

2015 SPRING

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 E-mail: admin@icrm.org

IF YOU HAVE NOT YET PAID YOUR 2015 ICRM DUES, PLEASE DO SO IMMEDIATELY!

FROM THE PRESIDENT...

The ICRM Board of Regents held the spring Board Meeting on May 1st through the 3rd, at Capitol Hill Management Services, the Institute's administrative management firm in Albany, NY.

This was my first in-person Board of Regent's meeting as the ICRM President. I cannot say enough what a great experience it was to work with your fellow CRMs at this level; they are truly an awesome team of dedicated professionals and a great group of people in general.

The better part of the first day was dedicated to the strategic planning process in which we discussed emerging initiatives, tracked progress for goal achievement since the fall Board meeting, action items and final outcomes. We will notify the members and candidates as strategic goals are achieved.

The consent agenda (the consent agenda allows members to vote on a group of non-controversial items *en bloc* without discussion to facilitate a meeting) was adopted last year as the Board meeting process and provides

for greater efficiency in getting through a significant amount of business in a relatively short period of time. The Board of Regents is committed to the principle of transparency in governance. In alignment with this core principle of leadership, all Board Meeting Minutes will be posted to the ICRM website starting with the 2015 spring meeting. The dates of the Board of Regents meetings are now available on the Members-Only side of the website in the Governance section, along with the final, approved minutes. Click on this link <http://www.icrm.org/governance/meetings-and-minutes/> to access the minutes. Governance information will also be referenced with a link in all future issues of *ProfessioNotes*.

Discussions were held concerning the various ways we can leverage and market the Institute's 40th anniversary. The Board of Regents and various

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President Rae Lynn Haliday, CRM

UPCOMING EXAMINATION SCHEDULE

Summer 2015	Winter 2016
Registration Open: May 22-July 30	Registration Open: Nov. 20-Jan. 28
Exam Dates Aug. 3-15	Exam Dates Feb. 1-12
Fall 2015	Spring 2016
Registration Open Aug. 21-Oct. 29	Registration Open Feb. 19-April 28
Exam Dates Nov. 2-13	Exam Dates May 2-13

ICRM LEADERSHIP ROSTER

ICRM Board of Regents

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FROM THE CANDIDATE COACH: PART 6 MENTORING

Over the past decade, we have seen an increase in the demand for the CRM credential. This growth, along with the increased number of exam cycles each year, has increased the demand for mentors. Simply put, we need more mentors! During some of the heavier exam cycles, it

You will receive three Certification Maintenance Credits for each candidate you mentor during a given exam period.

has been challenging to fulfill all mentor requests. For those of you who have served in the past, I extend my appreciation for giving of your time and talents to assist candidates in their progress toward reaching their CRM certification. For those of you

who have not yet served as a mentor, let me answer a few questions you may have, in hopes you may want to participate in this awesome endeavor:

What will be my time commitment and duties as a mentor?

- Most mentors spend 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, provide feedback on one or two practice exams
- Most communication is done over email

What resources are available to help me?

- ICRM Handbook – this resource can be downloaded from the ICRM website
- Practice Exams with answer guide – 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

- Part 6 Study Guide – This guide is designed to give study tips to candidates, as well as providing practice exams and grader instructions

What's in it for me?

- You will receive three Certification Maintenance Credits for each candidate you mentor during a given exam period. To qualify for the credits, you'll need to be registered with the ICRM Mentor Coordinator (me) and provide constructive feedback to the candidate for at least one practice exam.

Frequently Asked Questions:

Q. Can you mentor more than one candidate during an exam period? A. Yes

Q. What if I mentor a candidate for two or more exam periods before passing the exam. Can I receive credit for each exam period? A. You can receive three credits for each exam period, as long as the candidate took a practice exam and you provided constructive feedback to the candidate.

Q. How do I get my credits? Register as a mentor by sending an email to Howard Loos. Please include the candidate's name, their State or Country and the exam period they are planning to take the exam.

If you are interested in volunteering to serve as a mentor, please email me at Howard_Loos@BYU.EDU.

Howard Loos
ICRM Mentor Coordinator

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.

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.

PRESIDENT

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committees were full of great ideas as always; stay tuned for exciting details regarding this year's annual Business Meeting and Reception.

It is my pleasure to announce the Board of Regent's recent approval and official deployment of the new ICRM Business Manager. Steve Golden, CRM, was appointed to this new role for a three-year term effective March 10, 2015. With this recent appointment, the former ICRM Project Manager role, also held by Steve Golden, CRM, was disbanded.

In conjunction with Steve's appointment the Board of Regents has approved and executed specific, contracted deliverables for the remainder of 2015.

This was required to allow priorities of immediate concern to be completed this year with the end goal being this position would become a volunteer role within this first three-year term.

The ICRM Business Manager will function as the point of contact for all vendors procured and under contract with the Institute. At this time, the business manager oversees internal relations and communications as it relates to the management of our vendors and how they interact with the Board of Regents to ensure efficiency and effectiveness in our core operations. The deployment of this role will ensure that our transition to a fully strategic Board operating to the benefit and best interest of the Institute and its membership will be substantiated. It ensures that the changes and reasoning behind moving to a full-service administrative management firm, and the anticipated Return on Investment (ROI), can be realized in an acceptable timeframe. Lastly, the ICRM Business Manager will work to tie process flow initiatives to the strategic planning process.

Please do not hesitate to contact me or any of the ICRM Board of Regents if you have any questions regarding this recent strategic initiative.

See you in D.C. this fall.

Best regards,

Rae Lynn Haliday, CRM
President
Institute of Certified Records Managers

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.

5 TOP THINGS TO IMPROVE YOUR RECORDS MANAGEMENT PROGRAM

By **Ellie Myler, CRM, CBCP,**
Corporate Records Manager

1. Start to see and embrace the “Grey” in things

I know, you are thinking, what in the world, have you lost your mind? Records Management is black and white. There are rules that need to be made and implemented, processes to be followed, and benchmarks to be reached. And after 26 years, I admit, I have my “purist” days when without this there would be fear and loathing in the world of records management. But rules, processes, and benchmarks are generally not interpreted by others to mean the same as they do to us. Rules may mean new or more work for users, processes could be completely different from their accustomed ways of doing things, and benchmarks? In their world, benchmarks are not interesting as usually it means again, more work for them in achieving someone else’s goal of perfection. After taking some change management courses, you start to learn about words like “compromise”, “empathize”, and “support”. While a core set of values and rules are a must to promulgate any kind of governance in anything, be aware that it takes the users of your program to accept and then more importantly use what you are providing. If you have rules, processes, or even benchmarks that somehow are not playing out in reality, remember that you have to focus on what users see, and *then* mold the rules that you have. Following 80/20 is good here in that 80% of your success will typically come from 20% of your users. Therefore, learn to listen more, ask open-ended questions, and form relationships with the users that have to make this happen. By pounding on them with a perfection rule stick, you won’t get the user adoption that you need to make the program work.

2. Market your Program, ALWAYS

Selling is a tough skill to have and not always fun to do. After all, sometimes selling records is like selling a car. You promise that by buying a car, life will be faster, easier, and maybe enjoyable, if you like to drive, but then no sales person will tell you the full story of what it takes to have that car. It is not fun to get one rejection after the other but trust me on this, **don’t take it all so personally**. One of my mentors taught me that and it was hard for me to learn but much easier when I accepted it as a personal truth. Now, selling is just part of the mix. The buyers are naturally going to reject things, and you have to be creative in getting them to change their mind. Easier said than done when you have a product such as ‘Records Management’

to sell rather than that latest sleek Range Rover, shining on the display floor. When you market and sell, you want to provide an “experience” for the user. This can include anything from a full-blown website and records management expo, to a simple brochure, phone call/email, and sometimes just a piece of candy and/or a cup of coffee. Whatever you do, you must. . . .

3. Be passionate about what you do

Don’t be lukewarm, apologetic, or wishy-washy when you communicate with your users. Be happy, brilliant, brief, and gone, unless they ask you to stay, and in that case, why pull up a chair and have a conversation over some coffee. I know, how does one get excited about information governance and then manage to infect others with that enthusiasm? Challenging, but not impossible. Some basics here. Smile, be positive, and always offer to help. No problem is too big to conquer. Listen to them but then pull them out of any of the negativeness or “this is impossible to do”, “don’t you understand how busy I am”, with responses such as “Rome wasn’t built in a day” and “Baby steps are better than no steps”. Always love what you do and even if you are not feeling it, fake it! This leads me to my next important point.....

4. Upgrade your Professional Image

An entire book could be written on this one and I don’t suggest that you run out and buy a pair of designer shoes, but please, learn to dress like a pro. After all, what you wear sends a message to your audience and you do want to be seen as a person that knows their stuff. Wearing jeans and flip flops on casual Friday will probably not be harmful, but you can dress up those jeans and now be casual chic and take a meeting that was not planned and not feel like you are at the beach. A fully donned suit is probably not a necessity for every day but have it in your closet so that when you have that big meeting with the super executives, you look like you belong at the table. Dressing is part of the song and dance and if you need to consult with a stylist to get a professional wardrobe, do it. Even if you go from hauling boxes to meeting with a group to talk about their imaging process all in one day, you will feel better when you are dressed in a way that sends a message of “I am a professional in this business” and not “Janitor of records”. And while you are prancing around in those Jimmy Choos, be sure to continue....

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IMPROVE

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5. Learning

Being a lifelong learner is a good thing, especially when dressing up the records management pig can seem like a life-long chore to sell it to the people who need it and don't want it the most. If you stop learning, you stop being curious, and then it is harder to come up with new approaches to age-old problems. Learning can include so many things but consider learning about a new but related field. Disaster recovery is all about what to do when things go wrong, but teaches you how to look forward in a situation, make plans, test, and then evaluate how the whole thing went. Learning can also be completely non-professional. Say you have always wanted to learn how to knit or fix a car. That can teach you rolling up your sleeves for a big project, being patient, and looking forward to the end results. The point is, don't ever stop learning. Learning will help you to grow beyond what you thought you were capable of and will help your profession in terms of distributing that knowledge to others who are new in the field. It is good to become a pro at something but sometimes learning something that you know nothing about, will help you get out of what you do know and into a something you have to work at knowing. By learning, you are helping your mind get out of the "I have always done it this way" to "Gee, these new *Feng Shui* techniques will help me to harmonize all those little piggies in ways I had never imagined".

Disclaimer: *This article was presented as part of the 2015 ARMA Houston Armadillo Newsletter. The content presented in this document is for informational purposes only. The opinions expressed in this document and those of the presenter do not necessarily represent the official position of CITGO. References to other resources including links are for informational purposes only. Providing these links does not necessarily indicate CITGO support or endorsement of the site/s. CITGO is not responsible for the content or accessibility of any of the links or resources listed.*

Ellie Maier is the Corporate Records Manager for CITGO Petroleum Corporation. She has been in the field for 26 years and has published articles and received the "2007 Britt Literary Award" from ARMA International. She is a Certified Records Manager, Certified Business Continuity Professional and holds a Change Management certification. She currently serves as the ICRM Committee Manager for the Houston ARMA Chapter and leads CRM workshops, discussions, and study groups.

NEW CRMs FROM FEBRUARY 2015 EXAM CYCLE

PLEASE WELCOME OUR NEWEST CRMs

Kathy R. Clark, CRM
Plain City, OH

Robert N. Cleveland, CRM
Bakersfield, CA

Robert W. Duncan, CRM,
Wheaton, IL

Theresa L. Evenson, CRM
Westminster, CO

Susan M. Gleason, CRM
Shelton, CT

Mark A. Grysiuk, CRM
Etobicoke, ON, Canada

Jessica G. Harman, CRM
Bartlesville, OK

James Havens, CRM
Normal, IL

Danielle L. Hontz, CRM
Chicago, IL

Joseph J. Lutz Jr, CRM
King of Prussia, PA

Murali K. Shanmugasundaram, CRM
Houston, TX

Paul N. Simonoff, CRM
Washington, DC

Courtney M. Stone, CRM
League City, TX

John M. Wiesinger, CRM
Whitefish Bay, WI

Ryan M. Zilm, CRM
The Woodlands, TX

ICRM PRE-APPROVED CMP ACTIVITIES

Date	Title	Type	Credits	Sponsor	Site
6/1	Developing Specifications and RFPs for Recordkeeping Systems	A	6.5	Society of American Archivists	Atlanta, GA
6/8	Copyright Issues for Digital Archives	A	6.5	Society of American Archivists	Anchorage, AK
6/9	Management Electronic Records in Archives and Special Collections	A	6.5	Society of American Archivists	Anchorage, AK
6/10	Digital Forensics Foundational	A	6.5	Society of American Archivists	Anchorage, AK
6/11	Arrangement and Description of Electronic Records, Part I and II	A	13.0	Society of American Archivists	Chapel Hill, NC
6/11	Digital Forensics: Advanced	A	13.0	Society of American Archivists	Anchorage, AK
6/12	IGI Boot Camp: Getting IG (Information Governance) Off the Ground	A	5.5	WCO ARMA	Grand Junction, CO
6/17	ASAP FOIA-Privacy Act Training Workshop - West	A	12.5	ASAP	Denver, CO
6/23	Arrangement and Description of Electronic Records, Part I and II	A	13.0	Society of American Archivists	Houston, TX
6/26	Managing Electronic Records in Archives and Special Collections	A	6.5	Society of American Archivists	Austin, TX
6/30	Lost, Stolen or Compromised Medical Records: Reporting, Restoration and Recovery	A	1.5	Lorman Education Services	Eau Claire, WI
7/22	Get in Tune with Archives & Records Management	A	12	NAGARA/CoSA	Austin, TX
8/27	Digital Forensics: Fundamentals	A	6.5	Society of American Archivists	Sacramento, CA
9/9	2015 ASAP FOIA/Privacy Act Training Workshop	A	15	ASAP	Chicago, IL
9/17	Arrangement and Description of Electronic Records, Part I and II	A	13	Society of American Archivists	Austin, TX
9/18	Appraisal of Electronic Records	A	5.5	Society of American Archivists	Milwaukee, WI



It is your **life**. It is your **career**. It is your **certification**.

CRM

In a business world of doing "more with less," your designation as a Certified Records Manager shows that you understand the many facets of the RIM profession.

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

In a business world in which new jobs are increasingly competitive, your designation as a Certified Records Manager (CRM) demonstrates that you have the experience and expertise to lead change and deploy best practices as they evolve in the RIM profession.

For more information about becoming a Certified Records Manager, contact (518) 694-5362 or visit www.icrm.org

