



## 2018 Year in Review

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### From the President....

*President, John C. Krysa, CRM/FED*

*Fellow Members of ICRM,*



What a year this has been for the Institute! The Board and our many committees, along with our key volunteers, have been busy. We've had many accomplishments but, since this is my last report as your President, I also want to share some insights about our profession. When I stood up in front of about 240 members at the ICRM Business Meeting at the start of the ARMA Live Conference in Anaheim this fall, I asked the audience a few questions. "How many of your organizations or your clients have an active microfilming operation?" I was surprised there were so many but, at least 10% of the audience raised their hands. "How many of your organizations or your clients have micrographics as one of your information repositories?" About 75% raised their hands. Then I asked, "how many of you have had a serious discussion at work, not a professional development event, about the implications of block chain technologies on your organization's records and information management processes?" The number was only slightly less than the number of those who still had information stored as micrographics. The bottom line is that as certified RIM professionals we must be capable of managing information throughout its lifecycle. We must also be capable of overseeing its governance whether using legacy methods or cutting-edge technology and everything in between.

Our partnership activities have increased this past year. I'm very pleased that we've restored Executive and Board-to-Board contacts between the ICRM and ARMA International, our oldest strategic partner, in order to collectively work to advance our profession. As you've certainly seen, ARMA has made some significant changes in 2018 and I'm very hopeful for increased collaboration on initiatives of benefit to both organizations in 2019. Our academic partnerships are also significant. We now have three academic partners, all accredited universities, offering graduate degree, certificate, or graduate-level certificate programs aligning to the ICRM defined body of knowledge. Think about that a minute. We now have universities with curriculums designed to teach the topics we've defined as necessary for a successful RIM professional, along with other universities reaching out to us. This year we've also had an ICRM presence at 9 major partner conferences and educational events: Designation Academy and booth at ARMA Live in Anaheim, MER, ARMA Canada, NAGARA, NIRMA, Zoological Registrars Conference, all ARMA Regional Leadership Conferences, ARMA Houston E-Records Conference, Digital Government Institute's Records and E-Discovery, and 930Gov conferences.

What else have our committees and volunteers done? Post-Certification Specialty Designations went live with Pearson Vue testing for CRM/Federal Specialist and CRA-CRM/Nuclear Information and Records Specialist. We implemented year-round

# ICRM Leadership Roster

## ICRM Board of Regents

### Chair

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### President

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## Committee Chairs

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### Newsletter Editor

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## Marketing Committee Representatives, Katie Voldal, CRM and Glenn Gercken, CRM

### *Fellow ICRM members:*

The ICRM Marketing Committee worked as a team to review the ICRM website and each member agreed to review a section of the website and made recommendations on changes and additions needed. One example of our efforts is the newly redesigned Partner Page on the website. We have also added two new webmasters due to the retirement of Bruce White and one is already a member of the Marketing Committee. We wish to thank Bruce for all of his contributions.

This year the Marketing Committee was instrumental in designing the new ICRM logo. This logo had various iterations and with the assistance of CapHill, we reviewed these versions for many months before presenting the logo to the ICRM Board for review and then eventually to the full membership.

We also opened a shop at Cafe Press to offer items with our logo to our members; please visit <https://www.cafepress.com/icrmshop> to order items with our new logo.



We are ending this year with a dramatic increase in our social media presence with frequent posts to **Facebook, LinkedIn, and Twitter**. With the recent posting of specific newsletter articles to our public home page, we hope to drive even more traffic to our site. In 2019 we plan to continue to develop marketing initiatives that benefit the ICRM and our members.

## Regent, Legislation and Appeals

### **Paula Sutton, CRM, IGP**

#### *Fellow ICRM members:*

It's been a very productive year for Legislation and Appeals.

#### **Highlights for 2018**

- Appeals Committee convened for 5 reviews
- Various governance questions reviewed
- Bylaws updated to include length of service for committee members
- Reviewed and updated the language in non-disclosure agreements for volunteers and business partners
- Continued to strive for increased ICRM Board transparency
- Participated in the Website Update Committee and coordinated update reviews
- Organized and presented ICRM presentations at each ARMA Regional Leadership Conference held during the summer

#### **Works in Progress for the Committee:**

- Retention Schedule update
- Expand Mentoring Program
- Committee member documentation
- Board member on-boarding program

I want to take this opportunity to say Thank You to Howard Loos who is stepping down as Mentoring Coordinator after 13 years of service! You have given so much time and dedication to the ICRM Mentoring Program and we all send our best wishes. The next year will be a bit different for me as well. I am currently transitioning my role to President-Elect of the ICRM in January 2019 and I look forward to continuing my service with our incredible organization.



## Chair Fairwell



**Chair, Wendy McLain, CRM**

*Fellow ICRM members:*

So long, but never goodbye! My service on the ICRM Board of Regents ends on December 31, 2018 and I'm ready for a bit of down time before tackling a new volunteer role.

I already have one foot out the door but, I'm pausing to say Thank You to the fabulous professionals I have served with between 2012-2018. It was a privilege to work together on these efforts:

- As Regent, Legislation and Appeals, the appeals process was refined to focus less on re-grading Part 6 exams and more on "ensuring the rules were applied correctly". (2012-13)
- As Regent, Exam Administration and Grading, a double grader strategy was implemented that allowed candidates to receive Part 6 scores up to 3 weeks sooner while increasing scoring consistency and reducing appeals. (2014-15)

- As President-Elect, strategic academic partnerships were initiated; 4 concise strategic goals were encapsulated to become the core of the ICRM strategic plan against which all new initiatives are measured. (2016)
- As President, strategic partnerships were extended to additional academic institutions and the exploration of other partner opportunities continued. (2017)
- As Chair, mentorship and encouragement were provided to incoming board members and new volunteers at all levels of our wonderful Institute! (2018).

Lastly, I encourage everyone to look around, find an opportunity, and get more involved in your Institute. You'll be glad you did!

## ICRM Newsletter Editor Report



**Sarah L. Lohmeyer, CRM**

*Fellow ICRM members:*

I'm always excited at the end of December. Another year comes to an end and it's a chance for new experiences and opportunities in the next. Sometimes I stay up until midnight on December 31st but, more

often I don't. New Year's Day is more my speed. It's the first day to begin with that new attitude, start a diet (ugh), or try to live life without constantly worrying about the things that just don't matter.

This year was my first year as Editor of the ICRM Newsletter. I must thank Linda Buss for her mentoring, Wendy McLain for her positive vibes, John Krysa for steering the ship, and Meghan McGrath for tying it all together.

Our next issue is coming out the week of March 1st. 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). I wish everyone health, wealth, and good wishes for 2019!

### 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.

## Member in the Spotlight



**Our first Member in the Spotlight in our year-end issue is Kimberly DeCola, CRM.** Kimberly was born in Long Beach, California, raised in Anchorage, Alaska, and now lives 60 miles south of Austin, Texas. She is currently working on a bachelor's degree focusing on emergency management and business continuity. In her current position, Kimberly is a Records Analyst overseeing the Information Governance Program for the Austin Convention Center. She manages database compliance and migrations, provides training to department staff, develops and implements policies and procedures, and helps with special projects concerning anything and everything related to Information Governance.

Kimberly is busy. She is taking college courses, working a full-time job, and managing a household. This did not stop her from taking and passing all six exams though. She credits her husband as her biggest supporter. As she still tells everyone, "My husband told me to go for it and said I might know a lot more than I thought. It was like a dream; I couldn't believe I passed." Kimberly also credits her mentors with the ARMA Austin Chapter, William Basinger and Vickie Stephens, for giving her support and good pep talks.

This is Kimberly's 12th year of working in records management. She enjoys learning about and dealing with disaster planning and recovery the most. Her favorite stories involve strange places where she's found records stashed. Places include: under an outdoor public pool, in a fire house bathtub, and within a shed surrounded by lawn mowers and gas cans. As she says, "I've learned that if someone really doesn't want to deal with their boxes, they'll find a hiding place." Kimberly loves to work through these puzzles. She wishes everyone outside of records management knew that managing records is NEVER boring.

Kimberly and her colleagues came up with a list of survival tips for those working in records management and information governance.

### Survival Tips for RM and IG Staff

1. Most people will run when they see you coming. Don't take it personally.
2. View this role as a giant puzzle. Think of how great it is when the pieces fall into place!
3. Email is the 800-lb gorilla in the room. Accept it and move on.
4. A bad attitude is like a flat tire. If you don't change it, you'll never go anywhere.
5. You need each other. This is one of those 'it takes a village' things.
6. You need IT. Get to know them and make friends. Have them over for coffee.
7. Expand your circle. Find your champions. Invite them for coffee, too.
8. Don't be offended if someone doesn't want your help. Happily direct them to another team member.
9. You are always a hero when something bad happens.
10. Focus... set small goals and avoid excuses!

Kimberly practices these tips every single day. Like so many of us, she didn't begin her career in records management but, records management found her. She plans to continue her studies and is excited about what the future holds.



## Member in the Spotlight



**Our second Member in the Spotlight for this issue is Steven Dibelius, CRM.**

Steven currently lives in Troy, New York. He is currently a Technical Product Owner at MVP Health Care, a health insurance company located in Schenectady. Steven has a B.S. in Information Technology from the Rochester Institute of Technology and a M.S. in Information from the University of Michigan. He has worked in the field of records management for the past eight years.

Steven began his career as a software engineer and quickly discovered that he did not enjoy pure technical roles. The positions that he had the most success in were those which combined technical responsibilities with an understanding of business and legal requirements. This has made records management a natural fit for him, as it is a multi-disciplinary field. His advice to everyone in the records management community is to experiment with different roles in the field to find out what your strengths are. Steven has worked in technical roles, business roles, and policy-writing roles. He discovered that some areas were stronger for him than others and it was through trying each out that he was able to hone in on what best suited him.

Currently, his day-to-day tasks include working with company business partners to understand their technical needs, creating user stories and acceptance criteria from business partner requests, prioritizing the IT team's backlog of work based on business, strategic, and technical priorities, and developing a strategy for product growth. The products he works on are internal software systems such as a customer relationship management system and a human resources management system. He also works with telecom software that routes calls to the correct customer service representatives. Steven regularly discusses retention and security requirements with his company's IT and legal departments in relation to the software systems he manages. In a highly regulated industry like health insurance, records management and information governance are large parts of his job.

Steven would like to thank Mark Vitale for being immensely helpful to him in preparing for the CRM exams and suggesting where he should focus his studies. At the time he took the exams, Steven was largely working in a technical role in the records management field so questions around physical storage and microfilm were completely outside of his expertise. Studying those topics that he had the least experience with was the most challenging part of becoming a CRM.

The most rewarding experiences in Steven's career came from working at the Vermont State Archives and Records Administration. It was fascinating for him to work with a wide range of departments across state government, and to see the variety of documents housed in the state archives, from aerial highway photographs to tourism marketing materials. The most memorable record Steven has ever seen was the copy of the Bill of Rights sent to Vermont for ratification, signed by Thomas Jefferson.

## President's Message (continued)

testing for Parts 1-5, released new logo and pins, and established a new Examination Preparation Committee while improving the process for updating our exam preparation product slide deck. The Examination Development Committee added new members, changed its structure to add assistant writers who collaborate remotely on test bank review and update, and established a way for CRMs to submit Part 6 Case Studies for CMP credits. Also, body of knowledge outline reviews are underway to update and modernize the topics we test on. Tri-fold handouts for CRMs and CRAs were revised and one created for CRM/FEDs. And the bottom line? Our membership increased with 67 newly certified members. We now have 1,324 certified members as of the 2018 Business Meeting. And maybe best of all, the Board approved a 2019 Budget for many initiatives with no increase in annual dues.

I'm occasionally asked my opinion about the difference between the IGP and CRM. "Which certification do you think is more valuable to my career?" I often flippantly reply, "yes." Both are valuable. Both can help a potential employer discriminate between which candidate is better for a records and information position—one with certification or one without, or one with just a certificate of training. I firmly believe that these two credentials are complimentary. To me, it's not an either or question and certainly not a competition. I typically equate the CRM as the mark of a master practitioner in our profession, similar to the CPA in the financial profession. Yes, the CPA is a licensure but, the CPA is the essential credential discriminating the master practitioner from other highly skilled accountants, analysts, and technicians. We see CPAs who have also earned and display other credentials in a specialized field of practice such as comptrollership, auditing, individual financial planning, tax, and forensic accounting. I think the same about CRMs whose next job or career focus is enabled by credentialing in the cross-functional nature of Information Governance so essential in senior positions and at the policy level. Or, some may seek supplemental credentials to establish their knowledge within fields such as privacy, cybersecurity, information technology, project management, or e-discovery. As this sector continues to evolve in complex rules, laws, risks, and technologies, a certification is certain to be valuable to individuals and employers. Professional certifications, not training program certificates, require documented work experience or education, a rigorous testing regimen, continuing professional education, and adherence to a code of ethics. Also,

our Part 6 case study further distinguishes the CRM. To reinforce this perspective of professionalism, I've included in this newsletter one of the letters sent by a CRM (and former ICRM President) who is retiring after decades inside, and on the periphery, of our profession.

Thank you to everyone who advanced our profession through service to the ICRM. You've served on committees, in appointed roles, as graders, coordinators, mentors, seminar instructors, speakers, and responded to all manner of calls for help on a task or project. I'm honored to have served as your President. I want to give special thanks to those who served on the ICRM Board of Regents, especially Nick DeLaurentis and Wendy McLain who are finishing their elected terms on December 31. Our most visible brand comes from CRMs who serve in positions of significant responsibility within organizations across all sectors and disciplines. Look at who is serving as chief records officer and information management executive positions and you see CRMs. Look at the leadership rosters of ARMA Chapters and Regions and you see many are CRAs and CRMs. Look at the speaker and facilitator list at major RIM and IG conferences and you see more CRAs and CRMs. Competent professionals are our brand--you are our brand. Continue to make us proud with your professional accomplishments and volunteer service!

## New CRMs

as of August 2018

**Azure Brown**

Austin, TX

**Christopher Egan**

Washington, DC

**Donna Faler**

Baton Rouge, LA

**Elizabeth Carron**

Ypsilanti, MI

**Erin Williams**

Georgetown, ON

**Jennifer Chadband**

Boise, ID

**Michelle Snyder**

Batavia, OH

**Paul Maggi**

Orange Park, FL

**Rebecca Katz**

Washington, DC

**Sara Kiszka**

Gainesville, FL

**Sarah Sherwood**

Chelsea, MI

**Teresa Gray**

Willis, MI

**Torey King**

Trenton, NJ

**Warren Bean**

Boise, ID

## New CRAs

as of August 2018

**Allison Matos**

Plainview, NY

**Amy Wirtz**

Pearland, TX

**Blaire Murray**

Carlsbad, NM

**Brandye Patterson**

Burnet, TX

**Brittanny Silva**

New Orleans, LA

**Carolyn Stuard**

Vernon Hills, IL

**Daremy Butler**

Baton Rouge, LA

**Dwight Bejec**

Walnut, CA

**Elle Koshiyama**

Campbell, CA

**Emerson Bryan**

Saint Phillip, Barbados

**Erica Wilson-Lang**

Austin, TX

**Jacqueline DiOrio**

San Mateo, CA

**Kristen Allen**

Topeka, KS

**Margaret Boyles**

Topeka, KS

**Mirjna Orovic-Ravkin**

Woodside, NY

**Paula Lederman**

Toronto, ON

**Ralph Cooper**

Bronx, NY

**Scott Owens**

Kamloops, BC

**Stephanie Roosa**

Olympia, WA

**Teresa Gray**

Willis, MI

**Tiffany Knight**

Riverside, CA

**Tina Gibeson**

Baton Rouge, LA

## 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.



## A Letter from a Retired CRM: John James O'Brien, MA, Retired-CRM

*Dear President Krysa and Members of the Board:*

I write with some regret to confirm that I am retiring my CRM status effective December 2, 2018.

In fact, I have kept my CRM alive for years because I believe that senior practitioners who grow out of the RIM role per se should wave the flag at board and directorate levels. In my varied career, I have done so proudly in both internal and external roles, in North America and abroad, interspersing my consulting work with stints “on the inside” so that each informed the other.

It was an honour to be asked to service on the Ad Hoc Ethics Committee in the late 90s, and thereafter to serve as Regent for Certification Maintenance, beginning the streamlining of what had been an almost unbelievably burdensome role. Later, as President leading the transition to an online presence and the ICRM's first remotely accessible member services database, I incorporated mentorship to senior administrative officers into my role as Director, the Government Records Service, Hong Kong.

My efforts to expand understanding of RIM as a management—and leadership—challenge continued when consulting in Bangkok and Hong Kong, including participation in meetings on Intellectual Capital for Nations, States and Communities held at the World Bank in Paris and urging integration of RIM into content distributed to multinational business leader through my research associates at S4K in Stockholm. Repatriating to Canada, I developed the graduate level course, Records Systems in the Digital Environment for the University of British Columbia's then School of Library, Archives and Information Studies, also serving in the ARMA Canada Young Professionals Mentorship Program. I continue to introduce others to the importance and value of RIM through community development initiatives and my personal businesses which benefit from, but are generally outside of the RIM focus.

Choosing to promote RIM as a profession has not always been a smooth progress, particularly when the work lacks the cachet of Information Technology, the revenue generating capacity of Operations and remains seemingly unknown in MBA programs. But it has the advantage of being core to authenticity and validity in evidence-based practice. That is the stuff of accountability, improvement toward excellence and the foundation of knowledge. Without this ground, speculation and hyperbole rule, and the greater good lost beneath self interest.

With these thoughts I commend you on your service, and that of the ICRM Board and many members who understand that RIM is not disconnected from the actions of leadership. In fact, we are its foundation, and our Code of Ethics demands that Certified Records Managers act with integrity in relation to that truth.

In that spirit, I wish you success in your future endeavours and to Cheryl in her upcoming role as ICRM President. There is much to be done in these challenging times.

With respect, I remain,  
John James O'Brien, MA, CRM



# 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)

