stop and hearing sirens go off all the time and working from home for the office. I even saw a Coast Guard helicopter fly by. I am working to stay busy but sometimes, I go outside, when not torrential rains and storms, just to take a break. From time to time, I also mute the TV so that you are not inundated with how bad things are. I go outside, just to take a break and have a change of scenery. I have walked around my apartment complex to stretch, get some fresh air and just walk away for a bit. If any debris has gathered, I am not going to wait around for maintenance to deal with this, I do it myself. Like many others, I feel grateful and guilty that I can't do more during a situation of crisis, so besides this, I have also advertised that my apartment can be a shelter for my friends who are flooded and lost their homes. By doing something physically, like putting the trash in the garbage chute that others are leaving for maintenance to deal with, I feel like I am doing something else besides watching what is going on and staying busy.

**7. Keep all devices plugged in at all times.** Thank goodness for all the technology tools we have. However, once the power goes, well, it is just a matter of time until you lose charge. Have besides wall unit also the portable kind available and then flashlights, lanterns, even emergency candles available. Also, stage your DR supplies in strategic areas. Group like items together. It is good to have an emergency backpack that you can purchase from DR sites that is portable for your car. A first aid kit with flashlight should be permanently stashed in your car.

**8. Stay hydrated and fed.** Having a hot cup of water with lemon squeezed in will do more to hydrate you than Gatorade. While beer and alcohol are also more supplies to go right away in the stores, it is good to have a clear, calm head to deal with these situations. Other ways to relax is by guided meditation apps like "Headspace" which I love and my trusty music "Spa Channel". Have snacks on hand so that your blood sugar levels stay constant. Drink more fluids than you think you need also to help your body manage the stress created by those elevated cortisol levels.



## SURVIVING HARVEY AND LESSONS LEARNED -CONTINUED FROM PAGE 4

**9. Count your blessings.** This one is big in terms of looking at the glass half-full rather than half-empty. Extend a helping hand whenever you can. And most of all stay connected with loved ones and friends. This city of Houston is dear to me for many reasons but mostly because people have that southern charm and help folks rather than ignoring one another. Even by writing down what to be grateful for, instantly shifts your mood to a more hopeful state.

**10. Keep a running list of lessons learned.** Keeping lists, in whatever format (paper and/or electronic), is a great way to dump out your brain, remember and continue to learn what works, what doesn't. Something as simple as a diary will work well. You can combine lists or keep them separate, whatever works for you. I can say that while I write this for work, later I will write in my diary for my own personal needs. I find writing soothing and helps me to get things off my mind and put in a place where I can review them later, learn more and then make better decisions on how to prepare for the unthinkable.

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Ellie Maier is the Corporate Records Manager for CITGO Petroleum Corporation. She has been in the field for 29 years, is a presenter, and has published various articles. In 2007, she received the "Britt Literary Award" from ARMA International for her article "ISO17799 – Standard for Security". She is a Certified Records Manager, Certified Business Continuity Professional and holds a Change Management Certification from PROSCI®. She currently serves as the ICRM Committee Manager for the Houston ARMA Chapter and leads CRM workshops, discussions, and study groups. She received the "Alan Andolsen" ICRM Mentor of the Year award in 2016.

## SPOTLIGHT ON ICRM LEGISLATION AND APPEALS

*Paula Sutton, CRM, IGP - Regent, Legislation and Appeals*

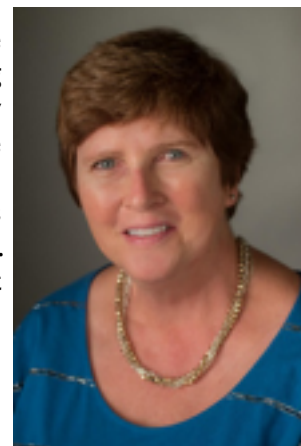
I am thrilled for the opportunity to serve as the ICRM Regent of Legislation and Appeals for a second term! The Board has accomplished many exciting initiatives and I look forward to continuing the great work we have completed during my first term.

During the past year my work has included convening the Appeals Committee to deliberate ten reviews, provided review for various governance questions, updated the Code of Ethics, and increased the transparency of the ICRM Board by establishing a standardize format and tracking system for Policies and Procedures. I also serve as chair of the Website Update Committee which reviews all updates to the website to insure we are conveying a consistent message. I was also lucky enough to be on the Board of Regents when the new CRA certification was rolled out to the public last year. This is a great addition to the ICRM organization and allows us to meet the ever-changing needs of the RIM profession. I would like to see the ICRM continue to look at opportunities to provide more value to current members and explore new opportunities to further our partnerships and marketing efforts. We have a great product. We need to continue on the path of providing a great product and member opportunities.

Another exciting initiative I have been involved with is expanding the Mentoring Program (currently only for Part 6). We are in the process of developing a program to roll out mentoring for Parts 1-6 for the ICRM exam in 2018. Stay tuned!! This is an excellent volunteer opportunity as we will be needing more mentors.

What else is on the horizon for 2018? Update of the ICRM Records Retention Schedule, Non-Disclosure Agreement and Bylaws, with other projects sure to surface as we start the new year. It is a busy time for the Board of Regents!

Thank you for the opportunity to serve as Regent, Legislation and Appeals of the ICRM for a second term. My enthusiasm, drive, and energy has been said to be contagious. I hope I can continue to spread this enthusiasm, drive, and energy to others.



# ADVANCING FROM RIM TO IG – BEYOND YOUR PROJECT PLAN

Karen S Knight, CCEP

Your information governance (IG) *business case* was accepted.



- ⇒ Your *problem statement* was compelling, citing *rationale* that struck a chord with the leadership review panel.
- ⇒ The project *sponsors* you enlisted became active members of the IG Program's Council.
- ⇒ AND, your *project plan* remains current and informed. It details short and long-term goals; tactics; dependencies and assumptions; resources and timelines, all adjusted, as needed.

So – why is this critical transformation from records and information management (RIM) such a struggle? The need for IG is obvious... right?

It's obvious to you. For mostly everyone else, however, it's just one more change - and who needs that? Advancing to IG challenges your organization's culture, with its values and norms. It competes with other priorities, and to some, it looks like "empire-building". Does any of this sound familiar? What can you do to re-energize your IG Program implementation?



## THE CULTURE DYNAMIC

*Culture eats strategy* – just ask Peter Drucker.

Culture is powerful. Culture matters a great deal to successful and sustainable outcomes. The recognition and care of culture comes first – and last – it must be thoughtful and on-going.

As part of your IG Program pitch, your business case documented *pros and cons*. Was culture listed as a potential implementation risk? Did you identify those aspects of your organization's culture that will contribute to the program's success, differentiating them from those aspects certain to be disruptive?

**A process can assist you with these analyses.**

- ⇒ **Recognize**
- ⇒ **Describe**
- ⇒ **Comprehend**
- ⇒ **Manage**
- ⇒ **Succeed**

First and foremost, concede that culture is an implementation factor. Next, reflect on your organization's culture, defining it by type and its characteristics. Is your organization's culture best described as *collaborative*? Or, is creativity its mantra? Perhaps your organization's culture is all about control, where certainty, order and standardization are valued most. Or is competence, with continuous improvement emphasized? Often an organization's culture can be a blend of the four types. In addition, departments, units or teams within an organization can exhibit their own culture types. It is critical to understand those as well.

If culture really does eat strategy, then feed it. Accept that your organization's culture will have an impact on the progress of your IG Program. Understand the culture - manage to it, through it, or around it.

Your knowledge of your organization's culture can inform your implementation planning and efforts. Leverage the many beneficial aspects of your organization's culture type.

- A *collaborative* culture will engender cooperation; it will facilitate mutual interests.
- A *creative* culture welcomes change and new ideas.
- A *culture* of competence will enthusiastically support the improvements that IG brings.
- A *control-oriented* culture will embrace the stability and regulation instituted by an IG Program.

Clearly, culture can benefit your IG Program implementation - those aspects are the *pros*. By contrast, regardless of their *label*, *risks*, *cons*, *rate limiters*, are the factors that hinder or halt implementation progress. In your organization, they may include:

- Fiercely-defended authority or responsibilities
- Business unit independence (siloes environment)
- Aversion to change
- A mindset limited by entrenched tradition or legacy
- "Turf battle" inclinations

Organizational culture recognition and management is a critical success factor for your IG Program implementation. Perhaps, in your organization, over time, your implementation will polish a few of its culture's rough edges - and amplify its many positive attributes.

**Karen S Knight, CCEP, Principal Consultant**  
Cohasset Associates, November 2017

About Karen S. Knight, CCEP

Ms. Knight is a Principal Consultant with Cohasset Associates. Her experience as a Chief Compliance Officer for over 20 years informs her consulting engagements. Ms. Knight's design of compliant and sustainable Information Governance Programs includes governance policies and standards, legal hold processes, retention schedules, training and education, and technology enablers. Mitigating the regulatory and legal risks of governing information, Ms. Knight integrates and aligns records management and information governance disciplines, addressing privacy, information security, ethics and compliance, contract and procurement, and data breach prevention. She is a white paper author, and a frequent speaker and workshop leader on these and many other information-related topics.

## MEMBER IN THE SPOTLIGHT

This issue's Member in the Spotlight is Sarah L. Lohmeyer, CRM. Sarah was born in St. Louis but, her heart lies in New York City where she takes every opportunity to visit. Sarah still lives and works in the Midwest where she is a Records Manager for a telecommunications company.

While in school Sarah studied Communications and graduated from the University of Missouri-Columbia. Go Tigers! She writes, "After graduation I worked for a health insurance company, then I took a deep dive into the pharmaceutical industry, where I stayed for ten years. Now I work in telecommunications. It continues to fascinate me how differently companies manage their critical business records but, with the same sense of importance and urgency in the long run."

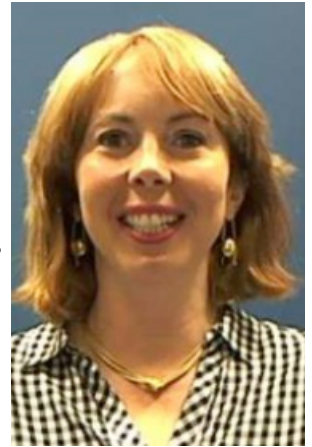
Like many others in our field, Sarah has benefitted from having a mentor in her career. Sarah says, "My most important mentor has been Karen Schmitz, an IT Project Manager, who taught me and trusted me enough to be her back-up system administrator for IT systems where we worked previously. Those experiences taught me not to be afraid of trial and error along with knowing the difference between a need and a want in electronic records management."

Another important mentor that Sarah had told her about

the CRM designation. "Gail Keefe, whom I knew as a Records Supervisor, was a blessing and a curse for me. She told me about this thing called a CRM designation. I was eager to complete the process; however, taking and passing six tests was not easy. I am so happy that the ICRM will now have mentors for all six parts." Sarah is very happy to have her CRM though. "It has opened so many doors for me.

More and more companies now know and understand the value of employees having a CRM. Thinking back to the times I was pouring over information during the study process really challenged my views on records management and has made me a better records manager because of it."

Looking ahead for 2018, Sarah is assuming additional duties to her work in records management, as she will become the next Editor of the ICRM Newsletter. She is looking forward to working with the ICRM Board and welcomes any and all input from our membership.



## NEWSLETTER EDITORSHIP CHANGES HANDS

Linda Buss, CRM

I am pleased to announce that starting with the winter 2018 issue of *ProfessioNotes*, Sarah Lohmeyer will assume the ICRM newsletter's editor position. During my time as editor, I have seen a number of individuals pass through the Board of Directors, and it has been a delight to work with them. It is time for the next generation to be involved in the furthering of our profession. My life has been enriched by those with whom I have worked, and I have made many new friends in the ICRM. I am eager to see how the newsletter changes as those with enhanced skills and abilities step up to mentor the ICRM community. My thanks especially to Ellie Maier who always had an article ready for publication; Margo Note who reached out to me last year to offer regular articles on project management; Howard Loos, the ICRM Mentor Coordinator, who has great advice for mentors; Nick De Laurentis, the Regents, Applicant and Member Relations, who manages the La ARMA Nostra fund to provide financial support for CRM/CRA candidates attaining their certification; Vicki Pratt for her fun and educational articles; the many Board Members who have contributed news items,

provided input to articles (and much needed correction!), and generally helped promote the ICRM; the many CRMs and CRAs who have been the Member in the Spotlight; and you members who have offered articles throughout my term as editor. I want to also recognize Stephen Grandin and Meghan McGrath from Capitol Hill Management who have worked patiently with me as the intermediary between the members and the management organization during the past four plus years.

It is a team effort to produce the newsletter, and each of you has contributed to making it a success each quarter. Best wishes to Sarah as she assumes this vital role in the ICRM.

## New CRMs

from the August  
Testing Cycle

**Stacie Barclay**  
Victoria, BC

**Angela Burns**  
Calgary, AB

**Teri Crawford**  
Toledo, OH

**Frank Fazzio III**  
Boise, ID

**Katherine Huit**  
Mcminnville, OR

**Millicent Jordan**  
Forest Hill, MD

**Lauren Kelly**  
Portland, OR

**Emily Speight**  
Red Deer, AB

## New CRAs

the August Testing Cycle

**Keith Adams**  
Washington, DC

**Abigail Austin**  
South Holland, IL

**Carrie Brooks**  
Sparks, NV

**Jessica Burgess**  
Charlottesville, VA

**Jose Cardoza**  
Los Angeles, CA

**Jennifer Chadband**  
Boise, ID

**Joy Faerber**  
Pullman, WA

**Deborah Gantt**  
Columbus, OH

**Howard Kuppler**  
Aurora, IL

**Matthew Logie**  
Reston, VA

**Cora Lowe**  
Bridgetown, Barbados

**Jennifer Martin**  
Bothell, WA

**Julie McKeon**  
Quincy, MA

**L'Cena Parsons**  
Trenton, TX

**Claire, Reuschel**  
Arlington, VA

**Kathy Rosinski**  
Oshkosh, WI

**Roger Rutkowski**  
Atlanta, GA

**Danna Schacter**  
Los Angeles, CA

**Sarah Sherwood**  
Chelsea, MI

**Richard Surber**  
Boise, ID

**Ossie Thomas**  
Collierville, TN

**Penelope Turner**  
Grand Haven, MI

**Jeanel Walker**  
Austin, TX

**Graham Weigand**  
Houston, TX

**Molly Wittenberg**  
Bloomington, IN



# Your information is **priceless.**



**Unauthorized access to or loss of your documents  
and records can ruin your company.**

## **So why risk it?**

You don't have to—when you're searching for a company to help you with offsite records management and storage, make sure you see the Privacy+ logo.

## **What does it mean to be Privacy+ Certified?**

This certification program was built using recognized industry laws and standards like HIPAA, PCI DSS, GLBA, SOX and the European Data Protection Directive. Those who are certified have proven that they have the appropriate security measures and operational controls in place to maintain information privacy for their clients.

This kind of security should simply be **expected**.

**Look for It.  
Ask for It.  
Expect It.**

To find a list of Privacy+ Certified companies and to learn more,  
visit **[www.prismintl.org](http://www.prismintl.org)**.

### **ICRM NEWSLETTER DEADLINES**

Deadlines for submitting articles for the ICRM newsletter are November 1, February 1, May 1 and August 1. Please email your news items to:  
[newslettereditor@icrm.org](mailto:newslettereditor@icrm.org).  
All items must be in MS Word or MS Excel format.  
Photographs may be in .jpg or .tif format.

### **ATTENTION CRMs & CRAs**

**Certification Maintenance Cycle:** Remember, in order to maintain your designation, you must earn 100 credits every five years. Log onto the ICRM database to keep track of when the cycle ends and your total maintenance points. **Six Month Rule:** You must apply for Certification Maintenance within 6 months of the activity.



It is your **life**. It is your **career**. It is your **certification**.

# CRM

**In a business world of doing “more with less,”** your designation as a Certified Records Manager shows that you understand the many facets of the RIM profession.

**In a business world that is rapidly changing,** your designation as a Certified Records Manager shows you are up to date on the latest technology, the latest rules and regulations, and the techniques of the RIM profession.

**In a business world in which new jobs are increasingly competitive,** your designation as a Certified Records Manager (CRM) demonstrates that you have the experience and expertise to lead change and deploy best practices as they evolve in the RIM profession.

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