ICRM
Institute of Certified Records Managers

ProfessioNotes

SUMMER 2011

A Newsletter of the Institute of Certified Records Managers®

Table of Contents

ICRM Mission and Vision Statements

Vision: The Institute of Certified Records Managers ® (ICRM) is the certifying body for Records and Information Management (RIM) professionals, recognized and valued by employers and RIM practitioners world-wide

Mission: To certify RIM professionals as Certified Records Managers ® (CRM) and administer a certification maintenance program

President's Message

Debra Gearhart, CRM, FAI
President, ICRM

It has been a busy summer and it looks as though the fall will be one also! The ICRM has been working with many activities aligned with our Strategic Business Plan.

I have been fortunate to take part in many CRM Exam Preparation Workshops around the country hosted by some great ARMA Chapters including Boise Valley, Orange County, Greater New Orleans, St, Louis, Atlanta and Greater Michigan to name a few. The ICRM Board of Regents firmly believes that the information delivered through its Examination Preparation Product greatly assists CRM Candidates in preparing for the tests. If you're considering the credential or already a CRM Candidate, you may want to consider the ICRM Post Conference Examination Preparation Workshop held in conjunction with the ARMA Conference in Washington, D. C.

This event offers two full days of exam preparation. To register following the link:

http://www.arma.org/conference/2011/Registration.aspx

The Board of Regents would like to encourage all CRMs and Candidates in attendance at the ARMA Conference to attend the ICRM Business Meeting to be held from 6-7 p.m. in National Harbor 2 and 3 on Sunday, October 16, 2011. Following the meeting is the ICRM Annual Reception; you can still purchase your tickets on site at the ARMA International booth or at the door.

You should have all received the August 23, 2011 Press Release announcing that the Board of Regents recently voted to change the qualification standards to sit for the CRM exams. I have received both positive and constructive feedback regarding the changes.

ProfessioNotes

The Board of Regents has been working on several initiatives since the completion of the Institute's Strategic Business Plan during its fall 2010 Board meeting. Goal #1 of the Strategic Plan includes a Call to Action to look at qualification standards.

The Board of Regents considered the following strategic issues as part of that process:

1. The number of CRMs is not keeping pace with the increased demand for CRMs in the workplace
2. Desire to increase awareness of the value of the designation among employers and HR directors
3. Demonstrated need to effectively market to a changing target audience
4. Firm belief that the quality of our exam requires a depth of experience to pass
5. Our experience with applicants and pass rates allows us to understand that we can simplify the requirements to sit for the exam without diluting the qualifications of those who pass.

The Board of Regents voted unanimously to change the qualification standards, and feels that it was a business decision that had to be made. The reality is we do not have enough CRMs to fill the demand.

We believe the changes will increase the number of applicants and equalize recent losses created by attrition due to retirements and members changing professions.

At our Annual Business Meeting we intend to unveil some very exciting initiatives including:

1. The Alan Andolsen Award for Mentors
2. Licensed CRM Examination Preparation Workshop Product
3. A new Examination Outline

Do not miss this opportunity to learn all about it first-hand on Sunday, October 16, 2011, in National Harbor, Maryland. I look forward to seeing you there!

Call for Newsletter Articles & Information

Stephen M. French, MMC, CRM, Editor

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 (937) 535-1005 or by email at sfrench@morainehoh.org.

The deadline to submit articles for the 2011 Fall issue of ProfessionNotes is October 31, 2011.

Newsletter Publishing Schedule

ProfessioNotes is published four times a year (winter, spring, summer and fall) by the ICRM. Deadline to submit items for Fall issue of ProfessioNotes is October 31, 2011. Articles, inquiries, letters to the editor, or other comments should be directed to Stephen M. French, MMC, CRM, Editor, (937) 535-1005 or by email at sfrench@moraineoh.org.

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.

PR, Marketing and Professional Development

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

We appointed Stephen M. French, MMC, CRM, as the Institute's Newsletter Editor. Please join me in congratulating Stephen on his new position, he has already proved to be a valuable addition to our leadership team!

2011 was a busy year for the ICRM as the Board of Regents began to work on some of the first initiatives contained in the new Strategic Business Plan. In support of those initiatives and related decisions, there were many activities generated for PR, Marketing and Professional Development.

In response to the changes that were made in the qualification standards, effective August 31, 2011, all of the ICRM publications and website copy was updated to reflect the revised information.

In preparation for the deployment of the Institute's licensed CRM Examination Preparation Product in January of 2012, new sections have been developed on the ICRM website to accommodate future communications, publications and all related activities. An E-Newsletter for Candidates will be launched before or during the product deployment.

For those attending the Chapter Luncheon at the 2011 ARMA International Conference, or the Annual Reception, there will be formal presentations provided on the CRM Examination Preparation Product. Brochures will be provided during these events as well as the ICRM Booth. It has been awesome to work with many of the ARMA chapters to test this product pre-launch, and to build on the early work of some great Regent and CRM efforts in the field concerning exam preparation activities. We look forward to working with many of you in the near future to ensure the ICRM licensed CRM Examination Preparation Product is a success for all relevant stakeholders.

ICRM Exam Development Committee (EDC) Meeting in St. Louis, Missouri Septemeber 2011.

CRM Examination Preparation Workshop sponsored by the Zoological Registrars Association (ZRA) October 2011.

Scott Swanson, CRM, Rae Lynn Haliday, CRM, Duane E. Doppler, CRM and Brian Pillard, CRM.

The Board of Regents has approved the ICRM Logo Use Guidelines. In the near future, you will be able to login to the Institute's website and retrieve the trademarked logo and the Use Guidelines.

We hosted the ICRM Exam Development Committee (EDC) Meeting in St. Louis at the Saint Louis Zoo, September 16-18, 2011. Several of the Regents attending that meeting came in early to help present the St. Louis Chapter of ARMA's fall CRM Examination Preparation Workshop. Overall, it was a very busy week as the EDC put the final touches on a new Examination Outline. I was so impressed with the work of this Committee chaired by Don Schewe, Ph.D, CRM, FAI, ICRM Regent for Exam Development, there is no doubt in my mind that their charge is the "beating heart," of the Institute.

As an observer viewing the process of what it takes to maintain the certification process for the ICRM, I can say two things without hesitation, it's a ton of work and we can be very confident of the standards that are in place to ensure the exams stand on their own!

We've planned a great Annual Reception that includes a free gift for all attendees, a drawing and a wonderful opportunity for CRMs and Candidates to meet one another, network and celebrate achievements.

Please do not hesitate to contact me if you have questions on the CRM Examination Preparation Product or the Institute's recent and future marketing efforts.

Introduction to Twitter

(First in a Three Part Series)

Jesse Wilkins, CRM, Information Certified

The world is a-twitter about Twitter. Every newscast now asks and commentator now asks you to follow them on it. Shaquille O'Neal is there, and so is President Obama; Lady Gaga and Justin Bieber have more than 10 million followers; and even the President of ARMA International has joined the party. So what's the big deal about Twitter?

What are you doing?

If you're not familiar with Twitter, it's a Web-based service that invites its users to answer the question, "What's happening?" When Twitter first came online, the question was a more directed, "What are you doing?" The catch is that you only get 140 characters to do this. That may not seem like a lot of space, but it's based on allowing users to update their status with text messages from their phones. SMS has a 160-character limit, and Twitter keeps 20 characters of that for your username.

Here's a better definition of Twitter that comes from Ari Herzog. Ari is a social media consultant, writer, and marketer, and when his barber asked what Twitter was, he responded, "It is part text messaging and part blogging, with the ability to update on your cell phone or computer, but constrained to 140 characters." Note that this definition is itself 140 characters - belying the belief that Tweeting requires users 2 use txtspk.

One of the reasons Twitter has grown so rapidly is that it can be updated using your phone's text messaging capability, through the website itself, through a client on your smart phone, through desktop-based clients, by linking Twitter to other websites like Facebook or your blog, by email or instant messaging, or even through another application or service.

Twitter users can follow other users, but it doesn't have to be reciprocal; as of the end of September 2011, I follow 948 people, while 2,311 people follow me. There are a number of reasons for that, but one of the key aspects of Twitter is this asymmetrical model where you can follow whoever you want and see what they are saying, and anyone else can do the same for your Twitter stream.

You can make your updates private, but it's not nearly as useful that way, and I don't generally ask to follow accounts set to private unless I really know that person well.

The business case for Twitter

So let's go back to Ari's definition of twitter as a mix of texting and blogging. Twitter enjoys the immediacy and simplicity of texting while being a fundamentally public service. In other words, it's not siloed like texting, or its more business-friendly relative, email. In fact, Adina Levin from SocialText, an enterprise social media platform vendor, describes (enterprise) microblogging as "…more transparent than email."

That makes Twitter the perfect application for one-way broadcasting of short, fairly transitory types of information such as announcements of meetings or promotions; quick commentary on a link (along with the link itself); sharing resources via links; breaking news about the organization or the industry; and informal polling (e.g. "What should we have for lunch today?").

This has not been lost on first responders like the Los Angeles Fire Department. LAFD uses Twitter as a sort of reverse-911 system to keep its constituents informed. Granted, not everyone is on Twitter, so it's not a replacement for more traditional systems, but it is an additional system to reach more people more quickly.

Most of the blog posts about Twitter focus on the fluidity and speed of Twitter as a collaborative tool. A user could make a request for information or assistance, such as "Whenever I open X tool I get Y error message. What gives?" If I know the answer I can respond very quickly; if I don't, I can always forward to the people that follow me and perhaps one of them will respond. The request can be transmitted to a vast number of users very quickly.

Twitter makes it fairly easy to share links as well, and it is not uncommon for bloggers to link to their latest posts, analysts and vendors to Tweet links to new white papers, and so forth. Good resources get forwarded; bad or excessively sales-y resources don't.

One of the very popular use cases for Twitter deals with presentations. This takes two related forms. The first is for users to Tweet key points or salient details of a presentation they are attending. Everyone following them can read the points and understand at second hand what the presentation is about, how cpitch, etc. The second serves as a more immediate feedback loop and backchannel. In other words, while the presenter is presenting, users are Twittering instantaneous feedback based on the presentation. Either in real time or later, the presenter can respond to that feedback. Now extend that to a geographically dispersed project team on a conference call, and imagine that the feedback relates to a deliverable under discussion.

Twitter today, Twitter tomorrow!

In order to "get" Twitter, you really have to use it. My experience with Twitter is similar to many peoples' – I signed up, didn't follow anyone, saw nothing but a bunch of useless inanities, and quit using it. It took 8 months for me to give it another chance; this time, though, I followed about 20 people whose blogs I read regularly and spent some time lurking, just following quietly. Eventually I started to see the different ways in which it could be useful to me personally and professionally, as noted earlier, such that given a choice today between email and Twitter, and losing one of them permanently and irrevocably, I'd choose Twitter.

Twitter's not the right solution for everyone. But it can be a helpful resource for most people and I encourage everyone reading this who has not tried Twitter to give it a chance.

--Jesse Wilkins, CRM, Information Certified, is the Director, Systems of Engagement at AIIM International. For more information on this topic please contact him at jwilkins@aiim.org.

Clean Sweep!

Mimi Dionne, CRM &
Brice Sample, CRM

Candidates: did you know you can now take and pass all six parts within the same test cycle?

Mimi Dionne, former Regent of Exam Administration, designed the exam change with the approval of the Board. The ICRM's database manager programmed the registration language and the ICRM's business office quality-controlled the process. Mimi oversaw the February 2011 test cycle this year and she's delighted to report that two of our colleagues took advantage of this new approach and passed all six parts in February! Additionally, Brice Sample, current Regent for Exam Administration reports two additional Candidates from the May and August 2011 exams accomplished this same achievement. Brice stated, "these Candidates have made a "clean sweep!"

Congratulations to Lori Wells, CRM, Robert Conti, CRM, Michelle Kirk, CRM and Crista Reba, CRM, on their hard work and perseverance. Way to go!

Candidate, will your name be next?

ICRM Board of Regents

Chairman
Steven J. Golden, CRM
Apria Healthcare
26220 Enterprise Court
Lake Forest, CA 92630
Tel. 949-639-2831
e-mail:goldensjp@gmail.com

President
Debra K. Gearhart, CRM, FAI
286 Charlotte St.
Mulliken, Mi 48861
Tel. 517-649-2237
Cell: 517-282-4185
e-mail: crmfai16@yahoo.com

President-Elect
Juanita Skillman, CRM, FAI
2154 Ronda Granada, Unit N
Laguna Woods, CA 92637
Tel. 562-964-4677
e-mail: juanitaskillman@aol.com

Secretary
Martha W. Adcox, CRM
Eli Lilly and Company
Lilly Corporate Center
Indianapolis, Indiana 46285
Tel. 317-276-4787
e-mail:madcox01@comcast.net

Treasurer
Donna Jean G. Vitalie, CRM
AOL Legal Department
22000 AOL Way
Dulles, VA 20166
Tel. 703-265-3007
e-mail: donna.Vitalie@teamaol.com

Regent, Examination Development
Donald B. Schewe, CRM, FAI
120 Nails Creek Trail
McDonough Georgia, 30252
Tel. 770-898-5399
e-mail: dschewe@mindspring.com

Regent, Examination Administration
Brice Sample, CRM
State of Michigan
Records Management Services
3400 N. Grand River
Lansing, MI 48909
Tel. 517-335-9450
e-mail: sampleb@michigan.gov

Regent, Certification Maintenance
Rayanne Waggoner, CRM
Apple Inc
1 Infinite Loop MS 38-3RIM,
Cupertino, CA 95014
Tel. 408-974-1503
e-mail: regentcmp@att.net

Regent, Examination Grading
Mary Denker Hilliard, CRM
Advanced Micro Devices
7171 Southwest Parkway, B100.3
Austin, Texas 78735
Tel. 512-602-4702
e-mail: Mary.hilliard@amd.com

Regent, Certification Standards
Virginia A. Jones, CRM, FAI
PO Box 1143
Newport News, VA 23601
Tel. 757-926-1063
Fax: 757-926-1212
e-mail: vjones@nngov.com

Regent, Legislation and Appeals
David McDermott, CRM, FAI
479 W. Two Rivers Dr.
Eagle, ID 83616
Tel. 208-939-9187
e-mail: idahomcd@yahoo.com

Regent-Public Relations and Professional Development
Rae Lynn Haliday, CRM
Saint Louis Zoo
One Government Drive
St Louis, MO 63110
Tel. 314-781-0900, Ext. 4572
e-mail: haliday@stlzoo.org

Mentor Coordinator
Howard Loos, CRM, CDIA
Forensic Services
KPMG LLP, Houston
Tel. 832-335-8411
e-mail: howard.loos@gmail.com

Conference Coordinator
Daniel McGlynn, CRM
32 Constantine Way
Mt. Sinai, NY 11766
Tel. 631-474-5494
e-mail: pdmcglynn15@hotmail.com

Newsletter Editor
Stephen M. French, MMC, CRM
4200 Dryden Road
Moraine, OH 45439
Tel. 937-535-1005
e-mail: sfrench@moraineoh.org

Member in the Spotlight

Sherri L. Nystedt, CRM

This issue's member in the spotlight is Sheri L. Nystedt, CRM, Senior Compliance Manager for Janus Capital Group in Denver, CO. Sheri was born and raised in Bismarck, ND and currently resides in a suburb of Denver with her husband, two children and a Siamese cat. Sheri said, "I have lived in Colorado for 19 years and hope never to leave here! Having the Rocky Mountains in view during my commute is a great start to each day!"

Sheri's undergraduate studies focused on Information Management at the University of North Dakota where she received a Bachelor's of Business Administration degree, and later, her MBA. Seeing the writing on the wall, she achieved her CRM in July 2003.

Sheri was inspired and groomed for a career in Records Management at a young age. She states, "My first real experience in organizing information occurred when my dad started up a printing and design business during my early school years. Fast forward to high school graduation: my parents insisted that I select a major before going off to the University of North Dakota. While perusing the various options, I came across one titled "Information Management". It looked interesting because it was different than the typical business major options one usually sees. So I decided I would give it a try with the thought that I could always change majors if it was boring.

Fortunately for me, Dr. Mark Langemo, CRM turned out to be the professor! The level of energy and excitement he brought to class was so infectious you couldn't help but want to learn more about managing information! He always challenged us to push our own limits and think outside the box. So to me, he truly was the deciding point in my career direction and is the most exceptional teacher I have ever had. He was also responsible for introducing me to ARMA while I was in college, so I have him to thank for that as well!

"I have worked in records management for 20 years (amazing how time flies!), the last six years at Janus Capital Group. I have also been fortunate to have had the opportunity to work in both the public and private sectors in a variety of industries such as utilities, computer software, business supplies, government, and financial services."

When asked what advice she has for CRM candidates and what challenges she faced achieving your certification, Sheri replied that, "First and foremost, be confident and recognize the knowledge and experience you have! You might surprise yourself! Second, get yourself a great support network. I was pre-term with my second child just prior to sitting for Parts 1-5 of the exam. It was really hard to concentrate while balancing work, home life, and studying for the exam when you have doctors telling you "absolutely no stressful activities". The doctor's advice truly affected my study habits and I debated whether I should drop out of the exams and take them at a later date. I pushed forward with the thought that even if I only passed one, it was one less I had to take the next round. I ended up passing all five parts the first try thanks to my manager and co-worker who were very supportive of my efforts. Thanks Bill and Donna! (Both of whom are CRM's!)

"I also have to thank Ellie Myler, CRM from the Mile High Denver ARMA chapter who graciously took time out of her extremely busy schedule to mentor me for Part 6. There is no question that having a great support network makes all the difference!" (Editor's note: Ellie Myler has been mentioned as a mentor in many of the "Member in the Spotlight" articles. Kudos to Ellie for her dedication and selfless sharing of her time and abilities.)

Sheri reached into her past for some stories to share about her records management experiences. She says, "I remember when I was working as a records management consultant and had to run back and forth between two buildings during Hurricane Bob, knowing the project must go on! There was also the time I spent cataloguing and boxing up records to be sent to NARA that included Manhattan Project records. Talk about historical significance! On another project, the first day started when we walked into a warehouse that had boxes upon boxes of documents – all dumped in a somewhat pyramid-shaped pile with the first thought of: seriously – you want us to touch that? But touch and organize it we did! The humorous moments of my career were when I inventoried boxes that did not include documents, but instead, had items such as food, Christmas decorations, children's drawings, gym shoes and shorts, a pet leash, and a hairbrush.

Finally, there was the time I was called by a regulatory authority to give a deposition regarding authenticity of certain records. After the deposition, I found myself very happy to be on the regulatory authority's witness list and not the other side!

Overall, Sheri characterized her professional life this way: "Throughout my career I have had the pleasure to meet and work with so many people that have willingly shared their diverse (and sometimes extremely unique) range of experiences and knowledge. I have cultivated many valuable professional and personal relationships over the years and it amazes me how much of a positive and significant impact they have had on my career path and personal life. It doesn't matter how many years of experience you have in this field; the learning, networking, and knowledge-sharing truly never stops because there is always something new on the horizon to master. I have to extend my sincere appreciation and thanks to all my colleagues, friends, and family who have been there every step throughout my career – and continue to do so today!

NEW CRMs

Congratulations to the following individuals in the U.S. and Canada who earned their Certified Records Manager (CRM) designation by passing the Part 6 examination in August, 2011:

Peggy Dunn Bills, CRM , Arlington Heights, IL USA

Genevieve E. Cavallo, CRM, Seattle, WA USA

Clarence L. Elliott, CRM, Richmond, VA USA

Melinda M. Goodleaf, CRM, Seattle, WA USA

Shan Jin, CRM, Kingston, ON CANADA

Tamara Koepsel, CRM, Mableton, GA USA

Crista D. Reba, CRM, Crown Point, IN USA

William F. Sulima, CRM, Baltimore, MD USA

Dennis Trepanier, CRM, Red Deer, AB CANADA

Leontine M. Walker, CRM, Washington DC USAA

Examination Schedule Fall 2011 through 2012

Fall 2011: Parts 1-5, November 7-11, 2011 | Part 6, November 17, 2011
Registration Open: August 19, 2011 - November 3, 2011

Winter 2012: Parts 1-5, February 6-10, 2012| Part 6, February 16, 2012
Registration Open: November 28, 2011 - February 2, 2012

Spring 2012: Parts 1-5, May 7-11, 2012| Part 6, May 17, 2012
Registration Open: February 24, 2012 - May 3, 2012

Summer 2012: Parts 1-5, August 6-10, 2012| Part 6, August 16, 2012
Registration Open: May 25, 2012 - August 2, 2012
Fall 2012: Parts 1-5, November 5-9, 2012 | Part 6, November 15, 2012
Registration Open: August 24, 2012 - November 1, 2012

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.

Attention CRMs

Certification Maintenance Cycle:
Remember, in order to maintain the CRM designation, you must earn 100 hours every five years. Log onto the ICRM database to keep track of when the cycle ends and your total maintenance points.

Six Month Rule:

You must apply for Certification Maintenance within 6 months of the activity.

Decertifications

Certification has been revoked for Stephen M. Neilly

Decertified CRMs cannot use "CRM" or "CRM Retired" as it relates to their being a Certified Records Manager and cannot use the designation in official or unofficial transactions or activities.

How to Contact the ICRM

Mailing Address:

ICRM
403 East Taft Rd.
North Syracuse, NY 13212

Phone and Website:

(877) 244-3128
(Toll–free USA and Canada)
Alternate Telephone: (315) 234-1904
Fax: (315) 474-1784
Website: www.ICRM.org
E-mail: admin@icrm.org

ICRM Pre-Approved CMP Activities

Activity Date	Activity	Credit Hours	Sponsor	
11/2/2011	Contoural Fall Symposium	4	Contoural	Washington
11/3/2011	Nexus 2011	10	Image Source	Bellevue
11/4/2011	Medical Records Law In Indiana - Indianapolis	6	Lorman Education Services	Eau Claire
11/14/2011	WSNS3013 Records Management Policies and Practices in a Social Media World	1	ARMA International	Online
11/17/2011	Contoural Fall Symposium	4	Contoural	Chicago
11/18/2011	Medical Records Law in Florida - Miami	6	Lorman Education Services	Miami
11/18/2011	Medical Records Law in Florida - Miami	6	Lorman Education Services	Miami
11/4/2011	Medical Records Law In Indiana - Indianapolis	6	Lorman Education Services	Eau Claire
11/18/2011	Medical Records Law in Florida - Miami	6	Lorman Education Services	Miami