ICRM
Institute of Certified Records Managers

ProfessioNotes

WINTER 2010

A Newsletter of the Institute of Certified Records Managers®

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President's Message

Welcome to 2010, fellow CRMs. I'm very excited about my year as President of the Institute and of many great accomplishments we may begin and achieve this year and into the future!

In the next issue of ProfessioNotes the Board will share some of the strategic planning exercises we are undertaking to continue to make our mark in the records and information management community.

For the remainder of my message I will reflect on the recent passing of our Chairman, Alan Andolsen. Alan passed away in New York City on January 24, 2010, after fighting an illness since last year. I've had the opportunity to serve the ICRM Board of Regents with Alan for the past six years. Over the past couple of weeks I've seen and heard countless comments on Alan's contributions to our profession. Both as a professional and as a person Al was outstanding! He had a significant involvement in many of our initiatives over the past years, including the extensive updates to our website and database during his time on the Board. I'd like to share a quick story with you that embodies the spirit he brought to the Board from his first day.

The fall 2003 meeting in Boston was my first introduction to the Board after becoming the Regent, Public Relations and Professional Development. Al had recently been elected Vice President and, as an incoming member, was invited to this meeting. As the two new guys we sat together trying to get used to this group. During the meeting we discussed the administrative procedures of the Board, the committees, and support staff. The discussion came to a quick point - our manual was in need of revision and updating. Al decided to speak up and offer to help. His suggestion was that since the VP needed to own the administrative processes he would collaborate with each person on the Board to help update their area of responsibility. Now, this takes some commitment. At the time our Board was scattered across the country. During the following six months Al completed his mission, working in visits during his many business travels and completing the task at no cost to the Institute.

From the time I first met Al until our last conversation just a few months ago, many things remained constant - his willingness to give, the feeling that you were the entire focus of every conversation with him, and his desire to make things better for the person who was next in line.

I could talk about Al's contributions to the ICRM for quite some time, however I will finish by saying that Al's leadership will be missed at all levels of the Institute, and we have lost a true friend to the profession.

2010 Emmett Leahy Award Call for Nominations

Awarded for Outstanding Contributions and Accomplishments that Have a Major Impact on the Records and Information Management Profession

The Emmett Leahy Award recognizes an individual whose contributions and outstanding accomplishments have a major impact on the records and information management profession. Established in 1967, this award honors the spirit of innovation, dedication, and excellence in records and information management of Emmett Leahy, an icon in the development of the life cycle approach to managing records and information.

The Emmett Leahy Award, which is not formally affiliated with any profession, or professional association, is presented during the ARMA International Annual Conference.

Individuals, employers, or professional associations may make nominations.

Nominations should be sent electronically to Charles Dollar, Chair of the Leahy Award Committee (charles@emmettleahyaward.org) by March 1, 2010.

Nomination letters should succinctly (no more than two pages) and clearly identify the significant contributions the individual has made to the information and records management profession that meet the criteria for the Leahy Award.

http://www.emmettleahyaward.org/Award.html

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 March 31, 2010 for the spring 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

A new feature of ProfessioNotes is a glimpse of CRMs around the world with a biography of one professional each issue. The winter issue's premier article, while brief, features a woman who has recently achieved her certification.

Paula Sutton, CRM

Paula Sutton, Records Manager at Platte River Power Authority (PRPA) in Ft. Collins, Colorado recently achieved the designation of Certified Records Manager. Platte River's Headquarters is located in Fort. Prior to working at the PRPA, Paula served as Records Specialist/Archivist at Northern Colorado Water Conservancy District, Records Specialist at Western Area Power Administration, and Records Specialist at the City of Loveland, Land Records Management Division. She is a graduate of Colorado State University.

Paula is an active member of the Northern Colorado Chapter of ARMA as Member at Large. In a recent chapter newsletter she noted that she has enjoyed her time serving as Region Manager.

If you have a recommendation to feature in a future ProfessioNotes issue, please notify the newsletter editor, Linda Buss at lbuss@usbr.gov or recordspro@comcast.net.

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.

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.

ICRM 2010 Examination Schedule

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

Spring 2010 Exam Registration
February 17 – April 29, 2010

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

Summer 2010 Exam Registration
May 19 – July 29, 2010

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

Fall 2010 Exam Registration
August 20 – October 28, 2010

Attention CRMs

Don't Forget:
You must apply for Certification Maintenance (CMP) hours within 6 months of the activity.

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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(Toll–free USA and Canada)

Alternate Telephone:

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

Strategic Information Management - Proposed Framework

Sam McCollum , MBA, CRM, ERMm
Manager, Strategic Information Management
ENMAX Corporation

Introduction

ENMAX Corporation is a major utility company based in Calgary, Alberta, Canada. It has a very progressive enterprise-level Information Management program and is currently in the middle of a five year project to implement Electronic Content Management (ECM) within its 54 key departments. However, to meet the current strategic unstructured electronic information (UEI) requirements of the organization, it was necessary to develop a set of guidelines to manage all UEI both within and outside of the ECM effort.

This article is a position paper developed by the IRM Policy and Compliance group and it encapsulates most of the IM considerations necessary to successfully manage UEI at each of their maturity stages. A number of these initiatives have already been implemented within ENMAX, some are in the process of implementation, and others are waiting on the development and approval of effective policy and procedures and implementation processes.

This information may be helpful to CRMs who are mandated by their senior management with the difficult task of managing unstructured electronic information. It is hoped that each organization will carefully consider and adapt these concepts to fit their needs.

Background

The goal of Strategic Information Management (SIM) is to ensure the flow and management of information that most effectively and efficiently supports strategic objectives.

Collateral objectives include providing the tools to manage e-discovery and legal holds, reduce the volume of stored information, adhere to compliance requirements, enhance business continuity processes, and address ISO standard issues.

Client departments also have concerns with these issues and as a result ENMAX is developing an enterprise level framework that provides consistent guidelines on the storage, retention, and disposition of paper-based, electronic, and email information.

The following proposed framework for strategic information management details proposed guidelines for the management of email and electronic information stored on network drives. It also provides documentation on the supporting areas of SIM policy and procedures, education and training, and compliance assurance.

Email Management

A well designed email management system will reduce storage and e-discovery costs, improve search and retrieval efforts, improve compliance with regulatory, legislative and corporate governance requirements, accommodate legal hold needs, and improve staff efficiency.

A well designed email management system needs to address three issues as follows; the management of user email folders, the archiving of 'official information' email, and the classification, retention and disposition of archived email.

The recommended processes for each of these three issues are as follows:

Management of User Email Folders

When an email document is created or received, and before it is transferred to the email archive or deleted, it resides in folders on the Outlook Server. Proper management of these folders and their content is the first step in a well designed email management system. This system is based on the formation of three email zones and the effective transfer of email between the folders within the zones (this 3 email zone system is based on a successful program developed by the Global Operations Manager for Halliburton in the USA). The structure and explanation of those email zones follows:

Zone 1 is the default area for all received email. It includes the inbox (60 days), deleted (3 days), drafts (60 days), sent (60 days), junk mail (7 days), any user created folders (60 days), and any data stored in the calendar (2 years), notes (2 years), tasks (2 years), and journal (2 years) folders. The documents contained in these folders will be kept for the time period shown in brackets after each folder name.

Five days before these documents are slated for disposition, the document titles will be added to a 'pending disposition' list so that users will have the opportunity to transfer these documents to Zone 2 before they are deleted. Documents that have been identified as 'official information' should be transferred to Zone 3 folders as soon as the 'official information' determination has been made.

Zone 2 consists of user created folders for reference documents or work in progress documents. The documents contained in these folders (and sub-folders) will be kept for two years. However, the maximum storage space for these folders is a total of 500 MB. When the storage capacity has been reached, the user will have to delete sufficient email documents to remain within that capacity limit.

The titles for any email documents that are more than two years old will be added to a 'pending disposition' list so that users will have the opportunity to transfer these documents to non-email storage media before they are deleted. Documents that have been identified as 'official information' should be transferred to Zone 3 folders as soon as that classification determination has been made.

A field will be added to the email home page to show the total volume of Zone 2 space that has been used up. A custom report can also show the sizes of individual Zone 2 folders and sub-folders (to assist in determining which email documents to transfer or delete.)

Zone 3 consists of user created folders based on the Corporate Information Classification and Retention Schedule (CICRS) classification and stores 'official information' email that has been transferred from either Zone 1 or Zone 2.

Email documents in Zone 3 are transferred each night to the email archive storage and are replaced by a 'stub' in Zone 3 that is used to retrieve the email from the archive as needed. Deletion of email stored in the email archive is based on the corporate CICRS retention.

If email is retrieved from the archive and the email contents are changed, then this action results in a new record, so both the original email and the changed email are archived.

Email Archiving

Email archiving is the process of transferring 'official information' from the email server (Zone 3) to a more permanent storage media. Its purpose is to reduce the storage demands on the email server while at the same time preserving the access of that email to users for the retention period of that particular information. Email archiving is a document management function (which focuses on lost and misfiled documents, faster access, reducing physical storage, better document organization, and improved efficiency) and does not meet any of the information management or compliance functions required by legislation, regulation or corporate governance (i.e. records inventory, information retention, ownership, chain of custody, audit trail, e-discovery, adherence to IRM policy and procedures, preservation and disposition of information, and legal holds).

ENMAX has adopted an email software product for its email archiving process. Existing/legacy email will be transferred to the email archive without classification. Staff will be encouraged to delete any transitory documents (non-official information) before the archive process begins.

The intention is to also transfer all existing PSTs from present time back to and including all 2005 PSTs. All other PST files should be deleted or copied to discs. Once the email archive system is in place no further PST files should be created.

Email Management

Email management is the process of applying information management to email stored in an email archive. It includes the processes of creating and managing an information index based on the corporate classification system, applying information retentions based on the CICRS, determining the ownership of all official information, providing for a chain of custody and audit trail, enabling e-discovery and legal holds, ensuring adherence to IRM policy and procedures, and preserving and disposing of information as required.

Email management requires the application of autoclassification software as a first step in the IRM process. The next step would be the creation of an email index based on that classification. At this point all of the other IRM functions outlined above could be applied.

Email Management within Livelink

The OpenText ECM product (Livelink) includes the ability to transfer and store email, which has been classified as official information, within email folders that can be created alongside the standard electronic information folders within the Livelink folder structure. Storing official information email within these folders has the following advantages:

a. Both the email and electronic documents are stored in the same enterprise repository, simplifying filing and searching of related data.

b. Classification and retention criteria can be added to the email folders so that retention and disposition of official information email is greatly simplified.

c. The audit function within Livelink now applies to all email. This function meets all compliance and e-discovery requirements.

d. The search and retrieval functions within Livelink are superior to the Outlook search functions.

e. The purchase and installation of email auto-classification software and the installation of email archive software becomes redundant. This process would eliminate the need for both sections #2 and #3 above.

f. All existing PSTs can be downloaded in Livelink for easier search and retrieval and more stable and secure email storage.

Management of Electronic Information Stored on Network Drives

ENMAX uses a software product called OmniRim to maintain an index of all paper-based information. It also indexes paper-based vital records (signed documents and other vital information required for business continuity) that are scanned and stored on a network drive.

However, over 15 million plus electronic information items, which reside on network drives, are not classified or indexed.

Because the majority of electronic information on drives within ENMAX is not classified as per the corporate classification system, it cannot be properly managed, retained or disposed of as per CICRS guidelines. The failure to properly manage electronic information on drives translates into a possible higher litigation and compliance exposure to the organization.

A well designed management system for electronic information on drives will reduce storage and e-discovery costs, improve search and retrieval efforts, improve compliance with regulatory, legislative and corporate governance requirements, accommodate legal hold needs, and improve staff efficiency.

A management system for electronic information on drives needs to address three issues as follows; the management of user folders on network drives, the implementation of document management systems (including SharePoint), and the implementation of information management systems (LiveLink).

The recommended processes for each of these three considerations are as follows:

Management of User Folders on Network Drives

When an electronic document is created or received, and an electronic archive system (Livelink or SharePoint) is not available, the electronic information is usually stored in folders on personal, department, or public network drives. The total number of personal, department and public drives at ENMAX exceeds more then 2,400 separate electronic information repositories.

Each of these 2,400+ repositories may be organized and classified using individual and unique systems. As indicated above, these repositories can contain over 15 million separate items of electronic information.

The proper management of these folders and their content is the first step in a well designed management system for electronic information stored on network drives. This system is based on the effective use of two network drives and the proper transfer of electronic information between the folders that reside on those drives. It is also based on the following information management principles:

a. Electronic information that is evidence of a business transaction, or that is required for financial or legal purposes is official information and must be managed as per legislative, regulatory, and corporate governance requirements.

b. Electronic information that qualifies as official information may be created as a draft or a transitory document by the originator of the information. Once that information is shared with another person, it should no longer be considered as a transitory document but should be classed as official information and governed by ENMAX's information management policy.

The structure and explanation of the two network drives ('H Drive' and 'I Drive') follows.

'H' Drive - Electronic information should first be created on the 'H' Drive (Personal network drive). Electronic information that is transitory in nature can remain on this drive until it is shared with another person. At that point, it may meet the criteria for 'official information' which should then be moved to the 'I' Drive (department network drive). Personal and/or confidential information may continue to reside on the 'H' drive.

The definitions for transitory information are clearly spelled out in the ENMAX IRM procedure document 'Processing of Transitory Records (EC/IRM/PR-02)'.

At a minimum, electronic information stored on the 'H' Drive should be organized using electronic folders based on the CICRS standard. This means that all electronic information stored on the 'H' Drive should be filed into one of a maximum of 16 electronic functional folders. This process facilitates searches that are part of compliance or litigation considerations, enables the application of information management guidelines, and reduces the required preparation time to transfer the electronic information to a future ECM platform.

All electronic information stored on the 'H' Drive, both official and transitory information, should be retained and disposed of according to the guidelines contained in the CICRS document.

'I' Drive - Electronic information that needs to be shared with others or that has been designated as Official information, should be stored on the 'I' Drive (Department network drive).

At a minimum, electronic information stored on the 'I' Drive should be organized using electronic folders based on the CICRS standard. This means that all electronic information stored on the 'I' Drive should be filed into one of a maximum of 16 electronic functional folders. This process facilitates searches that are part of compliance or litigation considerations, enables the application of information management guidelines, and reduces the required preparation time to transfer the electronic information to a future ECM platform.

All electronic information stored on the 'I' Drive should be retained and disposed of according to the guidelines contained in the CICRS document.

Document Management of Electronic Files

Document management refers to the process of managing documents (both transitory and official information) in order to achieve the following operational requirements:

a. Reduce the incidence of lost and/or misfiled documents

b. Provide faster access to information

c. Reduce physical storage requirements for electronic documents

d Provide better document organization

e. Improve staff efficiency when dealing with information

Document management can be achieved in two ways. The first method is to create a SharePoint site and make it available to all users working with that set of information. The second method is to implement LiveLink's basic document management software. Both methods provide the operational capabilities listed above. SharePoint is more effective when a team collaboration situation exists. Livelink Document Management is more effective where the emphasis is on the active management of large volumes of drawings and correspondence.

However, neither method meets ENMAX's administrative obligations as they relate to Information Management. The acceptable method to ensure these documents are managed according to IRM guidelines is to upload the data on a regular basis to the corporate LiveLink repository.

At a minimum, electronic information stored within a SharePoint or Livelink document mgt repository should be organized using electronic folders based on the CICRS standard. This means that all electronic information stored within either of the two types of information repository should be filed into one of a maximum of 16 electronic functional folders. This process facilitates searches that are part of compliance or litigation considerations, enables the application of information management guidelines, and reduces the required preparation time to transfer the electronic information to a future full Information Management platform.

All electronic information stored within the repositories should be retained and disposed of according to the guidelines contained in the CICRS document.

Information Management of Electronic Files

Information management refers to the process of managing information (official information only) in order to achieve the following administrative requirements:

a) Development and maintenance of an information inventory

b) Provision for information retention, preservation and disposition

c) Determination of ownership for each information item

d) Creation of a chain of custody and audit trail for each information item

e) Provision for an effective e-discovery process

f) Adherence to IRM policy and procedures

g) Development of a legal holds process

ENMAX management has selected and is implementing Open Text's LiveLink software as the corporate standard for information management. LiveLink meets the requirements for an ECM (Enterprise Content Management) system, which includes all of the information management components listed above.

The IT department within ENMAX is currently providing the capability to implement Livelink Information Management capabilities into all departments under the ECM Project.

All electronic information stored within the Livelink Information Management corporate repository is automatically retained and disposed of according to the guidelines contained in the CICRS document.

Associated Policy/Procedures

The IT Policy and Compliance department is responsible for the creation and maintenance of all policy and procedures related to the SIM Framework.

A revised Corporate Information Management policy has been submitted for review by Legal Services and approved. Information Management procedures dealing with the following activities are currently completed or under design:

- Management of transitory documents
- Management of user email folders
- Retrieval of email from the email archive
- Management of user folders on network drives
- Management of electronic information within document mgt repositories
- Transfer of electronic information from document mgt repositories to Livelink repositories
- Management of electronic information within Livelink repositories
- Other procedures as required

Required Education/Training

Education typically refers to learning the 'WHY' something is. Training typically refers to learning the 'HOW' something works. The purpose of education is to motivate; the purpose of training is to explain.

ENMAX currently has two on-line courses that are designed to motivate. The first is the EIRMS course that focuses on the value of information management. The second is the ECM course which focuses on the need for electronic information management.

ENMAX has a number of on-line courses and classroom training that provide technical and administrative direction on using OmniRim and Livelink software.

Additional training courses will be designed and added to the LMS system as needed.

Ensuring Compliance

Developing policy and procedures, preparing and presenting education and training materials, conducting regular SIM audits, and putting in place guidelines and consequences to ensure compliance are all part of ENMAX's quality control and due diligence initiatives.

SIM audits of all key departments will be conducted on a regular basis as recommended by Internal Audit. IT policy and Compliance will work with Human Resources to ensure compliance.

Proposed Implementation Timetable

The concept for managing user email folders is based on a successful model employed by a large corporation based in the USA. Our first step in implementing the email SIM framework would be to arrange a second meeting with the Global Operations Manager for Halliburton to discuss lessons learned, issues to consider, communication and training, and detailed email programming to automate email transfer between zones and email deletion, and to ensure user notification of those pending deletions. The Halliburton email system has been in operation for over a year and is working well.

Step #2 would be to prepare a business case for the necessary IT design work (MS Outlook programming additions to handle user notification), autoclassification software selection and implementation, project management and IM design resources, and support to user departments to set up user folders. The set-up of user folders is also a product of the ECM project; however the 30 month ECM Phase 3 implementation timetable may be too long to meet the SIM project requirements.

Step #3 will involve a 'model office' project that is designed to test the concept within the existing IT Infrastructure and resolve any integration/implementation difficulties before proceeding to a 'pilot' project.

Step #4 (pilot project) will focus on testing the procedures within a selected user department to resolve issues with user requirements before a full rollout is undertaken.

Step #5 would consist of a full rollout to all key departments. As already indicated, there are some synergies with the ECM Phase 2 and 3 projects that will reduce the resources required for this step.

The implementation of steps one and two for the Electronic Information SIM framework (organization of 'H' and 'I' drives and the use of document management software) can be implemented ASAP. Step three (Livelink IRM software) is dependent on the implementation schedule for the ECM Phase 3 project.

Conclusion

The high rate of failure of ECM systems can be attributed to two factors; first the expectation that successful ECM systems can be implemented within 18 months or less, and second that implementing an ECM system will 'fix' the inherent problems that exist in a poorly designed manual system.

The implementation of an UEI Framework Initiative as proposed above, over a period of 6-12 months, will give structure to the existing unstructured electronic information system and more effectively lead into a subsequent ECM implementation that provides less cultural shock to the organization.

ICRM Membership Decertifications

Effective February 11, 2010, the Board of Regents of the Institute of Certified Records Managers voted to decertify the following individuals due to a lack of maintenance credits. Individuals decertified in accordance with the Constitution of the ICRM have no legal right to use the CRM credential. The decertified persons below are advised to cease such use, both personally and professionally, effective February 11, 2010. Procedures for reinstatement may be found at www.icrm.org.

The following people have been decertified due to lack of maintenance hours:

David P. Farneth
Diane L. Gregory
Adam H. Herbst
Dahl L. Luttrell
James B. Suber
Roderick C. Wallace

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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e-mail: recordspro@comcast.net

New CRMs

August 2009 Exam

Omitted from the Fall 2009 ProfessioNotes

Christine Figueroa, CRM
Fountain Valley, CA

November 2009 Exam

John S. Annunziello, CRM
Orillia, ON

Barbara L. Bellamy, CRM
Calgary, AB

Nancy J. Cologna, CRM
Lecanto, FL

Marvin W. Cross, CRM
Hermosa Beach, CA

Timothy Dominak, CRM
Naperville, IL

Lyn M Duvall, CRM
Cleveland, OH

Steven L. Ellis, CRM
Amherst, NH

Sofia Empel, CRM
Franklin Lakes, NJ

Kelly S. Hamilton, CRM
Surprise, AZ

Sheila A. Isaacson, CRM
New Brighton, MN

Todd P. Johnson, CRM
Idaho Falls, ID

Frank Richard Kotwa, CRM
Dunwoody, GA

Matthew S. Mitchell, CRM
Long Island City, NY

Linda L. Muller, CRM
Spring Hill, FL

Russell J. O'Hare, CRM
Fairbanks, Alaska

Heather L. Pearsall-Hubbert, CRM
North Ottawa, ON

Mary Ann Reandeau, CRM
New Lenox, IL

Patricia A. Reel, CRM
Golden, CO

Lorrie A. Robb, CRM
Idaho Falls, ID

Janice M. Schulz, CRM
Cincinnati , OH

Paula E. Sutton, CRM
Loveland, CO

Michelle S. VanAllen, CRM
Summerville, SC

ICRM Pre-Approved CMP Activities

Activity Date	Activity	Credit Hours	Sponsor	
02/24/2010	AIIM Electronic Records Management ERM Practitioner Course - ARMA NOVA Chapter - Arlington	6.50	AIIM	Arlington, VA
02/25/2010	The Northern Virginia Chapter of ARMA Seminar in Virginia - Arlington	5.50	The Northern Virginia Chapter (NOVA) of ARMA	Arlington, VA
03/03/2010	Fitting Vital Records Into the Puzzle	1.00	NARA, Central Plains Region	Kansas City, MO
03/03/2010	Medical Records Law in Arkansas - Little Rock	6.00	Lorman Education Services	Little Rock, AR
03/09/2010	ARMA Chicago - Strengthening Foundations. Applying Technology, Enhancing Connections	5.00	ARMA Chicago	Chicago, IL
03/09/2010	Wyoming Chapter of ARMA Annual Seminar	6.00	Wyoming Chapter of ARMA	Cheyenne, WY
03/10/2010	Medical Records Law in New York - New York	6.00	Lorman Education Services	New York, NY
03/16/2010	Applying Records Management Best Practices to Enterprise Content Management Technology	5.50	Central Missouri ARMA Chapter	Jefferson City, MO
03/17/2010	Document Retention and Destruction in Arkansas - Little Rock	4.00	Lorman Education Services	Little Rock, AR
03/18/2010	ARMA Metro NYC - Effective E-mail Management	7.00	ARMA Metro NYC	New York, NY
03/18/2010	ARMA Metro NYC - Get the Pieces You Need	5.50	ARMA Metro NYC	New York, NY
03/18/2010	Document Retention and Destruction in Iowa - Des Moines	6.50	Lorman Education Services	Des Moines, IA
03/18/2010	Medical Records Law in West Virginia - Charleston	6.00	Lorman Education Services	Charleston, WV
03/23/2010	Medical Records Law in Pennsylvania - Harrisburg	6.00	Lorman Education Services	Harrisburg, PA
03/24/2010	ARMA Austin 2010 Spring Seminar	6.00	ARMA Austin	Austin, TX
03/24/2010	ARMA Greater Indianapolis - eDiscovery Conference	4.00	ARMA Greater Indianapolis	Indianapolis, IN
03/25/2010	4th Annual TSCI Program on Getting Ahead of the eDiscovery Curve - Philadelphia	11.00	Sedona	Philadelphia, PA

ICRM Pre-Approved CMP Activities (continued)

Activity Date	Activity	Credit Hours	Sponsor	
03/25/2010	Medical Records Law in Michigan - Traverse City	6.00	Lorman Education Services	Traverse City, MI
03/25/2010	RIM: What You Need to Know	6.00	ARMA-Oklahoma City	Oklahoma City, OK
04/07/2010	Document Retention and Destruction in New Jersey - Parsippany	6.50	Lorman Education Services	Parsippany, NJ
04/08/2010	Information Governance: Tools for Records Managers	5.50	Metropolitan Maryland ARMA Chapter	Rockville, MD
04/13/2010	Vital Records Readiness	1.00	NARA, Central Plains Region	Kansas City, MO
04/14/2010	Medical Records Law in Greenville - North Carolina	6.00	Lorman Education Services	Greenville, NC
04/14/2010	Nebraska Chapter of ARMA Spring Seminar 2010	5.50	Nebraska Chapter of ARMA International	Omaha, NB
04/15/2010	The Big E: Electronic Records Management	4.50	ARMA Birmingham	Birmingham, AL
04/20/2010	Document Retention and Destruction in Indiana - Indianapolis	6.50	Lorman Education Services	Indianapolis, IN
04/21/2010	ARMAdison 2010 Spring Seminar	6.00	ARMA Madison Chapter	Madison, WI
04/22/2010	Medical Records Law in Washington - Seattle	6.00	Lorman Education Services	Seattle, WA
05/04/2010	Document Retention and Destruction in New Jersey - Cherry Hill	6.50	Lorman Education Services	Cherry Hill, NJ
05/05/2010	Medical Records Law in Connecticut - Bridgeport	6.00	Lorman Education Services	Bridgeport, CT
05/05/2010	Medical Records Law in North Carolina - Raleigh	6.00	Lorman Education Services	Raleigh, NC
05/05/2010	When Disaster Strikes: Disaster Response and Recovery for Records	1.50	NARA, Central Plains Region	Kansas City, MO
05/07/2010	Medical Records Law In Indiana - Fort Wayne	6.00	Lorman Education Services	Fort Wayne, IN
05/13/2010	Medical Records Law in Arizona - Tucson	6.00	Lorman Education Services	Tucson, AZ
05/18/2010	Document Retention and Destruction in Indiana - South Bend	6.50	Lorman Education Services	South Bend, IN

Regent, Public Relations and Professional Development Report

Rae Lynn Haliday, MBA, CRM

Dear ICRM Members,

We continue to move forward with the implementation of the Institute's new branding strategy. Since the fall issue of ProfessioNotes was published, the following items are being updated with the new logo and publishing style:

- Power Point presentations for CRM Examination Preparation Workshops
- Bibliography
- Certification Maintenance Program Brochure
- ICRM Booth
- ICRM Brochure
- Pins

Given the implementation of a new brand, the ICRM is currently reviewing and revising its Logo Use Guidelines. Once the new guidelines are Board approved, they will be available on the website. I apologize for any delay this may cause for those members interested in adding the ICRM logo to their business cards.

Current Marketing Committee members include:

Rae Lynn Haliday, CRM, MBA, Committee Chairman
Peter Kurilecz, CRM, CA (ICRM Public Relations Coordinator)
Mary Hilliard, CRM
Ginny Webster, CRM
Tom Wilson, CRM
Kathy Adair, CRM
Jeff Randolph
Karen Shaw, CRM
Deb Gearhart, CRM, FAI (ICRM President Elect)
Bruce White, PMP, CRM (ICRM Webmaster)
Annmarie Winston, CRM

left to right Karen Shaw, CRM, Rae Lynn Haliday, CRM and Kathy Adair, CRM
CRM Examination Preparation Workshop, St. Louis, MO February 18, 2010

Please welcome Karen Shaw, CRM, as our newest Committee member. Karen and Kathy Adair, CRM, will be co-presenting with me at the CRM Examination Preparation Workshop to be held in St. Louis, Missouri on February 18th, 2010. I am delighted to see our members so engaged in the organization, contributing their leadership skills and taking an active interest in mentoring potential CRMs and existing Candidates.

There are quite a few CRM Examination Preparation workshops that will be held during the months of February and March; make sure and check the Upcoming Conferences page on the website frequently as we are beginning to post notices of these events. If you represent an ARMA Chapter or industry specific association and are interested in implementing a formal program to promote the CRM certification, please contact me at (314) 646-4572 or haliday@stlzoo.org to discuss the various resources the ICRM has to assist you in this process.

ICRM Public Relations Coordinator Report

Petr Kurilecz, CRM, CA
Public Relations Coordinator

The ICRM LinkedIn group has 176 members. Seventy-six members were added during 2009. Membership in this group is restricted to those individuals who currently hold the CRM designation. If you are LinkedIn member, you can join the group via this link http://www.linkedin.com/e/gis/43121. The ICRM Registry is used to determine eligibility. If you have questions about the group send an email to pakurilecz@gmail.com

The ICRM-L Yahoo group was established in June 2001. Open to both candidates and members, there are currently 182 members down from a high of 219. The primary reason for the decrease is the removal of members whose emails were bouncing messages or were no longer a valid address. During 2009, 28 open positions were posted to the group.

The group's website is located at http://finance.groups.yahoo.com/group/ICRM-L/. To access the website you must be a member and have a Yahoo ID. To join just click on the "Join This Group button" located on the website. If you are a current member of the group and have questions about your account send an email message to ICRM-L-owner@yahoogroups.com

ICRM
Institute of Certified Records Managers