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Hello, and welcome to the newest edition of *ProfessioNotes*! What a great new look we are unveiling to carry us into the New Year.

As many of you witnessed at our Annual Business meeting in October, we are implementing a newly created logo for the ICRM. This made quite a positive impression on the CRMs and guests in attendance at the Annual Business meeting. I, personally, have been offered many compliments for the hard work that our volunteer CRMs on the Marketing Committee and the Board of Regents put into the process of updating our logo; thanks to all who had a hand in this initiative. In addition to my comments at the Annual Business meeting, we are also in the process of updating our filing with the United States Patent and Trademark Office for registering the new logo.



We have released a couple of articles on some changes in our by-laws and election process we have made throughout the year; effective January 2010, we have eliminated the Senior Advisor role on the Board of Regents and have established a three-year leadership escalation, whereby we will elect a President-Elect annually who will serve a year in that role, graduate to President and then to Chairman of the Board. Under this new governance, the Chairman will vote only in the event of a tie.

I'd be remiss if I didn't appropriately frame this article with a note about Alan Andolsen, our President. Alan has taken a leave from his duties on the Board due to illness. We wish Alan all the best and thank him for his time as President of the ICRM Board of Regents. As we move to the New Year, we will reinstitute the President's Message in each and every edition of *ProfessioNotes* to ensure the membership is kept up to date on all activities of the Institute. I'll look forward to writing my first column as President in the Winter of 2010. Until then, please take notice of our new brand and help us continue to improve our newsletter with suggestions and submissions.

Happy Reading!

Steve
Steve Golden, CRM
Vice President
ICRM Board of Regents

2009 Emmett Leahy Award Recipient Announced

Charles Dollar, Committee Chair



Orlando, Florida October 14, 2009.

The Emmett Leahy Award Committee is pleased to announce that on October 14, 2009 **Mariella Guercio** received the 39th Emmett Leahy Award for Outstanding Contributions to the Information and Records Management Profession at the Annual Business Meeting of the Institute of Certified Records Managers.



Named after Emmett J. Leahy, the Emmett Leahy Award is presented annually to recognize an individual whose contributions and outstanding accomplishments have had a significant impact on the records and information management profession. The Emmett Leahy Award is differentiated from other awards in the information and records management profession in that

an awardee's individual contributions must have moved the profession in a significant direction it would not have otherwise moved without the awardee's direct, personal contribution. Other awards recognize contributions such as membership in a professional organization, demonstration of industry service, authorship of papers and presentations which are all commendable and meritorious. In the case of the Emmett Leahy Award these are not necessarily a threshold requirement for Emmett Leahy Award consideration.

The Emmett Leahy Award Committee selected Mariella Guercio as the 39th recipient of the Emmett Leahy Award because of the impact her work has had on the management and preservation of electronic records. Currently the Chair of the Master of Records Management and Archival Science Program, Vice President Technology, and Provost at the University of Urbino, Italy, Guercio has had a major impact on records and information management in Italy, Europe, and around the world:

- Over the past decade and a half she developed innovative records systems for organizations in the public and private sectors, from banks to utility companies, and from regional and city administrations to insurance companies.
- In 2000, while serving on an Italian Parliamentary Committee drafting legislation regulating public offices, she persuaded the Committee to include in the legislation a requirement to establish a records management office, staffed by a records management professional with graduate education in records and archives management, in each department of every level of government. This requirement has had a profound effect on professional records managers and the institutions they serve.
- In 2003 Guercio designed and developed an entire graduate level program on Electronic Records Management and Preservation that is delivered by four universities, and was adopted by the European Commission as the foundation of a European Master's Program in Electronic Records Management and Preservation.
- Since 1999 Guercio has delivered records management training to more than 2800 records managers, archivists, and administrators through continuing education courses along with presenting courses on archival science, records management, digital preservation, and archival description to more than five hundred graduate students while directing more than 70 graduate theses on life cycle records and information management.

Guercio's impact on the records and information management profession extends far beyond Italy. Her records and information management skills, knowledge, and experience have been manifested in a number of different domains.

- As one of the six subject matter experts who participated in the drafting of Model Requirements for Electronic Records Management (MoReq 1 and 2) for the European Commission, she is widely recognized as having been the seminal thought leader in framing these requirements.
- She has had a leading role in influencing the European Union Cultural Affairs Committee and the Forum for Information Society to incorporate records management and preservation of electronic records into their programs.
- She has been a co-director of digital preservation projects for the European Commission Electronic Research, Preservation and Access Networks (ERPANET) and the European Union Cultural, Artistic, and Scientific Knowledge for Preservation, Access, and Retrieval (CASPAR). The latter is intended to establish a digital preservation infrastructure for Europe.
- She has shared her knowledge, skill, and experience in records and information management around the world through workshops, presentations, and lectures on records management and the preservation of digital records. In addition, she has published three books and numerous articles in scholarly and professional journals on records management, archival education, and electronic records preservation.

A recurring theme in Guercio's highly visible academic, public, and private records and information management endeavors has been an emphasis on the responsibility of records professionals to articulate to the citizenry at large and to those who govern that accountability and transparency, democracy and justice depend on good records, which in turn require a highly educated community of trusted professionals to manage these records throughout their life cycle. This is a global emphasis that has no geographic or political boundaries.

About the Emmett Leahy Award

The Emmett Leahy Award is the highest award for individual accomplishment in the information and records management profession. Given in honor of Emmett Leahy, the renowned and legendary pioneer of information and records management, this award annually recognizes an individual whose contributions and outstanding accomplishments have had a major impact on the records and information management profession. Selection of the award recipient is made by the Emmett Leahy Award Committee that is composed of the last ten winners of this prestigious award. The Emmett Leahy Award is presented at the annual meeting of the Institute of Certified Records Managers that is held concurrently with the ARMA International Annual Conference. Past winners have included users, educators, archivists, records managers, and consultants -both within the United States and internationally. The expenses of the Emmett Leahy Award Committee are underwritten by the Huron Consulting Group as part of its commitment to promoting and recognizing excellence in records management.

The Emmett Leahy Award Committee is an independent entity and is not a part of the Institute of Certified Records Managers, ARMA International, or Huron Consulting Group. The selection of the annual Emmett Leahy Award recipient is the exclusive responsibility of the Emmett Leahy Award Committee.

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Call For Newsletter Articles & Information

The ICRM newsletter provides for a primary communication tool between the Board of Regents, its standing committees and the membership and as a source for information relevant to its core mission, vision, values.

If you would like to submit a professional article, recommendation or have additional information that you feel would be appropriate for the Newsletter, please contact me at recordspro@comcast.net, lbuss@usbr.gov or by phone at (303) 579-8065.

Deadline to submit articles is December 31, 2009 for the winter issue.

Volunteers Needed

New Project To Develop A RIM Standard

The ARMA International Standards Development Program is recruiting volunteers to work on an exciting new project to develop an American National Standard entitled "Implications of Web-Based Technologies in Records Management". This publication will provide guidance to RIM professionals and foster adherence to generally accepted recordkeeping principles. Examples of Web-based technologies will be discussed and will include wikis, blogs, miniblogs, mashups, classification sites, and social networking sites. This publication will address policies, procedures, change management, training, technology, and metadata as related to RIM best practices and the use of Web-based technologies.

To learn more and to submit your application, visit <http://www.arma.org/standards/development/standardsprogress.cfm> then use the drop-down menu to select the project by title.

If you have questions about the Standards Development Program or any of its projects, you may email standards@armaintl.org.

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.

Report, Regent for Exam Administration

Rayanne Waggoner, CRM

Effective January 1, 2006, the period for completing all six parts of the ICRM exam is limited to five years after the candidate is approved. Candidates approved prior to January 1, 2006 have until January 1, 2011 to pass all six parts of the exam. If all six parts are not completed by this date, the candidate must pay a reactivation fee and restart taking all exams, regardless of when previously taken parts were passed. That deadline is quickly approaching.

However, with the transition to a 3rd party test provider, Pearson VUE, the number of exam cycles has been increased to 4 times each year. The exam cycles are the first full week of February, May, August and November. Parts 1 – 5 are available during the entire test cycle. Part 6 is still only given on the Thursday of each exam cycle. You still have four more opportunities pass these exams.

As more and more employers are looking for candidates with the CRM designation, don't let this opportunity slip away. You've already invested in applying to become a candidate and taking some exams. Now is the time to complete the cycle.

**January 1, 2011
is a very important date!**

Registration for the February 2010 exams opens on November 18, 2009 and closes on January 28, 2010.

Do you have questions about how register for the exams? There is a registration tutorial on the ICRM website that can lead you through the process.

Please remember that many organizations use Pearson VUE as their test provider. The sooner you register and schedule your exams, the better your chances of being able to select a day, time, and location that works best for you. Should you encounter problems

in locating a time or location for testing, please contact the Regent for Exam Administration who can work with Pearson VUE to find a solution.

ICRM 2010 Examination Schedule

Winter 2010 Exams

Parts 1-5, February 1-5, 2010
Part 6, February 4, 2010

Spring 2010 Exams

Parts 1-5, May 3-7, 2010
Part 6, May 6, 2010

Summer 2010 Exams:

Parts 1-5, August 2-6, 2010
Part 6, August 5, 2010

Fall 2010 Exams:

Parts 1-5, November 1-5, 2010
Part 6, November 4, 2010

Winter 2010

Exam Registration
November 18 – January 28, 2010

Spring 2010

Exam Registration
February 17 – April 29, 2010

Summer 2010

Exam Registration
May 19 – July 29, 2010

Fall 2010

Exam Registration
August 20 – October 28, 2010

Editorial Policy

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

Information Lifecycle Management A Novel Approach in Information Management or Records Management Reinvented?

*Karl P. Zoekler, CRM
Information Lifecycle Management
Morgan Stanley, New York, NY*

The concept of Information Lifecycle Management (ILM) has been growing in popularity in recent history in corporate programs, government, and by vendors. But what is ILM and how is it different from Records Management? The concept of lifecycle as applied to records and information management is certainly not a new idea. Although the lifecycle has been a central concept of Records Managers, Archivists, particularly outside of North America, have put credence on the records continuum model that looks at records from a space/time perspective. The lifecycle concept borrows from biology, where the phases of birth, infancy, juvenility, and adulthood eventually lead to reproduction and the creation of new life. Information does not really follow a life cycle, since the maturity of records does not lead to the creation of new records. Rather, it follows a linear path (lifespan) of phases and processes, starting with creation, active use, inactive storage and disposition (transfer, destruction or permanent status). At any time until destruction occurs, a record may be retrieved, so I don't see that as a phase as depicted by some lifecycle diagrams. Records are characterized and treated differently in each phase. Records can also be repurposed, killed in the draft stage, or pulled from inactive storage to become active again, thus requiring backflows and outflows from the cycle. So the lifespan is not just a one way street.

Wikipedia defines Information Lifecycle Management as, "a comprehensive approach to managing the flow of an information system's data and associated metadata from creation and initial storage to the time when it becomes obsolete and is deleted." The Storage Network Industry Association (SNIA) defined ILM in somewhat broader terms as, "Information Lifecycle Management comprises the policies, processes, practices, and tools used to align the business value of information with the most appropriate and cost effective IT infrastructure from the

time information is conceived through its final disposition." While the references to the birth to death coverage are consistent, the SNIA definition introduces an emphasis on policy, tools and cost effectiveness. The emphasis on cost effectiveness is very timely and appealing in the current economy.

Wikipedia defines Records Management as, "the practice of maintaining the records of an organization from the time they are created up to their eventual disposal. This may include classifying, storing, securing, and destruction (or in some cases, archival preservation) of records." Again we find a preponderance of the lifecycle concept so how does

...a comprehensive approach
to managing the flow of an
information system's data and
associated metadata from
creation and initial storage
to the time when it becomes
obsolete and is deleted...

ILM distinguish itself from Records Management? Before we go any further, you should know that I may have a certain prejudice here, having spent the overwhelming majority of my career working as a records manager and only the last two and a half years working in ILM. I can not help but perceive that ILM is just a sexier repackaging of Records Management. And tell me if this sounds familiar, "ILM is all about six rights: having the right information (data) in the right place at the right time, for the right duration, with the right level of

protection, and the right level of accessibility." The ILM tag line adds duration, protection and accessibility to this age old records management adage.

An ILM program is a tempting remedy for an underperforming RM program, one that just couldn't get out from under the pile of physical records, or one that couldn't get budget or get the attention it needed from upper management. The new strategy promises to aggressively dispose of records and to be more tech savvy. ILM embedded in IT tends to approach records management from the system side, determining what systems are producing the records and building plans to provide disposition capability from the point of creation. Potential time

bombs like the long term retention of back-up tapes are more likely to be addressed by a tech-oriented function. Other actions controlled by IT such as decommissioning of user drives of departed employees, and deletion of inactive electronic repositories may come under ILM control. ILM is very focused on storage and in its earliest manifestations seemed to be only concerned with the end-of-life phase of records. Statements such as, "ILM represents a major shift in the approach towards creating and managing a storage infrastructure and the data it maintains"³, underscore this view of ILM.

Vendors have readily adopted the ILM moniker. They are, of course, always looking for a more marketable approach to information management. We've especially seen this around records/document/content management systems over the years. SUN Microsystems, IBM, EMC², and Revivio have been working together since 2004 and collaborating with ARMA, to establish standards and terminology for ILM. Oracle, OpenText, Computer Associates and Iron Mountain have also been active in marketing ILM. Storage vendors are promoting ILM as a set of analysis, technologies, and methods that optimize and potentially automate the flow of data through the lifecycle. This includes rules to migrate data to lower cost storage, or compliant storage, e.g., WORM, at the appropriate time; de-duplicate and ultimately purge data⁴. The dependency on backup tapes for storage can be mitigated, so that backups are for recovery only. Compliance is a major driver for applying ILM (as well as for RM) and vendors are pushing ILM as a part of solutions suites and consulting, especially for SOX and HIPPA.

Since ILM is the more IT oriented version of Records Management, it is reasonable to ask if the IT organization can be trusted to get it right. A Cohasset Associates survey in 2002 asked, "Do you believe that IT in your organization really understands the concept of life-cycle regarding the management of electronic records?" It was surprising that 73% said they did *not* believe IT understood the life-cycle concept. Given that, ILM programs really need to include Records Management professions to bring the knowledge of lifecycle management and credibility to the program.

It could be argued that most Records Management as well as ILM programs don't fully leverage the lifecycle concept in that they are primarily focused on end of lifecycle and disposition. Increasing maturity levels of these programs trend towards managing records earlier in the cycle, in the active and creation phases as well. There are many ways that RM and ILM can apply management practices to the creation phase, including forms design, style manuals, and authoring policies. Because so much data, information and records are generated from applications, it makes sense to apply records management principles at the application level. Recently reported statistics from HP

indicate that as much as 61% of all new electronic records are being generated from applications, 28% email and 11% from files (Word, Excel, desktop/office software). ILM programs are targeting applications as the starting point for control of records. The assessment of applications can determine what type of information is being generated and appropriate RM functions can then be applied. Information can be tagged for records classification and information security at the beginning of its lifecycle to ensure proper compliance and retention throughout its lifecycle.

A fundamental concept that has separated Records Management from Information Management has been the very definition of records as specific objects of proprietary preservation-worthy information. ILM may be more open to a broader application of concepts that include the management of data and information as well as records. Unfortunately, if an ILM program is using a *records* retention schedule, there are inherent difficulties with data classification. As data are the building blocks of records, data can be combined in different ways under different contexts, and become different records.

Information Lifecycle Management may not be a Records Management program on steroids, but it does bring some novel approaches to the business practices Records Managers know and love. It is the fundamentals of Records Management: compliance, policies & procedures, classification, indexing, storage & retrieval, preservation, and disposition that form the basis for ILM. Without these, ILM would be technology without policy.

1. Upward, Frank, Structuring the Records Continuum - Part One: Postcustodial Principles and Properties, Archives and Manuscripts, vol. 24, no. 2, 1996, pp. 268-285
2. Fitzgerald, Jim, Information Lifecycle Management: It's Logical, Maybe, JJWild
3. Harwood, Mike, Storage Basics: Information Lifecycle Management, internet.com
4. Duplessie, Steve, et al, The New Buzzwords: Information Lifecycle Management, ComputerWorld, March 31, 2003

The opinions expressed in this article are those of the author and do not reflect the position of the Connecticut Chapter of ARMA or ARMA International. Reprinted with permission from the Author and ARMA International.

How to Contact the ICRM

The Institute of Certified Records Managers (ICRM) is a certifying body established to develop and administer a certification program for professional records managers. Contact information for the ICRM is as follows:

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North Syracuse, NY 13212
Telephone: 877-244-3128
(Toll-free USA and Canada)

Alternate Telephone:

315-234-1904
Fax: 315-474-1784
Website: www.ICRM.org

ICRM Membership Decertifications

The Board of Regents have approved decertification of the following CRMs for non-payment of dues:

CRM Active

Leah K. Cothorn, Richard D. Reilly,

CRM Retired

Dorothy George, Charles W. Hughes, James L. Langford, John F. Prette;

The Board of Regents have accepted the resignation of certification from the following CRMs:

CRM Active

Dean Dawson, Thomas Love, Dawn J. Presler

CRM Retired

Allison Combs, Blaine Hardesty, William E. McCaffrey, Diane Nolden

Failure to meet the Certification Maintenance Requirements for the CMP cycle

Edwin Hopkins, Laretta Stanley

The Election Results are in!

Please join me in congratulating the following elected ICRM Board of Regent members serving two-year terms to begin January 1, 2010:

Regent, Exam Administration:

Mimi Dionne, CRM, CA, PMP, CDIA+

Regent, Legislation and Appeals:

David McDermott, CRM

Regent, Public Relations and Professional Development:

Rae Lynn Haliday, MBA, CRM

Also, in keeping with the recent change to the ICRM by-laws, the following will serve one-year terms to begin January 1, 2010:

President Elect:

Debra Gearhart, CRM, FAI will serve one year.

Afterwards she will become President for one year, then Chair for one year.

President:

Steve Golden, CRM, will serve one year. Afterward he will become Chair for one year.

Chair:

Alan Andolsen, CMC, CRM, will serve one year.

A special thank you to Juanita Skillman, CRM, for chairing the election committee. We had the best voter turnout ever - 38%!

Martha Adcox, CRM

Secretary, ICRM Board of Regents

ICRM Mission Statement

- Develop and administer a certification program for professional records and information managers
- Program includes examination development, administration and certification maintenance
- Assist professional records managers in attaining recognition of their competencies
- Identify current RIM body of knowledge necessary to ensure certification has value
- Establish eligibility standards for those RIM professionals wishing to attain certification
- Promote the value of certification to the private sector and government
- Develop and maintain outreach programs to ensure the Institute remains viable and is meeting the ever-changing needs of the profession, the Institute, and its members

Newsletter Publishing Schedule

ProfessioNotes is published four times a year (Winter, Spring, Summer and Fall) by the ICRM. Articles, inquiries, letters to the editor, or other comments should be directed to:

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Dues

Beginning with the 2010 dues cycle, the ICRM will be sending dues invoices via email to our members.

The 2010 annual dues invoices will be sent out mid-November, with payment due by January 30, 2010. No one likes to lose their designation because of non-payment of dues after working so hard to acquire it. PLEASE be sure your ICRM database profile includes your current email address before November 15.

If you do not receive your dues invoice by the end of November, please contact the Syracuse office at admin@icrm.org or call 877-244-3128 or 315-234-1904. If, for some reason, you do not have an email address, please contact our Syracuse office so they can arrange for you to receive your invoice via postal mail.

Once you receive your invoice, it can be paid online using Visa, Master Card, or American Express, or by mailing a check to the ICRM.

Virginia A. Jones, CRM, FAI

Treasurer, Institute of Certified Records Managers
vjones@nngov.com

NIRMA Update

Submitted by Peggy Warner, CRM/NS

The Nuclear Information and Records Management Association (NIRMA) annual conference was held in Summerlin, Nevada August 9-12.

We are proud to announce that three CRM and NIRMA qualified candidates sat for the ICRM/NIRMA advanced Certified Records Manager (CRM) Part 7 Nuclear Information and Records Specialist (NS) examination. All three passed the examination and received their certificate during the awards presentation. The successful candidates were:

Caryn Gates

Bettie Moore

Susan Ziehm

Presenting the awards were Don Schewe, ICRM representative, Steve Adams, NIRMA President, and Peggy Warner, NIRMA Director-Professional Development Business Unit.



(left to right: Steve Adams, Susan Ziehm, Peggy Warner, Caryn Gates, Don Schewe, and Bettie Moore)

In attendance at the conference were nine of the individuals who hold the Nuclear Information and Records Specialist (NS) advanced ICRM certification.



(left to right: Susan Ziehm, Caryn Gates, Steve Adams, Peggy Warner, Joe Chrostowski, Christy Collier, Bettie Moore, Carolyn Roberts, and Cheri Susner)

Highest NIRMA honor awarded

Cheri Susner, CRM/NS, Exelon Generation Company Braidwood Nuclear Station, was awarded the honor of "Lifetime Member". The following is taken with permission from the "Inside Nuclear-news for the employees of Braidwood Generating Station" August 26, 2009 issue.

To say that Cheri Susner has a passion for records management may be a bit of an understatement. Her commitment recently was recognized as she was awarded a Lifetime Achievement Award and granted lifetime membership to the Nuclear Information and Records Management Association (NIRMA). "Cheri epitomizes what it means to be NIRMA - mentoring and encouraging others, challenging herself and others, asking questions, offering ideas, being available, and always ready to help," said NIRMA President Steve Adams. A NIRMA member since 1994, Susner worked in the Records Management department at both corporate and Braidwood for 16 years before recently transitioning to Business Operations at Braidwood. Following her election to NIRMA's Board of Directors in 2004, Susner held various leadership positions, including Secretary, Vice President and President. Her dedication and experience prompted positive changes in NIRMA's processes, membership, mission and direction. "I was shocked, humbled and honored to receive this award," Susner said. "To be recognized by your peers is amazing. You start out volunteering, whether in a professional organization or in your community and you don't expect recognition - but when and if it happens -- it's really overwhelming."

"I want to congratulate Cheri on this great accomplishment," said Braidwood Station Site Vice President, Amir Shahkarami. "We are very proud of her and happy to have her as a member of the Braidwood team. Her experience with records management and NIRMA will be very beneficial in her new position."

New Director for the Professional Development Business Unit (PDBU)

Peggy Warner has handed the reigns of leadership over to:

Anita Beren, Director
Shaw Power Group
anita.beren@shawgrp.com

Cheri Susner, CRM/NS
Chair, Professional Certification Committee (PCC)
Exelon Generation Company
cheryl.susner@exeloncorp.com

PDF/A Position Paper

The Regulations & Information Management Business Unit (RIMBU) has the following position paper for NIRMA members.

Nuclear Information and Records Management Association (NIRMA)

Position Paper

THE USE OF PDF/A TO SUPPORT THE MANAGEMENT OF QUALITY RECORDS ON ELECTRONIC MEDIA

Abstract

This document endorses the use of the ISO 19005 PDF/A standard as a sustainable file format for use in the nuclear industry. It provides additional information for consideration in its use for site quality records and includes standardizing settings to meet the U.S. Nuclear Regulatory Committee (NRC) submittal requirements.

To view the position paper and learn more about NIRMA, go to <http://nirma.org/default.aspx>.

New CRMs

August 2009

Elizabeth W. Adkins, CRM
Falls Creek, VA

Julie J. Colgan, CRM
Columbia, SC

Giovanna Ertel, CRM
Bowie, MD

Herbert W. Foster, Jr, CRM
Franklin, WI

Sue S. Gerrity, CRM
Farmington Hills, MI

Carolina R. Jordan, CRM
Fayetteville, GA

Kathy S. Mann, CRM
Birmingham, AL

Jennifer D. Sutherland, CRM
San Deigo, CA

Lourdes Sy-Rodriguez, CRM
Burbank, CA

Jesse L. Wilkins, CRM
Denver, CO

ICRM Pre-Approved CMP Activities

Activity Date	Activity	Credit Hours	Sponsor
04/14/2010	Nebraska Chapter of ARMA Spring Seminar 2010	5.50	Nebraska Chapter of ARMA International
03/25/2010	Medical Records Law in Michigan - Traverse City	6.00	Lorman Education Services
03/23/2010	Medical Records Law in Pennsylvania - Harrisburg	6.00	Lorman Education Services
03/18/2010	Document Retention and Destruction in Iowa - Des Moines	6.50	Lorman Education Services
03/18/2010	Medical Records Law in West Virginia - Charleston	6.00	Lorman Education Services
03/17/2010	Document Retention and Destruction in Arkansas - Little Rock	4.00	Lorman Education Services
03/09/2010	Wyoming Chapter of ARMA Annual Seminar	6.00	Wyoming Chapter of ARMA
03/03/2010	Medical Records Law in Arkansas - Little Rock	6.00	Lorman Education Services
02/24/2010	AIIM Electronic Records Management ERM Practitioner Course - ARMA NOVA Chapter - Arlington	6.50	AIIM
02/24/2010	Document Retention and Destruction in Hawaii - Honolulu	6.50	Lorman Education Services
02/16/2010	Medical Records Law in South Carolina - Charleston	6.00	Lorman Education Services
02/03/2010	Document Retention and Destruction in Louisiana - Baton Rouge	6.50	Lorman Education Services
02/02/2010	Medical Records Law in Illinois - Tinley Park	6.00	Lorman Education Services
02/02/2010	What You Need to Know About Public Records and Open Meetings in Illinois - Naperville	6.00	Lorman Education Services
01/29/2010	Medical Records Law in Mississippi - Jackson	6.00	Lorman Education Services
01/27/2010	Document Retention and Destruction in Michigan - Lansing	6.50	Lorman Education Services
01/26/2010	Document Retention and Destruction in Massachusetts - Worcester	6.50	Lorman Education Services
12/08/2009	Medical Records Law in Michigan - Detroit	6.00	Lorman Education Services

Report, Regent for Public Relations and Professional Development

Rae Lynn Haliday, MBA, CRM

Dear ICRM Members,

It has been an exciting year for the Institute with many positive changes. I would like to take this opportunity to thank all of the members of the ICRM Marketing Committee for their contributions on the various projects completed this year:

Peter Kurilecz, CRM, CA

Mary Hilliard, CRM

Ginny Webster, CRM

Tom Wilson, CRM

Kathy Adair, CRM

Jeff Randolph

Mimi Dionne, CA, CRM, PMP, CDIA+

Deb Gearhart, CRM, FAI

Steve Golden, CRM

Bruce White, CRM, PMP

Former members:

Kenneth Hopkins and **Bill Morey**, CRM

I would also like to thank Amy Niedbalski, MBA, Audience Research Coordinator for the Saint Louis Zoo, for her support and expertise in developing the 2009 ICRM Marketing and Branding Survey.

I enjoyed seeing many of you at the ARMA Conference in Orlando, and in particular at the Annual Business Meeting and Reception, where we unveiled the new ICRM logo recently approved by the ICRM Marketing Committee and Board of Regents. We have applied to have the logo trademarked and hope to have this process concluded by the end of the year.

Background on Logo Design

To provide the general membership with some background on how we approached the design process for the logo; we hired Greg Linton of 2 Times Design, a marketing and branding strategist, to help develop some potential logos using market research and the results of the 2009 Marketing and Branding Survey. The designs were presented to the Marketing Committee who voted and made a specific recommendation to the Board of Regents. Many thanks to Greg for his consultation and work supporting the new branding strategy and Marketing Plan for the ICRM.



Amy Niedbalski



Greg Linton

The Survey included general questions to CRMs and CRM Candidates regarding the certification and then specific sections as follows:

- Exam Preparation Workshops
- Professional resources, learning methods and delivery
- CRM Special Designation Program
- CRM logo, newsletter and website
- Perceptions, marketing and awareness of the credential
- Demographics and classification

We will continue to address all areas where changes or enhancements are needed as a result of the implementation of the ICRM Marketing Plan, and in conjunction with member preferences conveyed through the 2009 Survey results. Additional surveys will be distributed as needed.

Highlights from the 2009 ICRM Marketing and Branding Survey are including at the end of this report. Following are the reactions that our marketing expert has gleaned from the results of the survey:

I. ICRM/CRM Certification Awareness

- a. ICRM Awareness. ARMA International (either generically or as part of the Annual Conference & Expo) is responsible for the clear majority of CRM awareness. Based on the survey results, we can do a better job of pre-qualifying prospects and building more awareness within our ranks.

2. Communications Strategy

- a. ICRM Website audience focus. Revise ICRM site communications. The ICRM site needs to have some thought put into audience segmentation. Who is the site for – current CRMs or future CRMs? Can both groups walk through a site visit and get where they need to go with all of their questions answered. Consider segregating newsletter and website communications between the two target audiences. And in the case of the CRM prospect, do they know what steps to take next. Is there an adequate feedback system in place where live prospects can get into the funnel, even though they may not be ready to take the exam – a “keep me posted for the future, but don’t treat me as an immediate candidate” option.
- b. ICRM Newsletter: 2 versions. With the same eye toward audience segmentation, your newsletter communications can be more effective if they were targeted to better serve your diverse audience. Specifically, targeting your CRM audience with their own messages and targeting your candidates / “keep me posted” group differently.



Rae Lynn Haliday Haliday, CRM and Bruce Walters, CRM presenting at CRM Examination Preparation Workshop hosted by the Zoological Registrars Association (ZRA) in Boise, Idaho on October 23, 2009

3. Demographics

- a. This survey corroborates evidence collected by affiliated associations on their membership. Collectively, professional associations are facing an aging demographic. The key to addressing this issue will be achieved through awareness efforts, cultivation of younger professionals, and attempting to address our changing member needs (career advancement tools, Self-Assessment, peer networking, etc.) as a way to combat the trend.

2009 ICRM Marketing and Branding Survey Results

Sample Size

- 411 CRMs and 175 Candidates responded to the Survey

Respondents

- 28% of the CRM respondents have held the credential at least ten but less than 20 years
- 27% of the CRM respondents have held the credential at least one year but less than five years

Awareness

- 72% of the CRMs and 73% of CRM Candidate respondents learned about the credential as a result of ARMA colleagues
- 27% of the CRMs and 26% of CRM Candidate respondents learned about the credential while attending an ARMA conference

Examination Preparation

- 84% of CRMs and 68% of CRM Candidate respondents believe that Workshops helped them prepare for the CRM exams

Where CRMs and CRM Candidate respondents most want to attend CRM Examination Preparation Workshops

- 39% of CRMs and 52% of CRM Candidate respondents
 - Local ARMA Chapter
- 24% of CRMs and 40% of CRM Candidate respondents
 - Other Association or ARMA Chapter
- 22% of CRMs and 51% of CRM Candidate respondents
 - Webinars
- 22% of CRMs and 15% of CRM Candidate respondents
 - ARMA Conference General Sessions

Awareness of ICRM Special Designation Program

- 70% of CRMs and CRM Candidates were not aware of the ICRM Special Designation Program

Standards Used for Benchmarking RIM Programs

- 60% of CRMs and CRM Candidate respondents indicated they used ISO Standards to benchmark best RIM practices
- 56% of CRMs and CRM Candidate respondents indicated they used ARMA Standards to benchmark best RIM practices
- 39% of CRMs and CRM Candidate respondents indicated they used Industry-Specific Association Standards to benchmark best RIM practices

Perceptions of the ICRM Logo

- 67% of CRMs and 58% of CRM Candidate respondents did not feel that the original ICRM logo accurately reflects the Records and Information Management Profession
- What most accurately conveys core mission of the ICRM?
- 64% of all respondents indicated Certification
- 58% of all respondents indicated Records Management
- 46% of all respondents indicated Competencies

ICRM Newsletter

The core attributes of the current ICRM Newsletter, ProfessionNotes, that CRMs and CRM Candidate respondents would NOT change ranked as follows:

- 45% would NOT change the Delivery Method
- 38% would NOT change the ICRM Updates
- 37% would NOT change the Professional Articles

ICRM Website

- 64% of CRMs and CRM Candidate respondents indicated that the ICRM website met their needs but 50% felt that it did not adequately market the CRM certification. See Communications Strategy, Page 2.

Marketing and Advertising

- 79% of CRMs and CRM Candidate respondents indicated they had never seen or heard an advertisement about the CRM certification.
- 61% of CRMs and CRM Candidate respondents that indicated they had seen or heard an ad were NOT motivated to pursue the certification.

Employer Support for ICRM Annual Dues

- 56% of CRMs and CRM Candidate respondents indicated that their employer pays or will pay for their ICRM annual dues.

Net Promoter Score

The Net Promoter Score is a strong indicator of customer loyalty. It asks the respondent how likely they would be to recommend the CRM certification to a colleague. 45% of CRMs and CRM Candidate respondents indicated they would recommend the CRM certification to a colleague.

Demographics

Education

- 43.8% of CRMs and CRM Candidate respondents hold a Bachelor's Degree
- 37% of CRMs and CRM Candidate respondents hold a Master's Degree
- 46% of CRMs and CRM Candidate respondents had 21 plus years of RIM experience

Gender

- 64.4% of CRMs and CRM Candidate respondents were female

Age

- 44% of CRMs and CRM Candidate respondents were between the ages of 46-55
- 26% of CRMs and CRM Candidate respondents were between the ages of 56-65
- 23% of CRMs and CRM Candidate respondents were between the ages of 36-45

Industry

- 12% of CRMs and CRM Candidate respondents represented consulting
- 25% of CRMs and CRM Candidate respondents represented government

Please do not hesitate to contact me if you have questions concerning the recent survey or our 2010 marketing, advertising or professional developments efforts.

Respectfully submitted,

Rae

Rae Lynn Haliday, MBA, CRM
ICRM Regent for Public Relations
and Professional Development