

2014 FALL

WHAT'S INSIDE...

ICRM Leadership Roster Page 2

Finding Interest in NIRMA
in China Page 3

Member in the Spotlight:
Jean M. Ciura, Ph.D., CRM .. Page 4

Jeff Baldwin Passes Away
at 50 Page 5

Spotlight on ICRM Legislation
and Appeals Page 5

Welcome New CRMs Page 6

Tod Chernikoff Wins
Alan Andolsen Award..... Page 8

ICRM Salary Survey Results Page 8

CRM Exam Grading Updates ... Page 9

Dallas ARMA Chapter Hosts
Southwest Region CRM
Conference Page 9

ICRM Pre-Approved CMP
Activities Page 10

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FROM THE PRESIDENT...

I just returned from San Diego where the ICRM held its fall Board meeting and the 39th Annual ICRM Business meeting and reception. It was great to see old friends and to meet new ones.

During the ICRM business meeting I shared some of the progress we have made during the last year. We completed the next transition to our new system of governance and administration. The by-laws were reviewed and updated to conform to our new structure. The Board conducted a review of the organization's technology/automation infrastructure.

We also set benchmarks for 2015. Because we are reducing the size of the Board we would like to reinvigorate our committees and the work they do on behalf of the ICRM. This will provide more opportunities for members to participate in committee work. It is a good way to help direct the organization. It is also a chance to dip your "toe in the water" and may lead to serving on the Board itself. We

are very interested in developing new outreach programs to increase membership and identify new potential candidates.

We welcomed forty-four new Certified Records Managers this year. Nine passed in November 2013; ten passed in February 2014; fifteen passed in May 2014 and ten passed in August 2014. The May test period was the first test cycle using the fifty/fifty exam formula.

As of October 1, 2014 there were 978 active CRMs and 178 retired CRMs. There are currently 998 candidates in the test process. So far this year 143 new candidates were approved to test. There are currently seven CRMs who had let their certification lapse and have applied for reinstatement. Several candidates mentioned that they had received their ap-

(Continued on Page 6)



*President Rayanne
Waggoner, CRM*

CONGRATULATIONS ELECTION WINNERS



Brice Sample
President Elect



Sharon LaPlant
Regent - Exam
Development



Nicholas De Laurentis
Regent - Applicant &
Member Relations

ICRM LEADERSHIP ROSTER

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FINDING INTEREST IN NIRMA IN CHINA

**By Mary Binkholder, CRM/NS
NIRMA President**

This past April I was honored to speak at the Nuclear Information Technology Forum in Shanghai, China, representing the Nuclear Information and Records Management Association (NIRMA). NIRMA was asked to be an endorser of this conference, and, as NIRMA President, I was asked to speak. The Chinese are very interested in our organization because they have no counterpart. China is building many new nuclear power plants with 28 plants in the construction phase and 20 already in service. Also, they are aggressively building and improving their infrastructure (highways, high-speed trains, high rise apartments, etc.).

The second annual conference attracted more than 250 nuclear IT experts and 25 sponsors including INVENSYS, Siemens PLM, Aveva, Bentley, PTC, China Realtime Database, Beijing Hsoft technologies and others. There were two sessions; one focused on “nuclear enterprise management and operation informatization,” and the other dedicated to the nuclear equipment and NPP design information management. I opened the first session by welcoming the conference attendees with information specifically about NIRMA. Later in the conference I gave a presentation on “Information and Records Management in the U.S. Nuclear Industry” which was very well received. Later in the conference I participated on a panel discussion on the topic of “Cost and Effect of Informatization in Nuclear Companies.” While language was a barrier we did have translators who assisted during the presentations.

Here are a few of my observations from their presentations:

- One of the presentations covered the topic of Configuration Control. The speaker, who works for Intergraph, referenced the ANSI/NIRMA CM 1.0 standard in his presentation.
- Most of their power plants use Windows XP and plan to keep using XP as long as possible. They mentioned that it would cost over \$1B USD to move to Windows 7 or 8. They have difficulty sharing information among plants due to different software formats and are exploring use of wireless technology/mobile applications.
- They understand the problems of records management.
- They know that they have a pollution problem which is complicated by increased consumption of energy. China



is first in the world in carbon dioxide emissions as a result of their rapid growth. They noted that they believe that climate change is a fact and they know that they need to reduce carbon emissions. They want a beautiful China.

- Safety is priority and are serious about it. They understand the importance of documenting issues as they occur for future reference.
- They desire to be multinational companies. They recognize the need for innovative technologies and policies to transform from just a big energy company to a smart, clean energy industry.

It is always interesting to see the influence the United States has in other countries. At the conference they presented awards to a group of Chinese consultants. During the presentation the music played was the theme from the movie “True Grit.” Signage at airports, hotels, subways, etc., was displayed in Chinese and English. I was impressed by the abundance of Starbucks, KFC and McDonalds’ restaurants in the cities we visited. The food at McDonald’s tasted the same! We visited several cultural sites such as the Great Wall, the Terra Cotta Warriors, the Forbidden City, Tiananmen Square and more. China’s civilization dates back many millennia and much of their ancient cities and artifacts are well preserved.

It was difficult to determine the real impact of my presentation. However, I believe the trip was an important step in NIRMA’s outreach to the international community and a first step to an on-going cooperative relationship with China. China is building more nuclear power plants than any other country in the world and they appear to recognize the need for international cooperation.

MEMBER IN THE SPOTLIGHT: JEAN M. CIURA, PH.D., CRM

Our member in the spotlight for this issue is Jean M. Ciura, Ph.D., CRM. Jean has a Ph.D. in History from the University of Rochester, Rochester New York. She completed her research in Europe with a Fulbright-Hays scholarship and returned to Wisconsin to teach and to become an archivist. Somewhere along the line she was introduced to records management and hasn't looked back earning her CRM in 1985.

Jean states, "I was teaching history at the University of Wisconsin, studied Archives Management, and worked as an Assistant Archivist. I was asked to head up a project by the National Historical Publications and Records Commission (NHPRC) through the National Archives to as-

sess and report on corporate record keeping practices. During the course of this grant I inventoried more than a million files of companies in Southeastern Wisconsin I met and worked with corporate executives in many different industries, and soon became intrigued with how management understood but was challenged by managing information. One of the most interesting contacts I made was Chris Zanotti, who was the Records Manager at JI Case. We soon became professional acquaintances and she was instrumental in convincing me that my knowledge and talents could be very useful in this profession. To this day, I credit her with enthusiastically encouraging me to work in this field. I also have tried in turn to pay it forward by mentoring several associates to work in the field as well."

Jean recalls her career path in records management starting as a consultant with Record Controls, Inc. a small consulting and records storage firm in Chicago. There she worked with Marjorie Payne who was winding down her career in records management. Jean recalls it was an extremely challenging role as, once again, she worked with a diverse group of industries and law firms. It proved to serve her well in her career as an in-house professional and a consultant.

Over the years Jean was inspired by individuals in the records management field. She revealed that several people were significant in her career and wanted to give credit to Marjorie and Chris. She stated they were the most inspirational because they were strong women who knew the value of information management and had to compete with executives to get everyone's attention focused on what needed to be accomplished. They were passionate about records management and valued their careers very much. They also gave back to their profession and to ARMA, becoming real ideals of to what an ARMA member should aspire.

"Information managers cannot impose or dictate requirements to everyone and establish programs that are of their own design no matter how important or critical they seem at the time."

In the time since attaining her certification Jean has observed the field changing. She observed that, "The discussion has widened, becoming more focused on technology, business requirements, and greater options for system implementations. The discussion has helped information managers draw more attention to the criticality of the profession and to draw in more internal partners than ever before. However, technologists must still adhere to the governance principles that good information management requires and they need a solid foundation in these principles in order to adopt systems and strategies that are appropriate."

In everyone's career there are memorable moments. Jean shares a couple of hers. "As a consultant, I recall another consultant jokingly said that if a client truthfully wanted arsenic, she would give it to them one teaspoon at a time so they wouldn't die. While it may have seemed, at first, that the consultant was suggesting a complete buyout, it really spoke a quiet truth that seasoned professionals know. Information managers cannot impose or dictate requirements to everyone and establish programs that are of their own design no matter how important or critical they seem at the time. First, adjustments that need to be made in every project as it develops and not everyone arrives to the table at the same time. Change management is as much our job as records management. All programs understand that a team effort is required and there has to be give and take to make a project or program work. The job of a records manager or consultant is to know the strategic goal and work with each team to make the project or program a reality. This is not often immediate.

"When I was working an important engagement with a Chicago organization, a senior executive told me: 'Jean, I have learned to treat everyone here with respect, from the janitor to the Chairman of the Board and it has served me very well'. Another key to success is learning that everyone is a partner and, if they are willing, can participate in a successful implementation."

In the course of her work Jean has seen records stored in barns, under factory floors, discarded in warehouses, garages, and abandoned offices. In every case, some of the information had questionable value, but the resources and tools to sort between the good and the useless was not available. In this sense, information management is still facing the same difficult choices and looking for the appropriate directives.

When not hard at work at her day job, Jean enjoys travel, staying at and hosting friends at their vacation home, reading and walking her adorable yellow lab.

We want to extend our thanks to Jean Ciura for being our member in the spotlight for November.

JEFF BALDWIN PASSES AWAY AT 50

It is with great sadness that we inform you about the death of our friend and colleague Jeffrey Baldwin.

Jeffrey Lyn Baldwin, age 50, passed away on Thursday, September 25, 2014, after a courageous battle with cancer.

Jeffrey was born on June 17, 1964, to Vernon "Bud" and Ilo Baldwin in Eaton Rapids and graduated from Eaton Rapids High School in 1982.



Jeff was employed as a records analyst for the State of Michigan, Records Management Services where he worked since 2004. He enjoyed working with records management customers, especially those in law enforcement. He played an essential role in moving the State Records Center facility to its new location in 2008. He coordinated the successful movement of approximately 380,000 boxes of records over a two month period during which retrieval activity continued at normal

service levels and without losing a single box: a phenomenal accomplishment. Jeff was also an active member of Association of Records Managers and Administrators (ARMA) for 27 years. He served the Mid-Michigan Chapter of ARMA as an officer on multiple occasions. He became a Certified Records Manager in 2006. He was very proud to have passed the examination process in a single testing cycle. Jeff made new friends easily and he was well liked and respected by his friends and colleagues.

Preceding him in death was his father, Vernon "Bud" Baldwin. Surviving are his wife of 22 years, Teresa Baldwin; 2 sons, Ian Baldwin, Aaron Baldwin; mother, Ilo Baldwin; 3 brothers, Mike Baldwin, Kevin Baldwin and Doug Baldwin all of Eaton Rapids.

A scholarship fund for his sons, Ian and Aaron, is under development to assist with their education expenses. Inquiries about this fund can be sent to jeffbaldwinmemorialfund@gmail.com.

SPOTLIGHT ON ICRM LEGISLATION AND APPEALS

**By Wendy McLain, CRM
Regent, Exam Administration & Grading**

The Regent, Legislation and Appeals (RLA) is "responsible for the administration of the appellate process." Sounds mysterious, right? Perhaps, but for good reason. Information presented during the appeals process is often sensitive, so the RLA strives to protect the privacy of Appellants as well as the Committee members. Unlike other Regents, the RLA doesn't typically report an account of activity for the year. As former RLA (2012-2013), I'd like to share a bit about my experience for the benefit of candidates and members. Like in the "Dragnet" series, the story you are about to hear is true. Only the names have been changed to protect the innocent.

What can I appeal? The CRM Handbook identifies the following things that can be appealed:

1. An Applicant may appeal Certification Standards Committee decisions.
2. A Candidate who fails Part VI by fewer than eight points (63%-69%) may appeal the grade.
3. A CRM may appeal denied CMPs.

Is that all? It is difficult to anticipate all of the circumstances that an applicant, candidate, or member may want to appeal. For that reason, as RLA I tried to keep an open mind to review any written appeal. Some other types of appeals reviewed include:

1. Interpretation and application of procedure.
2. Decertification
3. CRM-Retired
4. Cycle Extension

How do I appeal? An appeal must be made in writing (email is preferred) to the RLA. Complaints and special requests should be addressed to the relevant Regent or Board member for assistance. For example, complaints about exam environments (such as a fire drill in the middle of exam) are handled by the Regent, Exam Administration and Grading. If the issue is unresolved, then you may submit an appeal to the RLA. Keep in mind that although the Board member may forward your issue to the RLA for awareness, it isn't an appeal until you submit it directly to the RLA indicating your intent to appeal.

What can't be appealed?

1. Decisions of the Appeals Committee.
2. Scores on Exam Parts 1-5.
3. Decisions of the Ethics Review Committee

The Appeals Committee worked diligently to apply logic and compassion to each and every appeal we reviewed. It was our aim to ensure balance and fairness in every situation. After thorough review of circumstances, procedures, processes, and root causes, we delivered fair decisions and recommended change where it was needed. It has been my privilege to serve the ICRM as Regent, Legislation and Appeals.

NEW CRMs FROM AUGUST 2014 EXAM CYCLE

PLEASE WELCOME OUR NEWEST CRMs

Arthur W. Allen, CRM
Anchorage, AK

Greta Boeringer, CRM
Washington, DC

Emily McCarthy, CRM
Woodbridge, CT

Tony Arambarri, CRM
Mission Viejo, CA

Tom Corey, CRM
Charlotte, NC

Melissa Wallis, CRM
San Antonio, TX

Karen E. Bjornseth, CRM
Grand Forks, ND

Rachel E. Desormes, CRM
Denver, CO

Alex Webb, CRM
Austin, TX

Sarah D. Mamer, CRM
Saskatoon, SK Canada

PRESIDENT'S MESSAGE (Continued from Page 1)

proval notification in less than a week. I know that Nick De Laurentis, Regent - Certification Standards, and his committee have worked very hard to reduce the turnaround time on the approval process.

We changed our election cycle to follow the ARMA conference. We felt that this would give the candidates an opportunity to introduce themselves to the other association members prior to the elections. The call for nominations was sent out in mid-August and candidates were notified of their acceptance September 16. Voting took place from October 31 to November 28. Results will be announced November 29.

The Board continues to move to our new governance model. The positions of Regent – Exam Administration and Regent – Grading were successfully combined the beginning of 2014. The positions of Regent Exam Development Committee and Regent – Professional Development will be combined in January 2015. The positions of Regent – Certification Standards and Regent – Certification Maintenance will also be combined in January 2015 and will be renamed Regent – Applicant and Member Relations. In January 2016 the positions of Secretary and Treasurer will be combined to complete the Board transition.

Our financial status remains strong. As of Q3 2014 our total assets were \$236,898.00. The Board has worked to maintain a balanced budget. Because of our strong position there will be no increase in membership dues. Invoices for the upcoming year renewals will be sent out mid-November. Please make sure your email address is up-to-date. If you are planning on changing your status from active to retired, please notify our business office.

Laurie Carpenter, Regent- Certification Maintenance, worked very hard this year to make applying for your CMP

credits easier. She simplified our eleven categories of CRM request types to just four categories. We are now offering CMP credits for mentoring CRM candidates. She created a new CMP verification form for validating Category D work related or other requests requiring verification.

Wendy McLain, Regent – Exam Administration and Grading, reported that she is in the process of refreshing the Grader Training module to include the changes to Part 6. She also implemented changes to the grading process. Wendy eliminated the re-grading process. Each exam is graded by two graders and the higher of the two scores is counted. This change allows the candidates to receive their scores up to three weeks earlier than before.

Sharon LaPlant, Regent – Exam Development, reported on the conversion to the 50 point case studies which took place in May. During that test cycle, Part 6 had a 65% pass rate. The Education Development Committee (EDC) has also reviewed more than 200 questions from Part 5. The annotated outline was updated and several college textbooks are being reviewed. Their spring meeting was expanded by one day and includes the review and development of all six exam parts. A fall meeting was held for Part 6 writers only. Fourteen new 50 point case studies were approved this year.

The Alan Andolsen Mentor of the Year award winner for 2014 is Tod Chernikoff, CRM. Congratulations to Tod!

This year we have five members of the Board who have reached the end of their tenure - David McDermott, CRM, FAI, Kiersten Ward, CRM, Sharon LaPlant, CRM, Laurie Carpenter, CRM and Nick De Laurentis, CRM. I would like to thank them for all of their hard work, support, passion and dedication. They have willingly given their time and energy to support the ICRM. Thank you.



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CRM

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TOD CHERNIKOFF WINS ALAN ANDOLSEN AWARD

Tod Chernikoff, CRM, was given the Alan Andolsen Mentor of the Year Award at the recent ICRM Business Meeting in San Diego.

Among the comments submitted in support of Tod were:

- “Mr. Chernikoff participated in the Metropolitan Maryland Chapter (MMD-ARMA) of ARMA International for many years as the Institute of Certified Records Managers (ICRM) liaison.”
- “During this time including this past Spring (2014), Mr. Chernikoff has taught parts of ICRM sponsored workshops at various venues such as the MMD-ARMA Spring Seminar, the joint Capital Chapters Workshop including The Northern Virginia Chapter of ARMA International (NOVA) and the Greater Washington, DC Chapter of ARMA International (GWDC) workshop.”
- “Mr. Chernikoff has continually been available for CRM candidates in group or individual settings in the Washington, DC region. This has been considerable travel at his expense.”
- “Mr. Chernikoff is modest and circumspect in his ICRM activities, entirely justified with the rules and requirements for keeping the test contents a secret. To that end he completely respects the nature and environment of the testing process and remains within an approved scope of what he can reveal in the mentoring process.”
- “He gave me the confidence to pass Part 6 of the ICRM exam. Not only did he provide me with sample essays, but he also provided constructive criticism to improve my responses with regard to content, organization and grammar. Additionally, he gave me his personal view on what he would look for if he was grading the exam, e.g., demonstrating a well-rounded knowledge of the industry and practices, rather than going too deeply into a

topic. He reminded me to answer the questions; this seems simple but really is easy to forget when you are in a timed testing environment. Ultimately, all his feedback and advice paid off because I passed my exam on the first try!”

- “Tod was instrumental in my success passing part 6 on my second attempt. Tod fits all the synonyms for Mentor -- a coach, trainer and counsellor.”
- “I suspect Tod is a Mentor not only to many fortunate CRM candidates as he was for me and to many in his career as a CRM. Tod clearly exemplifies a Mentor through generous giving of his time and talent.”

The ICRM established the Alan Andolsen Mentor of the Year Award at their Spring Board Meeting in April 2011. The award was created to recognize an individual who, in the opinion of the Awards Committee, has contributed significantly to the ICRM by mentoring activities.

Qualification for this award shall be as follows:

- A Certified Records Manager (CRM) in good standing who has contributed significantly to the ICRM and to certification by mentoring activities. These activities should be over a longer than one year period and have impacted more than one individual. Mentoring activities include, but are not limited to the following:
 - Individual mentoring and coaching;
 - Promoting the CRM designation;
 - Teaching/presentation at CRM Prep seminars or other venues;
 - Hosting or contributing to CRM study groups;
 - The committee may take other relevant information into account as well

ICRM SALARY SURVEY RESULTS

<u>Location</u>	<u>Average Minimum</u>	<u>Average Maximum</u>
Canada	\$85,807.26	\$105,806.45
Great Lakes	\$88,889.52	\$109,814.81
International	\$88,649.37	\$110,515.97
Mid-Atlantic	\$105,933.00	\$129,661.02
Midwest	\$80,000.80	\$102,203.39
Northeast	\$86,315.37	\$106,842.11

<u>Location</u>	<u>Average Minimum</u>	<u>Average Maximum</u>
Northwest	\$70,476.86	\$92,857.14
Not Specified	\$92,857.57	\$107,142.86
Pacific	\$93,810.26	\$119,047.62
Southeast	\$77,600.76	\$96,800.00
Southwest	\$88,383.09	\$110,588.24

CRM EXAM GRADING UPDATES

By Wendy McLain, CRM
Regent, Exam Administration & Grading

Following the restructuring Part 6 of the CRM exam from two business cases with a value of 60 points and 40 points to two 50 point business cases, and the change to three CMPs for each exam graded, the Grading Process has now also been revised.

Here is a summary of the changes:

1. Automated assignment of exams to graders
2. Eliminated the re-grading process
3. Each exam is graded by two graders
4. The higher of the two scores is counted
5. Candidates get scores up to three weeks earlier

Some of the changes incorporated automation of the manual process. We now assign exams to graders automatically based on business rules. For example, the earlier a grader volunteers, the more likely they are to be selected to grade. Another "assignment rule" works to ensure that graders receiving more than one exam to grade get the same business case from each candidate so they only have

to get familiar with one question/answer combination.

Other changes were process oriented. We discovered that 25% of all exams were being re-graded in any given cycle. In order to start the re-grading process, we had to first wait for all exams to be graded and then assign exams with scores of 60-69 to be re-graded. Re-graders were given an additional 2 weeks for the re-grading tasks. Now, all exams are assigned to two graders at the beginning of the grading cycle. This eliminates the entire "re-grade" process which gets results back to the candidate much faster.

The grading rubric that the Exam Development Committee provides to graders is very thorough. It helps to remove some of the subjectivity in grading yet leaves room for graders to use their judgment. The new double grading process further reduces subjectivity by giving the Regent more data to ensure consistency among the test scores. If the Regent finds a significant disparity between grader 1 and grader 2, it presents an opportunity to learn why and provide feedback and training to graders.

Updates to the handbook will be available in the future.

DALLAS ARMA CHAPTER HOSTS 2015 SOUTHWEST REGION CRM CONFERENCE APRIL 9-10

The CRM Examination Preparation Workshop will help candidates prepare for the six tests by identifying the core subject matter to study for each Part and to review relevant resources to ensure you develop a successful test taking strategy.

Extend your knowledge and enhance your career by attending the 2015 Southwest Region CRM Conference hosted by the Dallas Chapter of ARMA International.

Cost to attend the CRM Examination Preparation Workshop is \$130.00 for ARMA members and non-ARMA members. Price includes breakfast, lunch, breaks and materials.

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 newsletter_editor@icrm.org. All items must be in MS Word or MS Excel format. Photographs may be in .jpg or .tif format.

For registration and additional details, please visit: <http://www.armsouthwest.org/crm/index.htm>

The Conference will be submitted for Pre-Approved ICRM maintenance credits!

Hotel Accommodations: Springhill Suites by Marriott
1907 N. Lamar Street
Dallas, TX 75202
www.marriott.com/dalwe

Please reference "ARMA" when making reservations.

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 6 months of the activity.

ICRM PRE-APPROVED CMP ACTIVITIES

Date	Title	Type	Credits	Sponsor	Site
12/8	Understanding Electronic Records Storage Technologies	A	1.00	ARMA International	Overland Park, KS
12/9	Electronic Records Management: Basic Concepts and Fundamentals	A	14.00	E-records Institute at IMERGE Consulting	San Diego, CA
12/10	Strategies for Effective E-Mail Management	A	4.00	ARMA Houston	Houston, TX
1/23	Privacy and Confidentiality Issues in Digital Archives	A	7.00	Society of American Archivists	Tucson, AZ
2/20	Privacy and Confidentiality Issues in Digital Archives #1586	A	7.00	Society of American Archivists	Chicago, IL
2/20	Building Advocacy and Support for Digital Archives #1585	A	7.00	Society of American Archivists	Chicago, IL
2/20	Should Your Bucket Have Holes In It? Practical Examination of Big Bucket Records Retention	A	4.00	Alice L. Haltom Educational Fund (ALHEF)	Houston, TX
3/13	Managing Electronic Records in Archives and Special Collections	A	7.00	Society of American Archivists	Fairfax, VA
3/17	Information Confusion -- Where is All of Our Data?	A	6.00	Wyoming ARMA Chapter	Cheyenne, WY
4/15	Avoiding an Information Governance Train Wreck	A	5.00	Nebraska ARMA Chapter	Omaha, NE