



# ProfessionNotes

Institute of Certified Records Managers  
[www.ICRM.org](http://www.ICRM.org)

Spring 2019

## What's Inside?

From the President.....	1
ICRM Leadership Roster .....	2
ICRM Newsletter Editor Report.....	3
Legislation and Appeals .....	3
Applicant & Member Relations .....	4
Part 6 Mentoring Chair .....	4
Member in the Spotlight.....	5
New CRM's/CRA's Lists .....	6

## How to Contact the Institute of Certified Records Managers (ICRM)

**Mailing Address:**  
ICRM  
230 Washington Avenue,  
Suite 101  
Albany, NY 12203

**Phone and Website:**  
(877) 244-3128  
*Toll-free USA and Canada*

**Alternate Tel:**  
(518) 694-5362  
Fax: (518) 463-8656

**Website:** [www.icrm.org](http://www.icrm.org)  
**E-mail:** [admin@icrm.org](mailto:admin@icrm.org)

## From the President....

**President, Cheryl Pederson, CRM**

*Fellow Members of ICRM,*

This past year, 2018, has been one of the best in ICRM history. With John Krysa leading the charge, we have accomplished an extraordinary amount of work and have made great progress into our future. We have had a great year and we will all reap the benefits of the work of the ICRM Board of Regents, the ICRM Committees and the many, many volunteers who work every day to make an impact for the ICRM and the records management community.

I hope to continue with the advancement of the work we have accomplished to date during my presidency. What I do realize though, is that it is not just one person. It is a community of people working together to make a difference in our industry. Beyond that, it is our strategic partners that we work with who provide both quality and relevant education. It is the increase of awareness of records and information management through support of the Institute of Certified Records Managers along with the passionate love of our mission to practice in our chosen field. I see a very bright future for ICRM and for CRMs, CRAs, and for the FED and NS specialty designations and for any other designation(s) that we may add in the future.

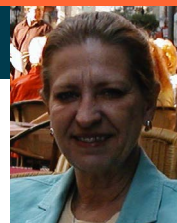
You most likely have received a notice that our ICRM software is changing very soon. Through the work of Brice Sample, ICRM Business Manager, John Krysa, ICRM Chair, and Meghan McGrath, ICRM Administrator, the ICRM has purchased a new software package called Prolydian that will accomplish nearly everything that we need for better administration, testing, candidate tracking, and membership management for the ICRM. Every Regent has been responsible for testing the new software, along with approximately 20 testers chosen from working committees and a few from the general membership. We have budgeted for this over time and this software purchase will not affect your yearly membership dues. The ICRM Board intends to keep everyone informed as the roll-out progresses.

I want to let you know that I have been Board liaison to the ICRM Marketing Committee for the last year so I have first-hand knowledge that they are a phenomenal group of hardworking individuals (as are all of the ICRM Committee members). They have gotten our name out in many different ways and most recently you may have noticed the ICRM on Facebook, Twitter and LinkedIn. They have also advertised with the Society of American Archivists (SAA) in the *In the Loop* newsletter as well as IG World Magazine. Just recently, we have signed an agreement to advertise ICRM on the IG GURU website. These are all very exciting developments for ICRM thanks to our Marketing Committee!

In addition, we have added a new Committee to the ICRM called the Examination Prep Committee (EPC). The EPC consists of four CRMs that spent many hours reviewing the Prep Product prior to it being presented in Anaheim this past year. Although there were kinks to work out, it was a very valuable process that we will continue into the future to make sure that what we are presenting to candidates is clear and concise.

Our new Regents to the ICRM Board are Pat Burns, Les Bossert and Caroline Walters. Pat was elected Regent, Applicant and Member Relations replacing Nick DeLaurentis. Les was appointed to fill the position of Regent, Legislation and Appeals vacated by Paula Sutton due to her election as President-Elect. Caroline was appointed to fill the role of Regent, Examination Development and was subsequently elected to that position this year. We all look forward to working with Pat, Les and Caroline this year.

Thank you to all of you for your support. I look forward to a rewarding year in 2019.



# ICRM Leadership Roster

## ICRM Board of Regents

### Chairman

John Krysa, CRM  
Executive Consultant  
Millican & Associates, Inc.  
5850 Coral Ridge Drive, Suite 205  
Coral Springs, FL 33076-3379  
e-mail: president@icrm.org

### President

Cheryl Pederson, CRM  
Tel: 952-913-0460  
e-mail: president-elect@icrm.org

### President-Elect

Paula Sutton, CRM, IGP  
Email: president-elect@icrm.org

### Secretary-Treasurer

Ellie Maier, CRM, CBCP  
Corporate Records Manager  
CITGO Petroleum Corporation  
1293 Eldridge Parkway  
Houston, TX 77077  
Tel: 832-486-4066  
e-mail:  
secretary-treasurer@icrm.org

### Regent, Examination Development

Caroline J. Walters, CRM  
University of Virginia  
Box 400898  
Charlottesville, VA 22904  
Tel: 434-243-9162  
Email:  
exam-development@icrm.org

### Regent, Examination Administration and Grading

Laurie Carpenter, CRM, IGP  
611 N. Brand Blvd.  
Glendale, CA 91203  
Tel. 818-553-7466  
e-mail: examadmin@icrm.org

### Regent, Applicant and Member Relations

Patricia Burns, CRM  
105 Charters Settlement Road  
Charters Settlement  
NB CANADA E3C 1Y5  
e-mail:  
certification-standards@icrm.org

### Regent, Legislation and Appeals

Les Bossert, CRM  
MDU Utilities Group  
400 N 4th Street  
Bismarck, ND 58501  
701-222-7842  
e-mail:  
legislation-appeals@icrm.org

## Committee Chairs

### Part 6 Mentor Coordinator

Deb Gerhardt  
e-mail: mentor@icrm.org

### Examination Preparation Committee

Lucy Rieger, Chair

### Newsletter Editor

Sarah L. Lohmeyer, CRM  
Email: newsletter-editor@icrm.org

### Webmaster

Glenn Gercken  
e-mail: webmaster@icrm.org

### Marketing Committee Coordinator

Katie Voldal, MPS, CRM, IGP  
Sidley Austin, LLP  
1501 K Street, NW  
Washington, DC 20005  
Tel. 202-736-8233  
e-mail: kvoldal@sidley.com

### Strategic Alliance Committee

Rae Lynn Haliday, CRM  
Saint Louis Zoo  
1 Government Drive  
St. Louis, MO 63110  
Tel: 314-646-4572  
e-mail:  
strategic-committee-chair@icrm.org

*Permission to reprint articles from ProfessioNotes is given with credit to the author and the ICRM.*

## ICRM Newsletter Editor Report



**Sarah L. Lohmeyer, CRM**

*Fellow ICRM members:*

This is our first newsletter of 2019. The day is overcast as I write this but, I think most of our areas may be starting to thaw out as I've already seen crocuses in bloom. The ICRM is certainly springing forward with new initiatives such as the roll-out of our much anticipated software solution and the creation of the new Examination Prep Committee. In this issue, the focus is on our members who are serving in new leadership positions within the ICRM this year. I think you will all agree that the quality and level

of experience of those who volunteer to serve on our Board and our Committees are first-class. Many still have full-time jobs in records management and information governance while some have already retired from long careers in our field. Fortunately for us, all are willing to share their wealth of knowledge and we are grateful for their time commitments to the ICRM. I wish them much success in their roles this year.

The next issue of the newsletter is coming at the end of June. I am always on the lookout for interesting articles pertaining to records management and information governance. If you would like to be a contributor or have any questions about the newsletter, please contact me at [newsletter-editor@icrm.org](mailto:newsletter-editor@icrm.org).

## Legislation and Appeals

The ICRM has a new Regent, Legislation and Appeals. Les Bossert, CRM, has agreed to replace Paula Sutton as our new Regent in this area. Paula has taken a new role within the ICRM as our President-Elect. Les has worked in records management for over 37 years and has a deep understanding of the day to day challenges that we all face. He started as a collegiate member of ARMA over 40 years ago and graduated from the University of North Dakota with a B.A./B.S. in Business Management with an accreditation in Records Management. This was a unique degree many years ago and fortunately for all of us, we have many more potential records managers receiving training utilizing a formalized curriculum.

As the Corporate Records Manager for MDU Resources Group, Inc., a multi-dimensional natural resources corporation consisting of over 120 different companies operating in 48 different States, Les is based out of the MDU Utilities Group, an electric and national gas company headquartered in Bismarck, North Dakota. Les' days are never dull. The MDU Utilities Group is comprised of four Utility companies (MDU, GPNG, IGC and CNG) serving over 1.1 million customers in 8 states. Les is responsible for thousands of cubic feet of records both onsite and off, and terabytes of digital and electronic records in various repositories. North Dakota's membership in the ICRM continues to grow and Les is proud to be the 3rd person from the state to become a full-fledged CRM.

Les was appointed to be Regent, Legislation and Appeals by ICRM President Cheryl Pederson. Having worked on past initiatives and committees with Cheryl and Paula Sutton prior to his appointment, there has been a smooth transition into his new role as Regent. He looks forward to his new task ahead which will be providing oversight of the Legislation and Appeals processes of the ICRM.

Lastly, records management will always remain near and dear to him but, family means everything to Les. He is the proud single dad of two sons but, he gets the most pleasure from being around his two grandkids, 3 year-old Aubrey and 8 month-old Dylan. Les wants everyone to know he is an ardent advocate for adoption as this brought little Aubrey into his family's life. If it isn't obvious enough, Les loves the state of North Dakota. He wants everyone to know that while he's a proud to be a North Dakota Fighting Hawk, he will always remain a Fighting Sioux at heart.



## Applicant & Member Relations



### **Patricia A. Burns, CRM**

The ICRM has a new Regent, Applicant and Member Relations. Patricia A. Burns, CRM, has been elected to this role and replaces Nick DeLaurentis. Most of us know her as Pat though through her 43 years of working in records management. She lives and works in New Brunswick, Canada. Pat has been a member of ARMA since 1977 and joined the ICRM in 2004. She has always been an active member of the ARMA New Brunswick Chapter and is looking forward to her new role with the ICRM.

Currently, Pat is on contract with Crown Corporation for Electric Power (NB Power). Her focus is to help the corporation's move towards digital transformation and to put good governance in place for the management of information. She is working on implementing a functional enterprise classification plan for the corporation and is heavily involved in its' transition to Office 365.

Pat sat for the CRM examination in 2003 at the age of 49. She had a wonderful mentor, Roslyn Chambers, who also lived in New Brunswick and was taking the examination at the same time. Unfortunately, they both lived in separate cities and would have to send their practice essays back and forth to each other to critique and compare

notes. Pat remembers passing all of her exams the first time, except for Part 5, which she missed by two marks. She understands that continues to be a problem for many. Her advice is to keep going!

Pat has two great anecdotes from her career:

*One that stands out was when I was in the middle of taking records off the shelf with my team and I was down on my knees, when our newly elected Premier (the equivalent to a State Governor) came in to be introduced. Not the easiest to get up quickly, I put my hand out for him to help me, and he did. The other time, in my management years, I was presenting the program to my senior management team. I was prepped by my director that I had 20 minutes and if they were engaged, I might be able to spend all 20 minutes with them and if they had no flavor to the proposal I would be quickly excused. Well 2 hours and 20 minutes later I was still in there and they apologized to me that they would like to continue this, but they had an appointment with the Premier and would I come back? Needless to say that was the start of a very successful records and information program.*

The ICRM is indeed fortunate to have Pat as a Regent this term.

## Part 6 Mentoring Chair

We are happy to welcome Debra Gearhart, CRM, FAI as the new Part 6 Mentoring Chair. Deb is currently a professor in Records Management at Wayne State University in Detroit, Michigan. She retired in June 2010 from the State of Michigan as the Director of Records Management Services.

Deb is a longtime ARMA member and has served her local chapter in all capacities and has been selected Chapter Member of the Year in 1985, 1989, and 1998. She served ARMA International as Region II Vice President in 1990-92, on the Education Development Committee, ARMA's Awards Committee, and the International Conference Program Committee. She received the prestigious Company of Fellows award from ARMA in 1993.

Deb received her CRM designation in 1988 and has been actively involved in the ICRM. Her current and past roles include:

- President-Elect, President, and Chair for the ICRM Board of Regents

- ICRM Board Regent, Exam Development
- Exam Development Committee
- Parts 1-5, and 6 writer for the Exam Development Committee
- Part 6 Speaker for the ARMA Conference
- Pre-con and Post-con developer and speaker since 2009
- Part 6 grader
- 2015 Alan Andolsen Mentor of the Year Award Recipient



Most of all, she truly enjoys helping candidates so they have a better opportunity to both study and prepare themselves to take Part 6 of the exam. Welcome Deb to your new role!

## Member in the Spotlight



**This issue's Member in the Spotlight is Blake E. Richardson, CRM.** Blake was born in Nashville, Tennessee and lives in Surprise, Arizona. He has a Bachelor of Business Administration (BBA) degree and majored in Accounting. Like many of us, managing records and information did not cross his mind until he entered the workforce and was surrounded by data and information. Since then, he has never looked back and his career focus has remained on records management for the past 22 years.

Blake characterizes his career in the records and information management profession as being a knowledgeable RIM diplomat. As a young Records Manager, he struggled with why other employees did not share his passion for the RIM field. It occurred to him after several years that most employees considered records management a necessary but tedious chore. Practicing good records management is put aside to focus on other daily work. In Blake's mind, the key is in showing its' value. As Blake says, "If you want employees to manage records and information, show them what is in it for them and their departments; show them how quality records management can be beneficial to finding what they need when they need it." He puts this in practice every day as a Corporate Records Manager for a rapidly expanding company operating in 47 states.

Earning the CRM designation has been extremely beneficial for Blake. A large aspect of his job involves discussing all-RIM related matters with all levels of his organization from executives to new employees. It adds credibility because it's a well-known designation that is challenging to earn. It has made the difference for him in being selected by organizations to become their Corporate Records Manager or Information Governance Manager.

While Blake has a day job he is also an accomplished writer. Perhaps you recognized him as the author of *Records Management for Dummies* and *Records and Information Management For Dummies 2.0*. He is definitely not a person who wastes any moment of his day.

Over the years, Blake has been active member of the ICRM. He is a former member of the Legislative and Appeals Committee and was an Examination Development Committee Part 6 writer for 5 years. Blake has also volunteered his time to be a grader for Part 6 exams. He strongly encourages CRM candidates to find a mentor, or group and take advantage of the ICRM preparation classes and seminars.



## New CRMs

as of JANUARY 2019

**Aimee Dyjur**  
Edmonton, AB  
**Alexis Marlett**  
Pittsburgh, PA  
**Allison Matos**  
Plainview, NY  
**Anita S Kinney**  
Falls Church, VA  
**Cora E. Lowe**  
St. Andrew, Bridgetown  
**Dominic Zuccherro**  
Downers Grove, IL  
**Gil Brueckner**  
Wilmington, NC  
**Howard Kuppler**  
Aurora, IL  
**Janelle Kowalchuk**  
Calgary, AB  
**Jeff Chalut**  
Atlantic Beach, FL  
**John Jensen**  
Minneapolis, MN  
**Julie C Torres**  
Sparks, NV  
**Michael Bond**  
Wellington, FL  
**Molly A. Wittenberg**  
Bloomington, IN  
**Paula F. Lederman**  
Toronto, ON  
**Philanthi Routzounis Koslowski**  
Roswell, GA  
**Shukra R Kichambare**  
Columbus, IN  
**Stacie T. Carpenter**  
Miami, FL  
**Timothy T. O'Toole**  
Casselberry, FL

## New CRAs

as of JANUARY 2019

**Adrienne Shaffer**  
Wellington, FL  
**Alexis Marlett**  
Pittsburgh, PA  
**Allan Thompson**  
Sherwood Park, AB  
**Amanda Sinden-Free**  
Buffalo, NY  
**Andina Whaley**  
Henderson, NV  
**Brad Houston**  
Milwaukee, WI  
**Bruce Wirth**  
Olympia, WA  
**David Nitin Alex**  
Dubai  
**Donna Rubio**  
Waveland, MS  
**Emily Antoville**  
Woodmere, NY  
**Greg Buchanan**  
Lakewood, CO  
**James Smith**  
Temecula, CA  
**Jason L. Sweitzer**  
Raleigh, NC  
**Jeanie Atwell**  
Dallas, TX  
**Jennifer Bolden**  
Houston, TX  
**Jennifer Davis**  
Grove City, OH  
**Jennifer Morris**  
Wilkes Barre, PA  
**John A Jensen**  
Minneapolis, MN  
**John Leary**  
Chester, VA  
**Kathleen Clark**  
Lynnwood, WA  
**Katriina Timm**  
Anchorage, AK  
**Larry D Weir**  
Everett, WA  
**Laura Vincent**  
Katy, TX  
**Maria Ribar**  
Forest Hills, NY  
**Matthew Kunkle**  
Killeen, TX  
**Megan Cipolla**  
Bellevue, WA  
**Melessa Cox**  
Louisville, KY  
**Olga Kanevskyi**  
Calgary, AB  
**Richard A Wisser**  
Orange Park, FL  
**Sarah Brathwaite**  
Oshawa, ON  
**Shelly Smith**  
Winnipeg, MB  
**Shukra R Kichambare**  
Columbus, IN  
**Tanna Roadhouse**  
Irving, TX

## 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.



# SIMPLIFY YOUR WORKFLOWS

## Access is a proud 2018-2019 Business Partner of ICRM.

We offer comprehensive physical and digital solutions for your document management needs, including secure chain of custody and data protection practices, imaging, destruction services, physical storage and digital document workflow software.



PHYSICAL RECORDS MANAGEMENT | DIGITAL DOCUMENT MANAGEMENT | SECURE SHREDDING

☎ 1.877.345.3546

🌐 [AccessCorp.com](http://AccessCorp.com)

## SUSTAINABLE & ADAPTABLE RECORDS MANAGEMENT

We are professional but creative.

We are curious problem solvers.

We have a can-do mindset.

We are fun and positive.

We are collaborative, pragmatic, and approachable.

**We are Access Sciences.**

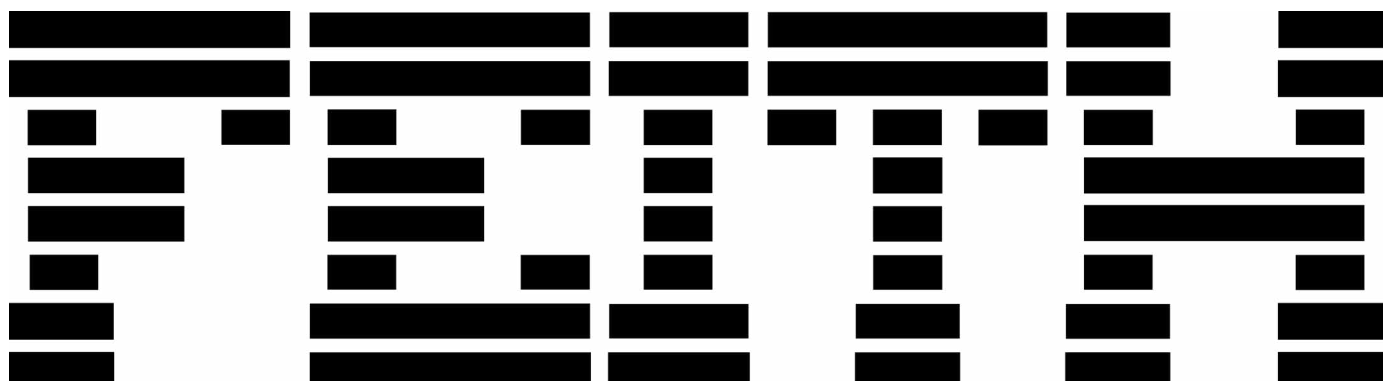


**800.242.2005 | [info@AccessSciences.com](mailto:info@AccessSciences.com)**  
**[AccessSciences.com](http://AccessSciences.com)**

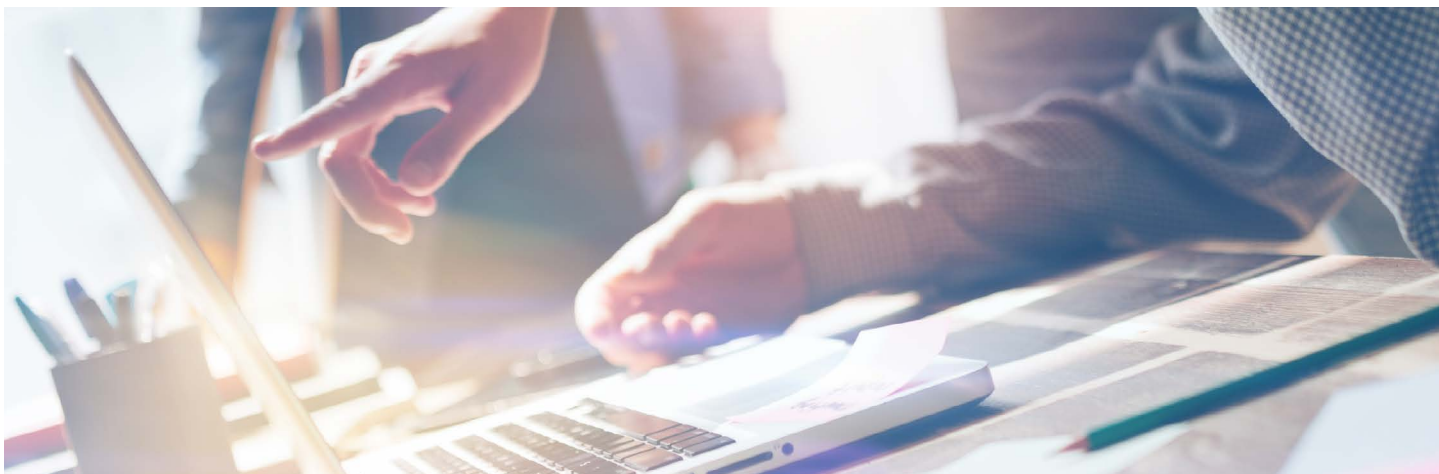


# ARMA: Honoring the Past, Embracing the Present, Shaping the Future

ARMA Houston Chapter 2018 -2019







# CRM&CRA

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

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

**In a business world in which new jobs are increasingly competitive,** your designation as a Certified Records Manager or Certified Records Analyst shows that you have the experience and expertise that others may lack, and skills to show that you are a leader in the RM profession.

For more information about becoming a  
Certified Records Manager or Certified Records  
Analyst contact (518) 463-8644 or visit [www.icrm.org](http://www.icrm.org)

