# 40 ICRM

Institute of Certified Records Managers

# ProfessioNotes

INSTITUTE OF CERTIFIED RECORDS MANAGERS   WWW.ICRM.ORG

2015 FALL

## WHAT'S INSIDE....

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## FROM THE PRESIDENT...

The ICRM Board of Regents met for the fall Board Meeting on October 3-4, 2015 prior to the start of the annual ARMA International Conference hosted at the Gaylord National Convention Center in Washington, D.C. As part of the Board Meeting the ICRM Requirements for Strategic Alliances as well as a formal resolution were approved.  The minutes of the meeting along with the approved documents have been posted on the ICRM website under Governance.

The Annual Reception was a great success with 230 attendees.  Cheryl Pederson put together a 200-slide presentation with lots of information covering the history of the ICRM and plenty of great photos of CRMs and other stakeholders.  Paul Wester, former Chief Records Officer for the National Archives and Records Administration (NARA), joined us to celebrate the Institute's 40th Anniversary where he was presented with an honorary CRM. We are very appreciative that Paul was able to attend this milestone event with us as well as many of the CRMs who have been significant contributors

*President Rae Lynn Haliday, CRM*

along our 40 year journey.  Thanks again to all of those who helped sponsor the Annual Reception (Access Sciences, Huron Consulting Group and Records Management University) and to all who worked hard to make it a success.

The Board of Regents reported some progressive accomplishments this year.  The formation of key partnerships in the academic field are underway that will help us expand our reach in both the areas of developing pipelines for candidates and new offerings for exam prep that provide online access.  As we observe ARMA's 60th anniversary we celebrate our long his-

## CONGRATULATIONS ELECTION WINNERS

**Wendy McLain, CRM**
**President Elect**

**William LeFevre, CRM**
**Secretary-Treasurer**

**Paula Sutton, CRM, IGP**
**Regent — Legislation & Appeals**

**Laurie Carpenter, CRM, IGP**
**Regent — Exam Adminstration & Grading**

# ICRM LEADERSHIP ROSTER

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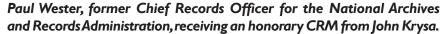Steven J. Golden, CRM
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# SCENES FROM THE ICRM 40TH ANNIVERSARY RECEPTION









*Paul Wester, former Chief Records Officer for the National Archives and Records Administration, receiving an honorary CRM from John Krysa.*

# THANK YOU TO ANNIVERSARY RECEPTION SPONSORS

The ICRM wishes to thank our three sponsors for their generous contributions to make the 40th anniversary reception a success. Please join us in recognizing the continuing support of our sponsors.

**Access Sciences**, presenting Modus™ which allows you to get the records retention schedule you need to meet your organization's regulatory requirements without months of research and hidden costs.

**Huron Consulting Group** which provides innovative and creative solutions for today's increasingly complex legal, technical and operational information management challenges for organizations of all sizes and industries.

**Records Management University**, which is a free live educational, informational, and fun continuing-expertise online RIM & IG course, discussing the latest news, innovations, expert advice, best practices, and new technology in RM today, for everyone from novice to expert to you.

## UPCOMING EXAMINATION SCHEDULE

| Winter 2016 | Summer 2016 |
|---|---|
| Registration Open: Nov. 20-Jan. 28 | Registration Open May 20-July 28 |
| Exam Dates ......... Feb. 1-12 | Exam Dates ......... August 1-12 |
| Spring 2016 | Fall 2016 |
| Registration Open Feb. 19-April 28 | Registration Open: Aug. 19-Nov. 3 |
| Exam Dates ......... May 2-13 | Exam Dates ......... November 7-18 |

## ICRM VISION

The Institute of Certified Records Managers ® (ICRM) is the certifying body for Records and Information Management (RIM) professionals, recognized and valued by employers and RIM practitioners world-wide

# SCENES FROM ICRM BUSINESS MEETING





Nick De Laurentis

(Above), from left, Sharon LaPlant, Rae Lynn Haliday, Nick De Laurentis, Rayanne Waggoner, Brice Sample, Wendy McLain and Cheryl Pederson

(Right), from left, John Krysa, Wendy McLain, Brice Sample and Rayanne Waggoner



## ICRM PRE-APPROVED CMP ACTIVITIES

| Date | Title | Type | Credits | Sponsor | Site |
|------|-------|------|---------|---------|------|
| 12/8 | Practical Roadmap for RMA Success: A Deep Examination | A | 1.00 | Records Management University at Feith | Webinar |
| 12/9 | Records Management, Information Governance & You: RIM & IG Education for Law Firm Administrators | A | 1.00 | New York City Chapter of the Association of Legal Administrators | New York, NY |
| 12/15-12/16 | Cybersecure | A | 12.00 | ALM | New York, NY |
| 12/22 | RMA's Role in the Information Lifecycle Management Paradigm | A | 1.00 | Records Management University at Feith | Webinar |
| 1/11 | What You Need to Know About Idaho Public Records and Open Meetings | A | 1.50 | Lorman | Webinar |
| 1/15 | Appraisal of Electronic Records | A | 5.50 | Society of American Archivists | Corvallis, OR |
| 1/26 | Digital Curation: Fundamentals for Success | A | 6.50 | Society of American Archivists | New York, NY |
| 2/6 | ECRM Pioneer Breakfast Club | A | 1.50 | Gimmal | Houston, TX |

# CRM Exam Under Construction Again

**By Sharon LaPlant, CRM**
**Regent for Examination Development**

The contents of the CRM exam have been quite stable since it was first developed. However, in response to new technologies and ideologies it is time to bring the exam up to date to test candidates for their knowledge of current practices. The Exam Development Committee is looking at parts 2 and 3 for review and update to reflect current RIM topics and how they impact an organization. Topics in part 2 such as Forms Management, Correspondence Management, and Mail Distribution are being retired and will be replaced with more contemporary material. Part 3 will focus more on current record storage options and practices with less emphasis on physical record storage facilities. The new outline will be introduced in early 2016, and the new exam will be rolled out in 2017.

The ICRM is also developing a new test bank that will be more automated and dynamic, giving us the ability to engage the CRM community in developing test material and offer additional support to our candidates. In 2016, you will be able to submit business cases to be considered for the exam. CMPs will be awarded for each submission, with additional CMPs granted if your business case is accepted as a Part 6 exam. We are also exploring the possibility of giving you the opportunity to submit questions for Parts 1 – 5 for consideration.

The new test bank will offer additional study options for candidates as well. A current list of acronyms used within the test, along with their definitions, will be available to candidates. We will also have a more concise list of resources. One of the best features will be our ability to show candidates who fail an exam the outline parts on which they did poorly and the resources they should study. This is the first time we will be able to make that direct link for our candidates.

The updated technology will also provide feedback to the Exam Development Committee on the candidates. We will learn more about demographics of the candidate such as industry, length of time to take the exam, and their role in their organization. Comparing how each question tested with the demographics of the candidates will help us improve the overall test material.

Watch future newsletters for announcements as these enhancements are implemented.

# The Candidate Coach: Part 6 Mentoring

**By Howard Loos, CRM**
**ICRM Mentor Coordinator**

We received a record number of Mentor requests during the 2015 exam cycle. Many thanks to those who stepped up and offered guidance to these candidates. Performing this service enables mentors to receive three ICRM maintenance credits for each mentoring assignment. If you are serving as a mentor and have not yet registered with the ICRM Mentor Coordinator, please do so by sending an email to mentor@icrm.org. Registering is a simple but necessary step for earning credits. When emailing the mentor coordinator, please include your candidate's name, email address and in which exam cycle your candidate plans to take the Part 6 exam.

For those of you who would like to serve as a mentor, please send an email to the ICRM Mentor Coordinator expressing your desire to serve. The following questions and answers should help inform your decision about serving as a mentor:

What is my time commitment and duties as a mentor?

· Most mentors spend a total of two to four hours working with their assigned candidate over a one or two month period of time

· The main duties of the mentor are to answer questions related to the examination process and then to provide feedback on one or two practice exams completed by the candidate. Most communication is done via email

What resources are available to help me?

· ICRM Exam Preparation Resources are available online at http://www.icrm.org/exam-preparation-resources/. The webpage also includes a link to a Part 6 Sample Business Case (practice exam) as well as strategies for passing the exams.

· Practice exams with answer guides – each year, the ICRM retires a few exams. One or more of these exams are given to candidates who participate in the mentoring program. The grader's instructions are provided to the mentor to assist in the practice exam feedback process. When you are assigned as a mentor you will receive any available practice exams.

· Part 6 study guide – This study guide is designed to give guidance to both mentors and candidates. You will receive this study guide during your mentor assignment.

# ICRM AWARDS 6 LA ARMA NOSTRA SCHOLARSHIPS

*By Nicholas J. De Laurentis, CRM, IGP*
*ICRM Regent, Applicant and Member Relations and Founder of La ARMA Nostra*

On August 18th, the Institute of Certified Records Managers (ICRM) announced the availability of six La ARMA Nostra scholarships administered through the ARMA International Educational Foundation (AIEF). The funding for these awards is an endowment established in partnership with the AIEF through the collective efforts of La ARMA Nostra members to which all active ICRM Board members and other records professionals donate annually.

These scholarships were a one-time award of $500 each for individuals who have successfully completed or are actively pursuing of their Certified Records Manager (CRM) certification, Information Governance Professional (IGP) certification, or other related records and information management (RIM)/ information governance (IG) certification.

Three awards were presented in remembrance of Jeffrey Baldwin, CRM, and three will be presented in remembrance of Komal Gulich, CRM, IGP. Jeffrey and Komal, long-time champions of the RIM/IG profession and the CRM certification, passed away from cancer in 2014.

These awards were available to individuals in all geographic locations; however, weight was given to applicants from ARMA's Great Lakes Region. These awards were also available to anyone who is actively pursuing or has obtained a professional RIM certification; however, weight was given to those obtaining/pursuing their CRM over other certifications.

Applications were submitted for the successful completion of any part (e.g., CRM Part I has been passed successfully) so long as the applicant is still actively pursuing the designation (candidate in good standing) and completion of part or all of the certification occurred after January 1, 2014. Thirteen applications were received for the six available reimbursement awards.

On October 1, 2015, the following 2015 La ARMA Nostra RIM/IG Certification Reimbursement Awards were selected and presented to the recipients prior to the ARMA Conference in Washington, D.C. Five winners are currently pursuing their CRM certification with the sixth recipient attaining her CRM earlier this year.

**Jeffrey Baldwin, CRM Memorial Reimbursement Awards** to:
1. Joshua Bullough (pursuing CRM, Pacific Region)
2. Linnea Knapp (pursuing CRM, Great Lakes Region)
3. Sofia Scalzitti (pursuing CRM, Great Lakes Region)

**Komal Gulich, CRM, IGP Memorial Reimbursement Awards** to:
1. Jeanne Callen (pursuing CRM, Great Lakes Region)
2. Trudi Crumpwright, CRM (Canadian Region)
3. Andrew San Agustin (pursuing CRM, Great Northwest Region)

These reimbursement awards were the first of their kind for La ARMA Nostra, with three annual graduate-level scholarships awarded in the amount $3,000 each in 2011, 2012, and 2013. For more information on available scholarships please visit: www.armaedfoundation.org.

## EDITORIAL POLICY

Authors' statements, either fact or opinion, are their own and do not express the official policy of the ICRM. While the advice and information in this newsletter are believed to be true and accurate at the time of publication, neither the authors nor the editor can accept any legal responsibility for errors or omissions. The ICRM makes no warranty expressed or implied with respect to the material contained herein.

Letters to the Editor are welcome. Letters must be signed and are subject to editing.

## ICRM NEWSLETTER DEADLINES

Deadlines for submitting articles for the ICRM newsletter are November 1, February 1, May 1 and August1.

Please email your news items to newsletter-editor@icrm.org. All items must be in MS Word or MS Excel format. Photographs may be in .jpg or .tif format.

# PRESIDENT

tory together and are actively building bridges to new partnership opportunities. We thank ARMA for the tremendous support it provides to us during the fall meeting and in hosting the Designation Academy.

The ICRM is currently developing a new Partner Page on the ICRM website. Please look for information in the near future that will include a list of strategic alliances as well as details on events and opportunities as they are formalized and reportable. The Board of Regents gave individual reports on their role-specific initiatives and strategic partnerships where they took a lead. For those of you who were unable to attend the ICRM business meeting please see the Business Meeting PowerPoint presentation posted on the ICRM website under Governance.

This is my final President's Message. I want to thank all of the members for putting your confidence in me to lead the Institute in conjunction with an outstanding Board of Regents. It has been extremely rewarding and truly an honor to serve such a great organization and to work with so many amazing people. As a reminder the ICRM election is underway; please cast your votes!

Best regards,

Rae Lynn Haliday, CRM
President
Institute of Certified Records Managers

## ATTENTION CRMs

**Certification Maintenance Cycle:** Remember, in order to maintain the CRM 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 six months of the activity.

## ICRM MISSION

To certify RIM professionals as Certified Records Managers ® (CRM) and administer a certification maintenance program

# 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.

# ALAN ANDOLSON MENTOR AWARD PRESENTED TO DEBBIE GEARHART

This year's Alan Andolson Mentor of the Year Award was presented to Deborah Gearhart.

Debbie Gearhart obtained her CRM in July 1988. By the spring of 1989 she was asked to present an ARMA Conference general session entitled "CRM Exam Part 6, Case Studies" and continued to do so for 10 years.

In 2001, Debbie joined the ICRM Exam Development Committee. She wrote test questions for Part 6. She eventually became Regent for Exam Development from 2003 to 2008. One of the first items on Debbie's agenda was to revise the CRM Examination handbook.

In about 2004 she was asked by the Orange County ARMA Chapter to present at the CRM Prep Seminar. This seminar assisted numerous candidates, or anyone potentially interested in sitting for the exam, in how to prepare to take the exam. The CRM Prep Seminars grew rapidly. Debbie has presented these seminars 29 times in 9 different locations. She has probably addressed between 2,000 – 3,000 potential candidates. She has also personally mentored the following: Sharon LaPlant, Julie Gee, Jeff Baldwin, Sue Burd, Andrew Ysasi, Dave McDermott, and Brice Sample.

In the words of one of her mentees Debra Gearhart's pas-



***Debbie Gearhart and Brice Sample***

sion for the Records and Information profession is contagious. "Attending one of her presentations helped me get excited about being in the field that others perceive as dull and mundane. I realized I didn't have a job - I had a career."

# NEW CRMS FROM AUGUST 2015 EXAM CYCLE
## *PLEASE WELCOME OUR NEWEST CRMS*

| | | |
|---|---|---|
| Natalie H. Austin, CRM<br>Atlanta, GA | George W. Despres, CRM<br>Walpole, MA | Erica K. Johnson, CRM<br>Redwood City, CA |
| Patty Baldacchino, CRM<br>San Diego, CA | Ruth E. Edele, CRM<br>Boston, MA | Peyyi W. Lu, CRM<br>Houston, TX |
| Seth T. Beim, CRM<br>North Plainfield, NJ | Katherine C. Goodwin, CRM<br>Cambridge, MA | Jerry M. Lucente-Kirkpatrick, CRM<br>Goodyear, AZ |
| Liam C. Cannon, CRM<br>Oxford, PA | Penny Izlakar, CRM<br>Burlington, ON, Canada | Trudi Wright, CRM<br>St. Catharines, ON, Canada |
| | Theresa Jackson, CRM<br>Waterloo, ON, Canada | |

# THOUGHTS FROM GEORGE DESPRES' BLOG

**By George Despres**
**University Records Manager,**
**Brandeis University**
*(The content in this blog reflects the opinions of the author, and not of Brandeis University.)*

## Two Cents on the CRM Experience

I've recently made the time (belatedly) to take the CRM exams. While CRM had been slipping on my to-do list for almost ten years, I've been busy doing RIM, though admittedly under a bit of an "impostor" self-image. The exam experience has been gratifying and humbling—gratifying to finally complete and pass, and humbling in the sense that I felt high pressure to pass as a several-year practitioner.

The components, processes, and details of records management are, of course, the focus of exam prep. Throughout parts I-VI, the candidate is immersed in the "what" and "how" of the discipline. This enables you to sniff out guano and contrasts starkly, as will be shown, with the way we are treated as an audience by many RIM software vendors. Let me acknowledge up front that *there are good vendors*. But anyone who has been in this business for a while knows that there are also some bad and ugly ones and that their overtures to us can be lacking at best. The difference between CRM prep and many solution vendors is the difference between precision and vagueness.

On-the-job experience most certainly helped me to navigate the exam challenge. Likewise, the ICRM exam preparation workshop—which I'd highly recommend to prospective candidates—gave me a bead on what subject areas to target, especially for the management part, which can come across at first glance as a pan-MBA undertaking. ARMA literature and William Saffady's *Managing Electronic Records* (4th ed.) proved particularly valuable. Times have changed: I didn't review the Robek and Brown "Energizer Bunny" book. Well, maybe I peeked. Multiple-choice testing tips on the ICRM site paid off. Certain topics in the test material like duplex-numeric and block-numeric filing conventions don't always cross our desks in the trenches, but they do provide a good logical grounding for our vast discipline, and I feel fortified for studying them.

The ICRM has updated part V to challenge candidate proficiency in IT topics indispensable to the profession. Going forward, the Institute will need to maintain these updates aggressively to keep pace with our technical environment. Part VI, the written exam, essentially says, "You've been hired by Institution X, and their records situation is a train wreck. What do you do?" I'd imagine that many fellow CRMs found

*George Despres*

the weeks between taking part VI and hearing back on the results to be long ones. They were for me.

Ten people will likely have ten different opinions on the CRM experience. Mine has been a positive one, and I thank the ICRM for supporting the opportunity for measurable, professional validation.

## Our Profession and its Tools

While the theme of this post has been brewing for several years, CRM preparation led me to reflect back on the things I'm working on at Brandeis, including early assessment of electronic content and records management solutions. An assistant and I have been working on a broad review of many information management software products, big and small, enterprise solutions and niche plug-in apps, with a focus on the lifecycle and control of records. While vague vendor Web language was nothing new to us, this immersive exercise left us astounded by just how hollow and unclear much of the vendor promotional language is. It's almost ubiquitous. Getting to what some products actually do is like peeling an infinite onion. Contrary to their intentions of reeling in potential customers for follow-on conversations, the canned Web sites and some of their related demos and webinars should dissuade any logical and informed person from curiosity.

For example, I recently attended a webinar for a software product that most of us would recognize by name. The webinar was presented by a very senior member of the organization. At one point, I glanced down at my watch and was struck by the fact that, while *thirty-two minutes* had elapsed, I hadn't heard one thing that I didn't already know. I'm not bragging—anyone who's worked in our industry for a year and paid some attention would come to the same conclusion. One would have thought the intended audience was completely ignorant of RIM, IG, and info management. Perhaps that was the case, but we are (I hope) normally decision-makers in such technology acquisitions, and vendors should know this.

Further confusing the vendor product landscape is what they provide today versus what they "plan" to provide "soon," or even what they imply that they currently provide but don't: we are engaged as a client with a well-known and upcoming vendor promising an IG package that curiously keeps slipping (at least for us in higher ed). We're now told that it's coming "sometime next calendar year." Yet they've recently sponsored an IG webinar as if they're on top of it (!) *Walk the walk.*

# GEORGE DESPRES' BLOG

Beta environments also confuse what is and isn't ready for prime time. Broken and dated DoD5015.2 prescriptions and a tectonic shift from bolted-down, über-proprietary enterprise solutions to more open, lightweight, cloud-hosted ones muddies the waters and leads to a tough decision for the solution shopper: do we go with a last-generation, expensive, enterprise behemoth that doesn't play well with other products and that slapped on a lame RM module as an afterthought? Or do we engage the frontier as bleeding-edge early adopters and cobble together and maintain a bunch of emerging plug-in apps, with fingers crossed for the future? This backdrop is no place for ambiguous product promotion.

**The List of Condemned Phrases**

Vendor websites, slide decks, and promos in general should be held more accountable for aimless language. Rehash of obvious facts appears again and again in the talking tracks. The syntax is shallow and imprecise. Understood: they want to mean many things to many people. But it wastes *our* time. It leads to vague or varied understanding and incorrect assumptions. Granted, some of their promises reflect what we need to communicate to stakeholders who have no idea about what we do or are trying to do. But the same old words patronize us and insult our intelligence when targeted at info managers. Furthermore, they are often addressed to a 1990-2005 audience, as if, for example, we don't know that there is a thing called "social media" that can be tricky. We are all well beyond these statements, and the CRM experience, or simple reflection on our work, emphasizes why. The extent to which this vendor hocus-pocus pervades the language is significant.

So, I've created a list of hereby **Condemned Phrases** and statements, or their variations, which should no longer be addressed to the aware, capable, been-there-done-that information management professional. I hope that they are at least good for a chuckle. You are welcome to circulate (proliferate!) the Condemned Phrases among prospective RIM vendors, and to expand upon it. We must cease to be subjected to such patronizing jive as this:

· "The amount of information that organizations must now manage has exploded and has become difficult to control."

· "While traditional paper records management has been fairly straightforward, digital records present many challenges to the organization."

· "We live in a digital world." [Literally, from a major info solution CEO in August, 2015!!!]

· "Knowledge empowers the enterprise."

· "Proper information retention policies are a critical aspect of your compliance strategy."

· "Organizations must account for mobile."

· "Information needs to be delivered to the right people in the right place at the right time."

· "Information is now user-centric. It's all about the stakeholders."

· "BYOD can introduce threats to the security of your organization's information."

· "Organizations need trusted cloud providers."

· "Our data-driven solutions provide for intelligent management of your organization's information."

· "[Product X] will help you meet your customer needs, and it is highly scalable to your environment."

· "[Product X] allows you to reduce compliance risks."

· "[Product X] enables you to streamline LOB/B2B processes while realizing improved ROI."

· "Our open platform and APIs enable seamless integration with all products in the history of humankind."

· "Users expect a simple, straightforward experience."

· "Email presents a special challenge to the organization."

· "Organizations must implement a total/holistic content strategy."

· "We simplify your content lifecycle while enabling you to control, organize, and secure your data."

As a profession, we can and should put pressure on solution providers to cut to the chase. We have a discipline that we work in, study, and master: don't walk us through chapter one of *Intro to RIM*. Granted, there are some solid and promising products out there, backed by company people who really want to provide solutions. That said, we're too smart for the same old jargon. Let us agitate against rhetorical product razzamatazz. Some may say, "Well, that's just sales talk." No! Let's call vendors to the carpet. Let's ask them exactly what they are offering, based on our knowledge of the discipline.

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