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## ICRM Leadership Report

### *President*

*Steve J. Golden, CRM*

1. Held monthly Executive Committee meetings
2. Quarterly calls with ARMA leadership
3. Oversight for special projects managed by Regents:
  - A. Bylaws update (Dave McDermott)
  - B. Vendor management (Mimi Dionne)
  - C. 2011 ICRM Elections (Dave McDermott)
  - D. New Part 6 protocol (Mimi Dionne)
  - E. Board member transition discussions (incoming members)
  - F. ARMA International Post Conference CRM sessions
4. Held Fall ICRM Board meeting in San Francisco November 5-7, 2010.
5. Presenter for ARMA International Post Conference CRM Sessions and general CRM session (Parts 1-5) held in San Francisco November 7-11, 2010.
6. Attended the 2010 PRISM, NIRMA and ARMA Midwest Rocky Mountain Regional Leadership Conferences.

### *President Elect*

*Debra Gearhart, CRM, FAI*

The ICRM Board of Regents met on November 5, 2010 in San Francisco, CA, prior to its Board meeting to spend a day completing the ICRM Strategic Business Plan. The Board had previously met in the spring in Detroit to begin the strategic planning process. The Plan was drafted based on the Detroit session, and submitted for Board review in August of 2010. Highlights of the Strategic Plan include exploring the feasibility of additional certifications, and expanding marketing efforts to prospective candidates, employers and other associations. Once the document is reviewed for final editing, the Strategic Plan will be posted to the ICRM website for member reference.

1. Examination Development Committee updated power point presentations used for CRM Examination Preparation workshops.
2. Assisted in writing new case studies for the Part 6 examination.
3. Participated in standing meetings for the ICRM Executive and Marketing Committees.
4. Participated in numerous CRM Examination Preparation workshops.
5. Coordinated and presented for the ARMA Post Conference CRM sessions and general CRM sessions held in San Francisco November 7-11, 2010.

## Public Relations, Marketing & Professional Development

*Rae Lynn Haliday, CRM, MBA*

### ICRM Branding and Marketing Committee Initiatives

Completed trademark process for new logo

Produced new ICRM booths for conferences

Produced new ICRM and CMP brochures

Produced new ICRM pins

ICRM Website Taskforce, Marketing Committee and branding strategist collaborated on the design of five new pages, and three site maps, which will result in an enhanced marketing presence and improve navigation and messaging to prospects, candidates and CRMs.

The initial launch of the site will occur by year's end with layers of new content being added as it is developed.

### Professional Development

ICRM Regents participated in numerous CRM Examination Preparation workshops held in Canada and throughout the USA, for ARMA region and leadership conferences, chapters and industry-specific associations.

The ICRM materials for CRM Examination Preparation are being formulized and a business plan is being developed for wider distribution and marketing of the credential through these activities.

The ARMA chapters and industry-specific associations will be significant stakeholders in championing this evolving process. Please contact me if your chapter or association leadership is interested in learning more about implementing a professional program for CRM examination preparation. Rae Haliday, (314) 646-4572 or by email at [haliday@stlzoo.org](mailto:haliday@stlzoo.org).

Completed the ICRM 2010 Demographic and Salary Survey. Thank you to the 433 members who responded to the Salary Survey; your feedback is critical to benchmarking advancement in the RIM profession, and to the identification of trends relevant to the CRM credential.

Participated in numerous CRM Examination Workshops for ARMA Chapters and/or industry-specific associations.

Presenter and coordinator for ARMA International Post Conference CRM sessions, and general CRM sessions held in San Francisco November 7-11, 2010.

### Institute of Certified Records Managers

- Apply today to develop professional, in-demand skills and competencies for career success.
- CRM designation provides proof of your commitment to lifelong learning, continuing education and being the best in your field.



*Celebrating 35 Years!*



Dave McDermott, CRM, FAI, was awarded the prestigious ARMA International Company of Fellows Award during the opening ceremony in San Francisco. The Board of Regents commends Dave for his professional achievements, and is honored to add another CRM to the distinguished list of Fellows.

**2010 ICRM Annual Reception Photos**  
To see photos, click on the link.

<http://www.flickr.com/photos/pak152/sets/72157625393355648/>

## Examination Development

*Don Schewe, CRM, FAI, Ph.D.*

Coordinated Examination Development Committee meeting held in San Antonio, Texas in September of 2010

Implemented new system for submitting Part 6 questions. Test developers preparing new questions for Parts 1-6.

New resources added to the ICRM Bibliography of Resources.

The EDC Committee continues to update its Procedures Manual in response to the conversion to an online test bank.

Participated in numerous ARMA regional leadership conferences and chapter CRM Examination Preparation workshops.

Presenter for ARMA International Post Conference CRM sessions held in San Francisco November 7-11, 2010.

## Examination Administration

*Mimi Dionne, CRM, PMP, CA, CDIA+*

117 candidates sat for 224 exams during the May 2010 exam period. The exam results were as follows:

	# Taking Exam	# Passing Exam	% Passing Exam
Part 1	39	20	51
Part 2	41	16	39
Part 3	32	14	44
Part 4	32	20	62
Part 5	45	13	29
Part 6	35	18	51

The four candidates who took the exams for Parts 1-5 in May 2010 passed all parts.

Four candidates passed Parts 1 – 6 in two cycles.

No candidate took Part 6 for reinstatement of the Certified Records Manager® designation.

No candidate passed Part 6 on appeals.

98 Candidates sat for 155 exams during the August 2010 exam period. The exam results were as follows:

	# Taking Exam	# Passing Exam	% Passing Exam
Part 1	26	15	58%
Part 2	27	9	33%
Part 3	16	10	63%
Part 4	18	9	50%
Part 5	36	11	31%
Part 6	32	19	29%

Eight candidates took all five Parts of the exam in August 2010; five passed all five Parts.

Three candidates passed Parts 1 – 6 in two cycles.

No candidate took part 6 for reinstatement of the Certified Records Manager® designation.

No candidate passed Part 6 on appeals.

## Certification Maintenance

*Rayanne Waggoner, CRM*

126 pre-approval requests processed since April 2010; of those requests, 68 were for ARMA International; 39 for Lorman Educational Services; 11 for ARMA Chapters; and 8 for other groups.

## Examination Grading

*Janet G. Pomeroy, CRM*

Continued to work with Technical Magic to streamline the examination grading process.

Rotation off the ICRM Board of Regents after 9 years of service across multiple positions.

## Certification Standards

*William W. LeFevre, CRM*

234 new applications received; 210 of those approved and 24 in the approval process.

Increase in number of online applicants in 2010.

No appeals for Certification Standards in 2010.

### Approval Statistics – 10 yr

Year	New Applicants	Approvals (old and new applicants)
2000	105	86
2001	103	95
2002	119	107
2003	147	134
2004	202	176
2005	191	124
2006*	241	160
2007**	156	129
2008***	144	134
2009***	152	150
2010***	234	210

## 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](mailto:recordspro@comcast.net) or by phone at (303) 579-8065. Deadline to submit articles is December 15, 2010 for the winter issue.

## 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.

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## Member in the Spotlight

Since the 55th ARMA International Conference is being hosted in a city on the Pacific Rim, I reached across the Pacific for our next Member in the Spotlight, Terry McCord, CRM. Terry just returned from working in China where he has lived. He was eager to share his experiences and shed some light on his career.



**Terry McCord, CRM**

Terry writes, "My first RM job was back in 1981- almost 30 years ago! I have been in and out of RM a couple of times, but I would say over 20 years. I have worked in two countries - USA and China - however my work in China was not records management (I ran my own import business and taught English). While my records management experience in the US was always based in California I worked for companies that sent me to do work in Texas, Illinois, Maryland, New York, Washington, and Oregon.

Terry received a Bachelor's degree in Chemistry and Speech. He claims that, "Neither of them has ever been officially required for any of the jobs that I have held - but a good liberal arts education gave me a solid foundation for almost anything that came my way. I don't think I can say that my education led me to RM. I came to RM like many people-by accident. I was working in a department called "lease terminations quoting" and the records center needed some assistance. I was asked to help out - and that started me on my RM career. When asked about important people and mentors in his career Terry wrote, "I have had a few. First was Marti Fischer. She was the RM who I went to help at the leasing company. She introduced me to the world of records management, ARMA and the ICRM. Then there was Hollis Pierce who hired me to help start an offsite records management company. I was there 10 years after she moved on. And there were many others who I worked with in ARMA. All of the members of the Golden Gate, Silicon Valley, and Mt. Diablo Chapters (yes, I belonged to all three at one time.) And a few at the National level of ARMA and the ICRM. Gail Pennix, Kathy Sparks, Nancy Williams, John

O'Brien, Juanita Skillman, Anne Gearhart (I would have never been a CRM without her help!) Suddenly I feel like I am giving a thank you speech!"

When I asked Terry what was the most exciting job he had held he responded, "This is hard. I have enjoyed most of the jobs that I have had, and each one has had "exciting" moments. When I was Deputy City Clerk for the City of Oakland I had to work on several projects with the then-Mayor Jerry Brown. That was always interesting. I loved teaching RIM as an adjunct professor at San Jose State University. And as a consultant I once got to sail on a cargo ship from Los Angeles to San Francisco so that I could conduct a records inventory on board. You don't get to do that every day. And of course, teaching English in Shanghai was very exciting."

It can't be all glamorous work. What was the most mundane job he held? "Does this include being a bus boy/dish washer in a restaurant when I was 17 - that was pretty mundane! As far as work related to RM? Since everything I know about RM I learned "on-the-job" I don't know that any of my RM jobs were ever mundane. I was always learning something."

When not managing records Terry is busy. "I have traveled a lot - mostly in China. I spend way too much time on the computer (email, IM, surfing). And I quilt (it is the piecing that I love)."

Terry is actively looking for a Records Management position now that he has returned to the States. He reports, "During my recent job search, when I told a friend that I was a "records manager" he proceeded to tell me how 'vinyl is dead, as are tapes. Even CDs won't be around much longer - everything will be digital and downloaded from the internet' "Ha! Who knew?"



## 2010 Election Results

The Election Results are in! Please join me in congratulating the following elected ICRM Board of Regent members:

Serving a one-year term as President Elect to begin January 1, 2011 –

**Juanita Skillman, CRM**

Following succession established by the ICRM by-laws;

**Debra Gearhart, CRM will serve as President and Steve Golden, CRM will serve as Chair for one year beginning January 1, 2011.**

Serving two-year terms to begin January 1, 2011:

**Treasurer – Donna Vitalie, CRM**

**Secretary – Martha Adcox, CRM**

**Regent, Certification Standards – Ginny Jones, CRM**

**Regent, Exam Development – Don Schewe, CRM**

**Regent, Certification Maintenance – Rayanne Waggoner, CRM**

**Regent, Exam Grading – Mary Hilliard, CRM**

This year we had a very full slate of qualified candidates, thank you to all who participated as candidates and thank you to all who voted (35% voter turnout).

**David McDermott, CRM**

**Nominations Chair, ICRM Board of Regents**

## AIEF

### The African Textbook Project

The African Textbook Project is an initiative of the ARMA International Education Foundation (AIEF) and the International Records Management Trust (IRMT). Through this project, we are providing textbooks to African universities that teach records and archives management courses. We also provide books for the reference libraries of national archive institutions to help their staff continue their professional development.

Textbooks are expensive and difficult to obtain in Africa, which limits access to newer titles and means that there aren't enough copies of books to go around in newly established Records and Information Management (RIM) programs. This impedes the delivery of professional education and hinders academics and students from engaging with new ideas and contributing to new developments in the field. Recognizing the problem, the AIEF conceived of the Project and started the program by contributing books, donated by ARMA members and chapters, to the Bagamoyo Archives School in Tanzania and Makerere University in Uganda. The Records Management Association (RMA) in the United Kingdom and the Records Management Association of Australasia (RMAA) are also participating in donating educational materials to the project.

The AIEF now works with the IRMT on an expanded program servicing 18 universities. The Project is intended to be part of a wider initiative to build professional capacity in Africa as nations make the transition to computerization and electronic records management.

How can you help? The AIEF has challenged ARMA Chapters to donate \$100.00 to help buy and ship resources to Africa through the IRMT. We extend this challenge to CRM's and all those interested in participating. Donations of any amount are welcome through the Foundation website, [www.armaedfoundation.org](http://www.armaedfoundation.org). The AIEF will be buying surplus books, guidelines and other reference materials from the ARMA Bookstore, and the IRMT will use their established contacts to ship them to the African Educational Institutions.

Individuals, Chapters, Vendors, we all have a stake in furthering our profession, and this project is one means of ensuring that developing nations have access to what we take for granted in the way of RIM textbooks, guidelines, whitepapers, etc.

**SHARE OUR RESOURCES – ADVANCE OUR PROFESSION!**

Thanks,  
Juanita Skillman

## Observations on Certification

The following item was first printed by the Gulf Coast Legal Tech Center and submitted by gltcnola ([www.gulftc.org](http://www.gulftc.org))

There has been a robust discussion about e-discovery “certification” all this week on the Lit Support listserv. I have not posted on the group because I am a member of the Board of Governors of the Organization of Legal Professionals (OLP), one of the groups being discussed and in that capacity I also serve on the committee that reviews the material that OLP instructors use into teach their courses. Given that work I felt my comments would not be completely unbiased but I do have several general observations I would like to make.

First, I have never approved of the use of the word “certification” for what the OLP, or any of the other groups, are doing. I have expressed this opinion in our Board meetings and in other public venues: when we talk about “certification” for anyone we raise the issue of educational standards: standards are so far totally lacking in the e-discovery world and the right to grant an educational certificate to anyone raises a host of other licensing issues, which are only compounded when we use the phrase with regards to attorneys and paralegals.

It seems to me that what we are providing is what Julie Wade called in her post on the Lit Support discussion thread, “... a core competency program – the type that the Courts want e-discovery staff to have.” To me that is most important, getting the foundation right. Everywhere I speak on the subject of e-discovery, a substantial number of audience members ask questions like: “What is a TIFF?” “What does hash mean?” “What do you mean when you say native file?” We need to lay the foundation before we try to install the carpeting on the third floor.

Second, this not a one size fits all proposition. As my good friend Bill Kellerman of Wilson Sonsini pointed out in the discussion, “... my earlier comments, especially my “ranking,” should not be misconstrued. Because Paul asked about ‘best for a lawyer’ my rankings reflected that, and no more than that. If he asked ‘best for a paralegal’ my ranking would have been exactly reversed. If he asked ‘best for a vendor employee’ I would have written something different altogether.”

Why should we assume that one organization is enough? Is one college enough? One law school? We have a million attorneys in the US alone. That’s probably beyond the scope of any one organization to educate.

So let’s stop arguing about who is the best and heed Bill’s advice when he says “... there are a lot of good, knowledgeable, hard working people in each organization all trying to solve similar problems. The impediments they face are real, mostly artificial and not-inconsequential. ... there is room for everyone at the table. Once the programs are up and running, the market will decide the results.”

Nuf said.

You can respond to this article at <http://gltc.wordpress.com/2010/10/29/observations-on-certification/>

## 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.

## ICRM 2011 Examination Schedule

### **Winter:**

Parts 1-5, February 7-11, 2011. Part 6, February 17, 2011.  
Registration opens on November 19, 2010 and runs through February 3, 2011.

### **Spring:**

Parts 1-5, May 2-6, 2011. Part 6, May 12, 2011.  
Registration opens on February 25, 2011 and runs through April 28, 2011.

### **Summer:**

Parts 1-5, August 1-5, 2011. Part 6, August 11, 2011.  
Registration opens on May 20, 2011 and runs through July 28, 2011.

### **Fall:**

Parts 1-5, November 7-11, 2011. Part 6, November 17, 2011. Registration opens on August 19, 2011 and runs through November 3, 2011.

Please note that should you need to request special accommodations in anticipation of your testing experience with Pearson Vue, please submit your request to [mimi.dionne@gmail.com](mailto:mimi.dionne@gmail.com) at least three weeks prior to exam week, if not earlier.

## Attention CRMs

You may have noticed a new addition to the ICRM online database. When you log on your Certification Maintenance cycle dates appear at the top of the page. Just a little reminder to help you stay current with your CMP requests. Remember, you must apply for Certification Maintenance within 6 months of the activity.

When you apply online for Certification Maintenance attach your electronic documentation directly to the online request. Here's how - open the request you just entered, go to the bottom of the screen and select "Documentation". Browse to find and add the documentation, wait a minute or so and then select "Refresh".

## Completion Time Required

All parts of the examination must be passed within a period of five consecutive years. If an applicant fails to do so, the part(s) taken and passed initially must be repeated so that the passing of all parts occurs within a five-consecutive-year period. This period will be five years from the date of approval as a candidate.

## Membership Dues

Membership dues for all Certified Records Managers are due by January 31 of each year. Invoices will be sent out via email in mid-November. Members have the option of paying the online invoice with credit card, printing the online invoice and sending check or credit card payment to the Syracuse office, or calling the Syracuse office and paying by credit card over the phone. All unpaid invoices will be assessed a late fee on February 1st and dues and late fees not paid by April 1 can result in decertification for the member.

Please make sure your email system will accept mail from [admin@icrm.org](mailto:admin@icrm.org) so your dues invoice does not get rejected or sent to a spam folder. Be sure to have your correct email address in your file in the ICRM database. And please make sure you pay your dues on time. We do not like decertifying CRMs after they have worked so hard to earn certification. If you do not receive your dues invoice by December 1, contact the ICRM Syracuse office via 1-877-244-3128 (USA and Canada) (staffed between 9AM - 4:30PM Eastern Time) or via the alternate phone number 315-234-1904.

Virginia A. Jones, CRM, FAI - Treasurer

## 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:

### Mailing Address:

Institute of Certified Records Managers  
403 East Taft Rd.  
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](http://www.ICRM.org)

## Newsletter Publishing Schedule

*ProfessioNotes* is published four times a year (winter, spring, summer and fall) by the ICRM. Deadline to submit items for the winter issue is December 15. Articles, inquiries, letters to the editor, or other comments should be directed to:

**Linda Buss, CRM**

e-mail: [recordspro@comcast.net](mailto:recordspro@comcast.net)

## NEW CRMs

Congratulations to the following individuals in the US and Canada who earned their Certified Records Manager (CRM) designation by passing the Part 6 examination in August, 2010:

**Cheryl L. Banke, CRM**, La Grange Park, IL

**Matthew Y. Eidson, CRM**, College Park, MD

**Margaret E. Eusch, CRM**, Richfield, WI

**Peggy J. Fischer, CRM**, Austin, TX

**Charles H. Garrett, Jr., CRM**, Houston, TX

**Wendy B. Glickman, CRM**, Matawan, NJ

**Cindy L. Hargett, CRM**, Rio Rancho, NM

**Elizabeth Jenks-Prebushewski, CRM**, Biggar, SK  
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**Cynthia C. Klinger, CRM**, Richmond, KY

**Laura D. Lamont, CRM**, Blue Springs, MO

**Nuha Nazy, CRM**, Chicago, IL

**Thomas E. Owens, CRM**, Baton Rouge, LA

**Abel R. Ramon, CRM**, Highlands Ranch, CO

**Lucy Rieger, CRM**, Ridgewood, NJ

**Marilyn M. Santos, CRM**, Kitchener, ON CANADA

**Cindy S. Smith, CRM**, Grand Junction, CO

**Jennifer A. Watters Farley, CRM**, Staten Island, NY

**Maureen M. Wilson, CRM**, Chicago, IL

**Brett A. Wise, CRM**, Waltham, MA

## Decertifications

The ICRM Board of Regents have revoked the certification of the following CRMs for not completing sufficient credits during the current credit cycle: Alex Acevedo, Robert Huggon, Adam Jansen, Colleen Walford.

Decertified CRMs are no longer eligible to use "CRM" or "CRM Retired" as it relates to their being a Certified Records Manager and must refrain from using the designation in all official or unofficial transactions or activities.

## 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

## ICRM Pre-Approved CMP Activities,

Activity Date	Activity	Credit Hours	Sponsor
12/2/2010	Medical Records Law in Maryland - Annapolis	6	Lorman Education Services Annapolis, MD
12/7/2010	Medical Records Law in Maryland - Baltimore	6	Lorman Education Services Baltimore, MD
1/21/2011	Medical Records Law in New Hampshire - Manchester	6	Lorman Education Services Manchester, NH
1/25/2011	Medical Records Law in Massachusetts - West Springfield	6	Lorman Education Services West Springfield, MD
1/27/2011	Medical Records Law in Utah - Salt Lake City	6	Lorman Education Services Salt Lake City, UT
2/2/2011	Medical Records Law in Florida - Orlando	6	Lorman Education Services Orlando, FL
2/4/2011	Medical Records Law in Georgia - Macon	6	Lorman Education Services Macon, GA
2/11/2011	Medical Record Law in Texas - Houston	6	Lorman Education Services Houston, TX
2/16/2011	Document Retention and Destruction in Texas - Houston	6	Lorman Education Services Houston, TX
2/16/2011	Medical Records Law in Missouri - Springfield	6	Lorman Education Services Springfield, MO
2/17/2011	Medical Records Law in New Jersey - Parsippany	6	Lorman Education Services Parsippany, NJ

Activity Date	Activity	Credit Hours	Sponsor
2/18/2011	Document Retention and Destruction in West Virginia - Charleston	6	Lorman Education Services Charleston, WV
2/24/2011	Medical Records Law in Minnesota - Rochester	6	Lorman Education Services Rochester, MN
3/1/2011	Medical Records Law in Pennsylvania - Philadelphia	6	Lorman Education Services Philadelphia, PA
3/4/2011	Medical Records Law in Pennsylvania - Wilkes-Barre	6	Lorman Education Services Wilkes Barre, PA

## The Regent of Exam Administration Welcomes Your Comments!

There's a new way to submit comments on your testing experience to Mimi Dionne!

After you complete your exam, go in under the Registration tab and enter yours. The link will be available to you for up to one month after the exam. These comments will be moderated, collected, and presented to PearsonVue and the Board to improve the overall testing experience for all candidates. So, help one, help all—and enter your comments!

## Need assistance during your exam?

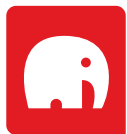
Now you can alert the Regent of Exam Administration via the ICRM website!

As you register for the next exam cycle, you'll see "Assistance" appear under the "Feedback" column.

Select one of the options from the drop-down Assistance menu and Mimi Dionne will collect the comments from there.

Here's the thing: you **MUST** turn in your assistance requests **TWO WEEKS** before the exam cycle. Any closer to the exam, and PearsonVue can't make the arrangements in time—so get those requests in!

2010 ICRM Annual Reception



# OmniRIM™

Retaining Information Matters

*Thanks very much to OmniRIM and staff Bruce Nunn and Heidi Dorman who sponsored and coordinated the great wine presentation at this year's Annual Reception.*

OmniRIM is a leader in records and information management software, with products designed to reduce risk related to compliance and legal discovery. OmniRIM enables clients to manage records throughout their lifecycle, with consistent retention schedules and metadata for physical and electronic records. Visit us at [www.OmniRIM.com](http://www.OmniRIM.com)

Entertainment and incentives provided by OmniRIM



## Financial Report

Financial Report - 3rd Quarter 2010 (Cash basis)  
1/1/2010 through 9/30/2010

Date	Amount	Total
<b>INCOME</b>		<b>\$ 226,331.76</b>
Dues & Applications		\$ 144,864.00
Electronic Exam Fees		\$ 61,535.00
Interest Inc		\$ 45.58
Other Inc		\$ 19,887.18
<i>Reception Income</i>	4,125.00	
<i>Other Other Inc (GWDC ARMA - CRM Prep Seminar)</i>	541.00	
<i>Pre_Post Conference Seminar (Fall 2009)</i>	15,221.18	
<b>EXPENSES</b>		<b>\$ 115,419.23</b>
Administrative Support		\$ 31,547.54
<i>Clerical Support</i>	14,881.00	
<i>CMP Support</i>	14,352.00	
<i>Mileage</i>	50.1	
<i>Office Space</i>	2,079.60	
<i>Other Expenses (Photocopies, supplies &amp; fax)</i>	184.84	
Bank Charge		\$ 5,616.54
<i>Credit Card Processing Fees</i>	4,802.67	
<i>International Transaction Fee</i>	813.87	
Exam Expenses		\$ 53,167.15
<i>Testing Fees</i>	29,450.00	
<i>Test Conversion &amp; Publishing</i>	21,600.00	
<i>ADA Accommodations</i>	50.00	
<i>Psychometric Reports</i>	1,800.00	
<i>postage</i>	267.15	
IT Support And Fees		\$ 27,408.20
<i>Hosting</i>	279.33	
<i>Hosting &amp; Maintenance</i>	27,128.87	
Legal		\$ 1,520.54
Marketing		\$ 8,212.52
<i>Booth Purchase</i>	2,262.14	
<i>Brochure Printing</i>	2,067.41	
<i>Newsletter Publication</i>	300.00	
<i>Pin Production (+ conference ribbons)</i>	2,282.97	
<i>Trademark Filing</i>	100.00	
<i>Website pages</i>	1,200.00	
Meetings		\$ 21,274.29
<i>Board</i>	6,088.36	
<i>EDC</i>	11,321.55	
<i>Other</i>	3,864.38	
Membership		\$ 100.00
Misc		\$ 285.45
<i>Memorials&amp;Condolence</i>	259.45	
<i>Other (deposit slips)</i>	26.00	
Postage Expense		\$ 1,309.55
<i>Express Mail</i>	165.43	
<i>Shipping</i>	10.30	
<i>Other Postage Expense</i>	1,133.82	
Printing		\$ 37.80
Professional Services		\$ 2,212.55
<i>Election Management</i>	663.30	
<i>Electronic Surveys</i>	200.00	
<i>Merchant Svcs Gateway</i>	349.25	
<i>Other Professional Services</i>	1,000.00	
Publications		\$ 211.33
<i>EDC</i>	211.33	
Software		\$ 517.06
Supplies		\$ 372.86
Telecommunications		\$ 926.68
Travel		\$ 15,823.54
<i>board</i>	6,566.43	
<i>EDC</i>	5,526.13	
<i>other</i>	3,730.98	
<b>PROFIT (LOSS)</b>		<b>\$ 110,912.53</b>

## CRM Examination Preparation: Past, Present and Future

*Rae Lynn Haliday, CRM, ICRM Regent for PR and Professional Development*

Juanita Skillman, CRM, FAI and Debra Gearhart, CRM, FAI, two highly dedicated RIM professionals, identified the need for the ICRM to develop consistent materials to assist CRM Candidates with examination preparation about a decade ago. Leveraging the efforts of large ARMA Chapters like Houston, they built substantial CRM mentorship programs for their own, and assisted others in doing the same. ICRM Power Point presentations, based on evolving CRM exam content, were eventually developed several years ago and word of mouth has expanded their use.

CRM scholarships to assist and motivate members to achieve the CRM designation.

On behalf of the Institute, I would like to personally thank those ARMA Chapters and industry-specific associations that have led the way in promoting the CRM, and doing whatever it takes to increase awareness and to champion the core values the designation stands for in the RIM profession.

The ICRM Marketing Committee will be developing a survey in the near future to assess our current level of success with these programs, where we have gaps and to gather key information required to complete the business plan for a formalized examination preparation product.



### ICRM Booth

Building on these foundational efforts, with the implementation of a new logo and branding strategy in 2009, the Institute identified the need to provide greater oversight for the examination preparation process. It is evaluating the implementation of a more formal program that will rest with the ICRM and be widely distributed. A business plan is under development to identify all key factors and partners in the initiative. The primary deliverables being to market the materials required to effectively brand and promote the CRM credential, and to deliver high quality examination preparation workshops in enough venues to adequately reach current Candidates and prospects.

At this time the ICRM offers in-depth CRM Examination Preparation pre or post conference sessions at the ARMA Conference as well as general sessions. ICRM Regents are represented at many of the ARMA regional seminars or leadership conferences every year. More and more ARMA Chapters are contacting us with an interest in using our branded materials as part of a growing commitment to support their members in pursuing the credential. Some ARMA Chapters and industry-specific associations have implemented



### ICRM Examination Preparation Materials



### ICRM Examination Preparation Sessions ARMA International Conference 2010

(Steven J. Golden, CRM, ICRM President, Presenter)