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From the President....

President, John C. Krysa, CRM

Dear Fellow Members of ICRM,

The ICRM Board held its spring board meeting in San Antonio, TX. I was impressed at the time and energy that so many volunteers put into the work of the ICRM as members of committees and project teams. We continue to sustain many activities while selectively pursuing new initiatives for the betterment of the RIM profession and the prestige of our certification as CRAs and CRMs. Thank you to President-Elect Cheryl Pederson for leading our strategic planning session to add new items and to identify implementation details for those coming up next. ARMA International President-Elect Ryan Zilm accepted our invitation to attend board deliberations for part of our strategic planning. This was a great opportunity to strengthen our relationship with ARMA as our oldest partner organization and to identify opportunities to work together. Under Regent Paula Sutton's leadership, we expect to have ICRM representation at all ARMA Regional Leadership Conferences by providing information and materials to CRMs already planning to attend.

By now you've seen the new ICRM logo. This was released in April after a re-branding effort that began over two years ago and was approved by last year's Board. The logo is also registered trademark, as part of protecting our brand. Special thanks to the Marketing Committee for their work. The new ICRM sign and table cloth had its first reveal at the MER Conference. I used them while promoting ICRM certification at the ARMA Canada Conference in Vancouver held this past May. You should expect to see it in use at partnership events around the country. These include conferences for NIRMA, NAGARA, Zoological Registrars Association, Digital Government Institute, InfoGovCon, and finally on the Expo Floor at ARMA Live in Anaheim, CA.

I want to recognize the first to be credentialed as Certified Records Manager/Federal Specialists. After a development effort that began in 2015, we had the first CRMs to earn this new post-certification specialty designation pass the exam in February. Congratulations to new CRM/FEDs: Deborah Armentrout, Bruce Bailey, Carol Brock, Elizabeth Christie, Rebecca Fitzgerald, Michael Fox, Margie Janney, Carolyn Offutt, Cheryl Smith, and Tammy Strickler. For information about eligibility and applying see: <http://www.icrm.org/fed-spec-landing-page>.

Last year, we established a partnership agreement with AIIM. One of the benefits to ICRM members is a discount when enrolling for AIIM's education and training courses. This discount benefits candidates preparing for exams along with CRAs & CRMs needing training or CMPs. For the code, please see our partnership page on the members-only part of our website: <https://www.icrm.org/partnership-offers>.

There are many opportunities to help with the work of the ICRM. An initiative proposed by Regent Caroline J. Walters was approved by the Board and involves CRMs independently writing and submitting Part 6 case studies in exchange for CMP credit. Caroline will soon provide guidelines along with the specific template to use in developing case studies, which will also require a solution summary and grader guide. This is an opportunity for us to increase the exam test bank with contemporary problems that we as CRMs face in our professional practice. Look for details very soon.

Finally, the ICRM code of ethics requires all CRAs and CRMs to be mindful of our fiduciary responsibilities as RIM professionals for the information held or used in an organization. For some, that means we may transition to an information governance approach for policy management. RIM is foundational to that approach and expectations of competence in information management and ethical obligations as Records Managers remains vital.

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

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 ICRM
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 Suite 101
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 (518) 694-5362
 Fax: (518) 463-8656

Website: www.icrm.org
E-mail: admin@icrm.org

ICRM Leadership Roster

ICRM Board of Regents

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CANDIDATE COACH



**Howard Loos, CRM, IGP -
ICRM Mentor Coordinator**

Hello ICRM candidates,

Are you taking Parts 1-5? A study guide is available to help candidates with Parts 1-5. The study guide contains a short list of recommended reading materials and encourages candidates to

use the outline available on the ICRM website. Please email me at mentor@icrm.org to obtain a study guide.

Are you taking Part 6? If you are ready to take the Part 6 exam, having a mentor is a must. If you are unable to find a Part 6 mentor from your local ARMA Chapter, please reach out to the ICRM Mentor Coordinator at mentor@icrm.org to request a mentor. After the assignment has been made, you will receive a packet of prep materials along with a study guide and four recently retired practice exams.

To all Mentors and those who would like to be a Mentor

If you are serving as a Part 6 mentor, please notify the mentor coordinator in order for CMP credits to be approved for your mentoring activity. Mentors are eligible to receive up to three CMP credits for each candidate during an exam cycle, as long as feedback from at least one submitted exam is provided to the candidate.

For those who would like to serve as a mentor, please send an email to mentor@icrm.org expressing your desire to serve.

We can always use the help. Here are a few Q/A's to help you understand the role of 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 first, to answer questions related to the examination process and second, 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 mentors?

- Practice Exams with answer guides – Each year, the ICRM retires two 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 be provided with the 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 Exam Preparation Resources are available at <http://www.icrm.org/exam-preparation-resources/>. For Part 6, this webpage includes a link to a Part 6 Sample Business Case (Practice Exam), as well as strategies for passing the exams.

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.

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.

ICRM Marketing Committee Update



***Katie Voldal, MPS, CRM, IGP
Marketing Committee
Coordinator***

The Marketing Committee continues to meet twice a month. Current members include Tod Chernikoff, Glenn Gercken, Jo Goldstein, Christie Jensen, Peter Kurilecz, Mary Laverdure,

Meghan McGrath, Cheryl Pederson, Vicki Pratt, Kathleen Smith, Katie Voldal, Kiersten Ward, Colleen Westerlund and Brett Wise.

Glenn Gercken and Brett Wise are our liaisons to the Website Committee; Glenn has begun training on the tool used to make edits and updates to the site. Mary Laverdure is our liaison with the CapHill Social Media Team and manages our LinkedIn and Facebook pages. Peter Kurilecz does significant posting on social media and we have started to use some of his posts on our Twitter feed. Cheryl Pederson is our Board liaison. Kiersten Ward continues to support Exam Prep Product in conjunction with Exam Development and Marketing Committees. Jo Goldstein has taken on the new task of posting newsletter articles to the public portion of the website.

We were very excited to roll out our new logo in April. This was an enormous task completed with the combined efforts from the Board, our CapHill team, and the Marketing Committee. From small tasks such as how the new logo will look on a pin, to the larger tasks of editing the look for brochures, the ICRM booth, and our table cloth. We all worked together to make decisions and came to a consensus regarding every item. Cheryl has taken the lead on getting our new logo trademarked, a step we all agreed was important.

With Glenn's assistance, we will continue to update the attachments on the website with our new logo. Some items will be left as is, such as old press releases, all others will be updated. Our social media presence has dramatically increased and changes will be made to our LinkedIn groups and page. Specifically, our LinkedIn group for members only will now be closed and a new one created that can be viewed by the general public.

A new location will be created on our website to hold newsletter articles; this will allow us to mention these articles on social media and direct people to our site to read those articles.

There are many upcoming partner events. Please check out the website for details, <https://edc.icrm.org/partner-page-2>. The Strategic Alliance Committee organizes these events. The Marketing Committee assists with postings to social media, email blasts, and in some cases lending people power to the ICRM booth or as a speaker. The recent DGI E-Discovery event held in DC on March 22 (see photos curtesy of John Krysa) is an example of one of our partner events.

The Marketing Committee will once again turn our focus to the possibility of placing ads with sister organizations. Based on data gathered from the 2015 survey, the most likely organizations will be the Academy of Certified Archivists, the International Association of Privacy Professionals, the Society of American Archivists, and the American Society of Administrative Professionals. Our goal is to develop a marketing and advertising plan to better reach out to members of these important organizations.

As you may know, the ICRM Board has been working to increase our post-certification specialty designations and this year the CRM/Federal Specialist was finalized. This designation is intended for those whose professional practice involves RIM programs within the Federal Government. The Marketing Committee has been working with NAGARA as marketing brochures and the logo are developed for the new designation.

In the coming months we will be looking at digital badges (**See ACCLAIM: <https://www.youracclaim.com/>**) as well as an online merchandising resource. Additionally, a list of tasks has been shared with us from the recent Board meeting and we will be investigating and developing plans for each of these items. If you have suggestions regarding the work of the Marketing Committee, please don't hesitate to reach out.

Advancing From Rim To IG – Beyond Your Project Plan

**This is Chapter III of the article series. Chapter I was published in the Fall 2017 issue and Chapter II was published in the Winter 2018 issue.*

Karen S Knight, CCEP



An organization's advancement to information governance (IG) from records and information management (RIM) is a far-reaching endeavor. This transformation relies upon collaboration among multiple disciplines across your organization. Realizing this level of cooperation is no simple task, begging the questions:

- With whom in your organization is this alliance relevant?
- What is the unifying premise?
- How are these coalitions accomplished?
- What can frustrate the creation and viability of these critical relationships?

We'll use these questions to examine this crucial IG advancement aspect, but first – context. While numerous definitions of IG exist, I offer (and endorse) The Sedona Conference® version:

Information governance is the comprehensive, interdisciplinary framework of policies, procedures and controls used by mature organizations to maximize the value of an organization's information while minimizing associated risks by incorporating the requirements of e-discovery, RIM and privacy / security into the process of making decisions about information.

Plainly stated, aligning an organization's information-centric disciplines within an IG platform can support cohesive, information-oriented decision-making. Further, while related, IG is distinct from and broader than RIM.

So, how do you build a comprehensive IG framework? What priorities must comprise your interdisciplinary construct checklist?

INTERDISCIPLINARY IMPERATIVES

An understanding of your organization's culture type informs your IG implementation. IG Program Tone at the Top is strong and energetic.

Now comes cross-functional coalescence – developing a comprehensive, interdisciplinary alliance.

So, which disciplines must come together?

In your organization, they could include:

- Privacy
- Legal Hold Program
- Information Technology
- Information Security
- Ethics and Compliance
- Records Management
- Contract Administration
- Enterprise Risk Management
- Business Continuity

Building an IG Program **IS NOT** *empire-building*. It **IS NOT** intended to trigger *turf battles*. Instead, IG encourages an environment for shared business benefit.

The disciplines must engage for mutual purpose. Without information, not one of them can perform their jobs. Framing these disciplines within an IG construct will facilitate collaboration for optimizing the value of information and minimizing information-related risk.

What will unify these disciplines?

Easy – the information.

Information is the fulcrum upon which all business tilts. It is imperative that the previously-detailed disciplines, or those in your organization similar to them, align to focus on the realities associated with this crucial business asset:

- Information serves as evidence of business transactions
- It facilitates business process, operations, and other business activities
- Information supports regulatory compliance

As an organization's business presence and saturation grows, so goes its risk. Information provides a foundation upon which your organization's near-term objectives, its pace of change, and its long-range goals are decided.

This alignment **IS NOT** a take-over. It is cooperation *vis-a-vis* information. With IG, every information-centric discipline – consequently – all employees share responsibility for your organization's information.

How is this interdisciplinary alliance realized?

An IG framework does not occur spontaneously. It must be built, collaboratively, as an integrated program. So, what should you think about? What must be considered?

What must you incorporate as you establish this interdisciplinary platform?

- ✓ Your organization's influencers – both internal and external
- ✓ Principles to inform your IG Program
- ✓ IG Program roles and responsibilities
- ✓ IG Council Charter
- ✓ Communication means and methods

Influencers

influencers shape the objectives, course, and focus of an organization AND its information. Accordingly, building an IG Program in response to and in concert with external and internal influencers supports internal policy and external regulation while enhancing the engagement and support of your organization's numerous and relevant disciplines.

What elements influence your organization?

Principles

Principles inspire action. They establish a basis for existence. Decide which / that all of the following principles will inform the construct of your organization's IG Program:

Advancing From Rim To IG – Beyond Your Project Plan

- **Alignment:** Work in concert with the foundational tenets and business objectives of your organization.
- **Standardization:** Provide IG processes that can be applied consistently across all information-related disciplines.
- **Simplification:** Advance the IG Program by updating existing information-related policy and process. Use existing committees and roles to avoid duplication.
- **Accessibility:** Provide information creators and users a forum to escalate and address information-related risks.
- **Sustainability:** Maximize the value of the IG Program over time.
- **Transparency:** Clarify accountabilities and responsibilities.
- **Quality Control:** Allow for continuous improvement.

Roles and Responsibilities

Executives, directors, managers and all other employees are accountable to your organization, to the customers / clients they serve, and to each other to govern information. Their IG roles and responsibilities are prescribed by the Program and include:

IG Program Staff

The mainstay of the IG Program, they oversee IG Program advancement.

IG Program Executive Sponsor

Appointed by the Board of Directors or the CEO, the sponsor is the IG Program champion.

IG Council / Committee

Interdisciplinary subject matter experts who support IG policymaking and oversee IG projects.

IG Working Group(s)

The IG Council's interdisciplinary implementation mechanism(s).

Employees

Responsible for IG Program compliance.

Some roles are consultative; some oversee and some implement. Explicitly defined roles will assure that IG Program tasks are accomplished and requirements and processes are followed.

IG Council Charter

This document supports the IG Council's collaboration with and guidance of those having IG roles. The Charter must detail the following Council attributes:

- Purpose
- Responsibilities
- Membership
- Roles
- Membership Qualifications

Communication

Partnership and collaboration are critical as IG advances from RIM – communication is the mechanism.

Communication channels must be formalized to involve the IG Program Staff, the IG Program's Council and Working Group(s), and your organizations' employees and executives.

Communication must be continuous and systemic, optimizing interaction, interdependency and cooperation, and may include:

- Mandatory IG education and training, to include during on-boarding
- Quarterly IG newsletters
- Periodic IG Awareness Campaigns
- An annual attestation to an IG-related question(s) on your organization's Ethics or Compliance Certification

The success of the IG Program will be strengthened as communication is optimized. The IG Program Staff, its Council and Working Group(s) are both supporters and benefactors of these communication means and methods.

What can challenge these INTERDISCIPLINARY IMPERATIVES?

A cohesive, interdisciplinary platform will enable your organization's successful advancement from IG to RIM – BUT – don't lose sight of the prerequisites, culture and Tone at the Top.

Culture matters a great deal to successful IG Program outcomes. Compel and leverage executive support for your IG Program advancement.

The volume of information, particularly electronically-stored information (ESI), is growing rapidly. IG will enable the management of your organization's information, as the technical challenges and the unprecedented legal issues of the digital age increase. Your interdisciplinary IG program will unite for business good.

References:

Advancing from RIM to IG – Beyond your Project Plan

Chapter I – The Culture Dynamic

Chapter II – Tone at the Top

Cohasset Associates | ARMA International 2016 | 2017 Information Governance Benchmarking Survey White Paper: Transforming Information Management

Coming Next:

Chapter IV – Gaps, Threats and Risks will detail the attributes necessary to support a current-state assessment of the maturity of your organization's existing RIM program.

**Karen S Knight, CCEP, Principal Consultant
Cohasset Associates, June 2018**

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 frequent speaker and workshop leader on these and many other information-related topics. Ms. Knight can be reached at karen.knight@cohasset.com.

Member in the Spotlight



This issue's Member in the Spotlight is Thom Souza, CRM. Thom is from a military family and was born in New Mexico at Holloman Air Force Base. His youth was spent on various bases in Guam and the Philippines. He is currently a Corporate Records Manager for a biotechnology firm located in the Pacific Northwest. He has worked in the field of records management for over 14 years. His career plan evolved from a process of self-discovery and learning. Once he found his passion for archiving and records management, he has never looked back.

In college, Thom was originally a Biology major. This proved to be invaluable for landing his first records management job with Amylin Pharmaceuticals. Before he graduated though, he changed his major to English, Business Writing, and Comparative Linguistics as he intended to teach. As Thom says, "My semantics and linguistics background helps navigate working with diverse groups within large corporations." He has also completed classes at Los Angeles Upright Citizen's Brigade where he honed his improvisational skills to creatively play and engage people.

Thom is as creative as he is analytical and his family has played key roles in helping him shape his career path. Thom's records management training began as a child. He says, "My brother wouldn't let me read his comic books until I knew how to handle them with care and organize them. Comic books were ground zero for my archival habits." Thom's mother was another catalyst. He says, "My mother was an educator who focused on technology and reading. She has a master's degree in history and she started my life-long love of reading, organization, logic, and process improvement." Thom thanks both his brother and his mother for setting him up for success.

Along with his family, Thom credits his professional mentors for helping him align his passion for organizing with the records management career path. These mentors include Bonnie Menasce, Donna Dutton, Debra Gearhart, and Juanita Skillman. To Thom, they have been steady hands helping to guide his career. He says, "In this work the people we meet and the relationships we create are lasting in legacy and impact." Thom is grateful for all of the support he's received over the years.

It was because of the support and advice from his mentors that Thom moved forward to obtain the CRM certification. His work experience and study preparation paid off and he was pleased when testing time came around. He had one minor snag though. Thom says, "I passed all the tests I took on my first appointment in a four part marathon. The hardest part was that the test proctor would not pause the timer for bathroom breaks which was grueling, but I survived and am stronger for it." Thom had one more challenge to face for his last exam. He says, "Part 6 was difficult because as a left handed person the dry erase marker ink, along with the notes I jotted down, kept rubbing off on my hand." Thom made it through though. His advice is to prepare, study, then relax and let the answers flow.

Thom loves the career he's chosen. He applies what he's learned from working in the records management field to his life and he applies life lessons to his work. He says, "I tend to choose work that challenges me and even scares me a little. I think this is a critical time in our industry where we need to assert our value and embrace a new framing of our identity and potential." Thom realizes that records management isn't just about records either. "There is always a human component to systems. Listen and empathize with your colleagues and the respect you show them will drive change," says Thom.

New CRAs

from February Cycle

Adam Becker
Beavercreek, OH

Andrea Encina
San Antonio, TX

Ben Lutkoski
Durham, NC

Chris Estolas
Torrance, CA

Christina Parenteau
Champaign, IL

Colby Pennington
Cedar Park, TX

Diane Dunlop
Seba Beach, AB

Dondee Groves
Artesia, NM

Elesha M. Johnson
Thornton, CO

Elizabeth Carron
Ypsilanti, MI

Erica M. Lamb
Louisville, KY

Erin Williams
Georgetown, ON

Fawn Yu-Fang Smith
Richmond, BC

Janelle Kowalchuk
Calgary, AB

Jessie Weston
Jackson, MI

Julie Torres
Sparks, NV

Laura Mattys
Austin, TX

Leslie Starczewski
Madison, WI

Magdalena Salinas
Corpus Christi, TX

Mark Packard
West Allis, WI

Nicole Gagliano
Baton Rouge, LA

Oscar Quinones
Boqueron, PR

T. Ricia Washington
Atlanta, GA

Victoria Etterer
San Ramon, CA

Warren Bean
Boise, ID

New CRMs

from February Cycle

Andrew San Agustin
Everett, WA

Chris Kuiken
Merrillville, IN

David Jarmuth
Rockville, MD

Deborah Lindley
Santa Rosa, CA

Jennifer Coker
Hutchinson, KS

Lauren Kwasniewski
Turtle Creek, PA

Matthew Logie
Reston, VA

Michael Garrett
Morgantown, WV

David Ross
New York, NY

Nathanial Smith
Boston, MA

Philip Guenther
Charlotte, NC

Stephanie Clark
Salem, OR

Wendy Sue Gibson
Seattle, WA

New CRM/ FED

from February Cycle

Deborah Armentrout
Adamstown, MA

Bruce Bailey
Fairfax, Virginia

Carol Brock
Austin, Texas

Elizabeth Christie
Boyd's, Maryland

Rebecca Fitzgerald
Brooklyn, New York

Michael Fox
Carlsbad, New Mexico

Margie Janney
Rockville, Maryland

John Krysa
Littleton, NC

Carolyn Offutt
McLean, Virginia

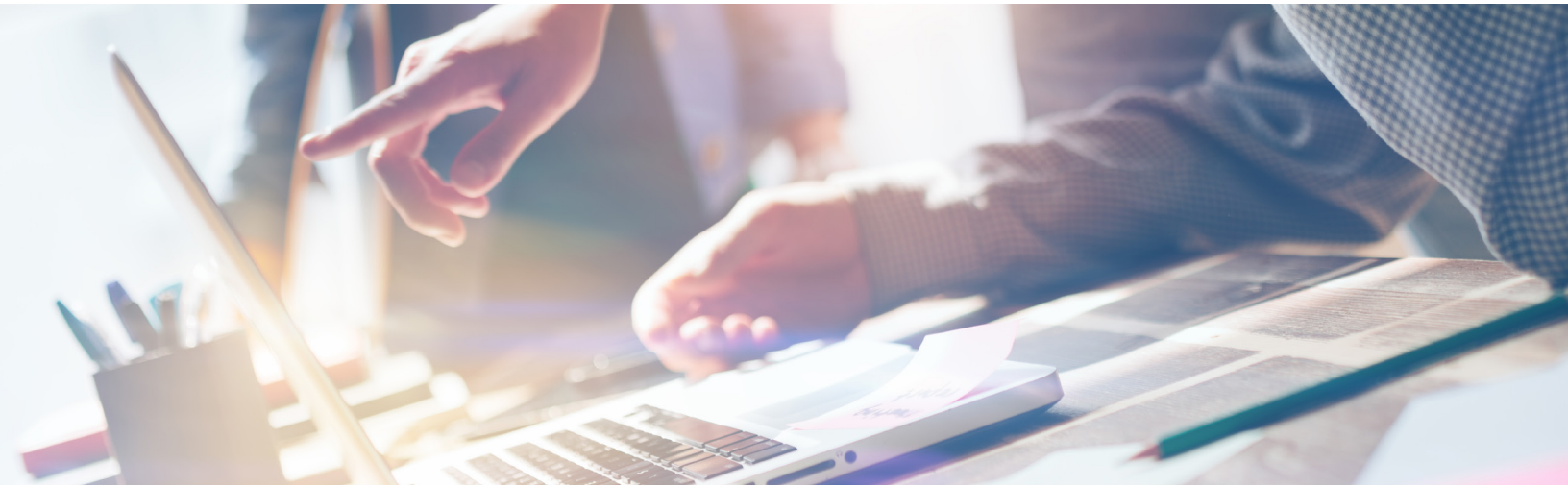
Cheryl Smith
Ijamsville, Maryland

Tammy Stickler
Stephens City, Virginia

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.



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

