The ICRM Launches its Third Professional Certification: Certified Records Analyst (CRA)

By Nick De Laurentis, CRM, IGP

The CRA provides another opportunity to be a member of the ICRM. By achieving the CRA designation, records management professionals demonstrate a solid foundation in Records and Information Management (RIM); potentially on their way to attaining the CRM. CRAs are knowledgeable and experienced in active and inactive records systems. A CRA’s knowledge includes such areas as electronic records and information; regulatory compliance-related requirements; the lifecycle management of records and information; and more.

This certification provides an opportunity for immediate certification to those existing CRM candidates that have already successfully passed Parts 2-4 of the examinations; while still retaining the ability to continue on to the CRM. The CRA allows newly educated and experienced records management professionals the ability to become a member of the Institute; thereby improving their opportunities for career advancement and increasing the number of educated and credentialed millennials to meet the demand for RIM and Information Governance (IG) positions in the global marketplace.

“We are excited to deliver the CRA certification to the RIM profession! This new certification follows our time-tested approach and allows for more professionals to obtain a value-added RIM credential while promoting the continuance of their individual development. We fully expect many to use the CRA as a spring-board to achieving their CRM over a timeline that meets their individual needs.”

-Brice Sample, CRM -ICRM President

A CRA may vote in elections of the ICRM, may not hold office but can serve as a member or chairman of an ICRM Commission, Committee or Taskforce, may attend the ICRM Business Meeting and may attend the ICRM Annual Reception held annually at the ARMA Conference. Further, CRAs are granted access to the ICRM website, the membership directory and all publications and information provided as a benefit of ICRM membership.

Candidates for the CRA, upon submitting an online application to the ICRM, will be approved to sit for Parts 2-4 if they properly document achievement of a 4-year (bachelor’s degree) from an accredited institution of higher education and also demonstrate one-year of professional Records and Information Management (RIM) experience. Alternately, one year of professional Records and Information Management experience can be substituted for each year of college education.

Founded in 1975, the Institute of Certified Records Managers is an international certifying organization of and for professional records managers. The Institute confers three designations: the Certified Records Manager (CRM); the Certified Records Manager/Nuclear Specialist (CRM/NS); and now the Certified Records Analyst.
ICRM Leadership Roster

ICRM Board of Regents

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e-mail: president-elect@icrm.org

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**Business Manager**
Steven J. Golden, CRM  
e-mail: business-manager@icrm.org

The Member in the Spotlight is taking a break until after the winter issue.

Permission to reprint articles from ProfessioNotes is given with credit to the author and the ICRM.

Erratum: In the summer issue of ProfessioNotes in the Resources You Can Use article the SAA was incorrectly identified as the certifying agency for archivists. The Academy of Certified Archivists serves this purpose and can be contacted at www.certifiedarchivists.org.
Ellie Maier achieved her certification as a Business Continuity Professional (CBCP) in 1994 and as a Certified Records Manager (CRM) in 1996. She holds a B.S. degree in Marketing from Westminster College in Salt Lake City, Utah, and has been a professional records manager for the last 27 years working in over 11 different industries in that capacity. She received the ARMA International Britt Literary Award in 2007.

Ellie is the ICRM Committee Manager for the Houston Chapter of ARMA, and in that role leads CRM Exam Prep Workshops, discussions and study groups. She has presented and mentored at multiple conferences hosted by the Houston Chapter of ARMA. She has also delivered, “Take Your Career to the Next Level” and hosts casual meetings through the “Wine Cave” group where CRM candidates as well as new CRMs meet at eateries in the area. Further, she has worked with the Houston Chapter of ARMA to develop a CRM resource page on its website.

Ellie has been an ICRM mentor, coach, presenter and grader since 2006 and has assisted over 25 candidates, 23 of which are now CRMs.

The 2016 Alan Andolsen Award was presented to Ellie Maier, CRM, CBCP, on Saturday, September 24, 2016, during the Annual Business Meeting hosted in San Antonio, Texas.
La ARMA Nostra Presents 2016 RIM/Information Governance Certification Reimbursement Awards

By Nicholas J. De Laurentis, CRM, IGP

On August 18th, the Institute of Certified Records Managers (ICRM) announced the availability of six La ARMA Nostra scholarships administered through the ARMA International Educational Foundation (AIEF). The funding for these awards is an endowment established in partnership with the AIEF through the collective efforts of La ARMA Nostra members to which all active ICRM Board members and other records professionals (many of whom are CRMs) donate annually.

These awards were:

• Presented in remembrance of Jeffrey Baldwin, CRM and three will be presented in remembrance of Komal Gulich, CRM, IGP. Jeffrey and Komal, long-time champions of the RIM/IG profession and the CRM certification, passed away from cancer in 2014.
• A one-time award of $500 each for individuals who have successfully completed or are actively pursuing their Certified Records Manager (CRM) certification, Information Governance Professional (IGP) certification, or other related records and information management (RIM)/ information governance (IG) certification.
• Available to individuals in all geographic locations; however, weight was given to applicants from ARMA’s Great Lakes Region.
• Available to anyone who is actively pursuing or has obtained a professional RIM certification; however, weight was given to those obtaining/pursuing their CRM over other certifications.

Applications were submitted for the successful completion of any part (e.g., CRM Part I has been passed successfully) so long as the applicant is still actively pursuing the designation (candidate in good standing) and completion of part or all of the certification occurred after January 1, 2015. Eight applications were received for the six available reimbursement awards.

On August 25, 2016, the following 2016 La ARMA Nostra RIM/IG Certification Reimbursement Awards were selected and presented to the recipients prior to the ARMA Conference in San Antonio. Four winners are currently pursuing their CRM certification with the other two recipients attaining their CRM earlier this year.

Jeffrey Baldwin, CRM Memorial Reimbursement Awards to:
• Jennifer Baranski (CRM Candidate, ARMA Great Lakes Region)
• Cori Brock (CRM 2016, ARMA Midwest Rocky Mountain Region)
• Philip Guenther (CRM Candidate, ARMA Mid-Atlantic Region)

Komal Gulich, CRM, IGP Memorial Reimbursement Awards to:
• Margot Note (CRM 2016)
• Valerie Raiche (CRM Candidate, ARMA Midwest Rocky Mountain Region)
• Deborah Robbins (CRM Candidate, ARMA Southwest Region)

These reimbursement awards were the first of their kind for La ARMA Nostra, with three annual graduate-level scholarships awarded in the amount $3,000 each in 2011, 2012, and 2013. For more information on available scholarships, please visit: www.armaedfoundation.org

Election: ICRM Board of Regents Election 2016
Results by Question
ICRM President Elect
Total Voters: 1148

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Total Voters: 1148

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Regent, Examination Development
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By Rae Lynn Haliday, CRM

The Institute of Certified Records Managers (ICRM) has worked extensively this past year to expand and develop partnerships that benefit its membership and candidates. As an extension of the updates that were provided during the 2016 Annual Business Meeting please see the summary below.

The ICRM would like to thank Access® for sponsoring the ICRM handouts for Designation Academy and its contribution to the Annual Reception.

Louisiana State University (LSU) will launch its new Graduate Certificate in Records and Information Management in the spring of 2017. LSU intends to cover the basics that are included on the CRM examination outline.

As a result of our partnership the ICRM supports the LSU faculty and students in this endeavor through:

- Curriculum content review and guest speakers
- ICRM candidacy for students enrolled in the program (upon receipt of application and fee)
- Options for students to earn ICRM certification on an expedited timetable as part of the RIM certificate program.

More information regarding application for and admission to this certificate program may be found at this link, or you may contact Dr. Tao Jin via taojin@lsu.edu or at (225)578-1486.

Partner Events for 2016

- ARMA – September 2016 Designation Academy, San Antonio, Texas
  ICRM Facilitators: Kiersten Ward (Chairman, PDC), Andrew Ysasi (Member, EDC), Mary Francis Janicik (Member, EDC)
- ARMA Canada – June 2016 CRM Presentations and ICRM Booth, Halifax CANADA
- ICRM Facilitators: Rae Haliday (Board Member), Sheila Taylor (Member)
- MER – May 2016 Pre-con and ICRM Booth at MER Conference, Chicago, IL
  ICRM Facilitators: Nick DeLaurentis (Board Member), Kiersten Ward (Chairman, PDC) and Debra Gearhart (Member, EDC)
- NAGARA – July 2016 Pre-Con and ICRM Booth at NAGARA Conference, Lansing, MI
  ICRM Facilitators: Kiersten Ward (Chairman, PDC), Debra Gearhart (Member, EDC), Andrew Ysasi (Member, EDC)
- NIRMA – August 2016 Pre-Con and ICRM Booth at NIRMA Conference, Summerlin, NV
  ICRM participants: John Krysa, (Chairman, SAC), Blake Richardson (Member, EDC) and Deb Armentrout (Member, SAC)

With the Institute's participation in these outstanding partner events, it was able to reach more than 100 prospects and/or candidates. The ICRM thanks all of its Board and Committee members and CRMs at large who attended and participated on behalf of the Institute.

The ICRM plans to attend these same events in 2017 as well as additional events currently in development and will incorporate information about its newest credential, the Certified Records Analyst (CRA).

The ICRM Strategic Alliance Committee (SAC) is working on several major proposals intended for approval, integration and deployment by late 2017. Updates on these initiatives will be reported to the membership as milestones are developed.

**strategic Alliance Committee**

John Krysa, CRM, Chairman
Rae Lynn Haliday, CRM, Board Liaison
Deb Armentrout, CRM, IGP, Member
Alexander Webb, CRM, IGP, Member
Teri Mark, CRM, CMP, Member

The SAC has recently confirmed that the ICRM will host a booth at the E-Records Conference, Austin, Texas, to be held on Friday, November 4, 2016. The Texas State Library and Archives Commission (TSLAC) and the Texas Department of Information Resources (DIR) co-sponsor this annual one-day conference for state agency and local government officials involved in the management of electronic records. The intent of this educational event is to improve electronic records management in Texas government through the use of statewide standards and best practices. Use the link below to access the program and all related information. [https://www.tsl.texas.gov/sirm/training/conferences/erecords2016.html](https://www.tsl.texas.gov/sirm/training/conferences/erecords2016.html)

Please let me know if you have any questions concerning the ICRM and its strategic partnerships.
PROJECT MANAGEMENT FOR RECORDS MANAGERS

ProfessioNotes is pleased to announce a series of articles on project management for records managers, written by Margot Note, CRM. Margot authored Project Management for Information Professionals (Elsevier, 2015) to examine the unique project issues that affect information management professionals. After a decade of directing the archives and records management programs at an international nonprofit, she founded a consulting practice to help organizations and small businesses with their information and project management needs.

In today’s competitive business environment, understanding and employing project management principles is a necessity for records managers. Project management (PM), like records management, is based on established principles and guidelines. PM practices enhance records management, propelling projects into something that can transform organizations.

The series will focus on six key areas of project management: selection and prioritization, leading and managing teams, planning and scheduling, budgeting and performance, communication and documentation, and completion and review.

Have a burning question about project management? Contact Margot at margotnote@gmail.com

ICRM CODE OF ETHICS

Certified Records Managers should maintain high professional standards of conduct in the performance of their duties. The Code of Ethics is provided as a guide to professional conduct.

1. Certified Records Managers have a professional responsibility to conduct themselves so that their good faith and integrity shall not be open to question. They will promote the highest possible records management standards.

2. Certified Records Managers shall conform to existing laws and regulations covering the creation, maintenance, and disposition of recorded information, and shall never knowingly be parties to any illegal or improper activities relative thereto.

3. Certified Records Managers shall be prudent in the use of information acquired in the course of their duties. They should protect confidential, proprietary and trade secret information obtained from others and use it only for the purposes approved by the party from whom it was obtained or for the benefit of that party, and not for the personal gain of anyone else.

4. Certified Records Managers shall not accept gifts or gratuities from clients, business associates, or suppliers as inducements to influence any procurements or decisions they may make.

5. Certified Records Managers shall use all reasonable care to obtain factual evidence to support their opinion.

6. Certified Records Managers shall strive for continuing proficiency and effectiveness in their profession and shall contribute to further research, development, and education. It is their professional responsibility to encourage those interested in records management and offer assistance whenever possible to those who enter the profession and to those already in the profession.
By Linda Buss, CRM

Luciana Duranti is Professor of archival theory, diplmatics, and the management of digital records in the master's and doctoral archival programs of the School of Library, Archival and Information Studies of the University of British Columbia (UBC). She is also Faculty Associate Member of the UBC College for Interdisciplinary Studies, Media and Graphics Interdisciplinary Centre and an affiliate professor at the University of Washington in Seattle, WA. Duranti is Director of the Centre for the International Study of Contemporary Records and Archives (CISCRA—www.ciscra.org) and of InterPARES, the largest and longest living publicly funded research project on the long-term preservation of authentic electronic records (1998-2018), the Digital Records Forensics Project, and the Records in the Clouds Project. Her areas of expertise include the design of information systems and services. In the late 1980s she authored two pieces for the Records Management Quarterly, precursor of ARMA’s periodical Information Management, pertaining to the journey, or in her words ‘odyssey’, of records managers. Here is a summary of Professor Duranti’s scholarly article, reviewed by the author and edited for space. We start here with Part I which takes us from 4000 B.C. up to Hammurabi’s reign in 1750 B.C.

Theodore Schellenberg’s definition of a record as “documentary material made and received … in connection (with an institution) legal obligations….” clearly describes the functions and mission of the early keepers of the record and is still applicable. Our ancient brethren supervised the compilation, organization and indexing of records by a number of staff that would make a modern records manager envious. In such high regard was the keeper of the records in Mesopotamia that this role was paid five times more than the head of police. This suggests that the keeper of records was a prestigious profession. They were among the elite; they were the rare highly educated individuals from the uppermost ranks of society. As such they commanded the highest salaries.

The odyssey of records management begins around 4000 B.C. with the dawn of civilization. These articles look at the birth and development of records management over six millennia. Our story begins in the ancient Uruk Period (circa 4100 B.C. – 2900 B.C.) in Sumer, Mesopotamia. Six thousand years ago a man named Aman, keeper of the records, rose to become High Priest and eventually King of Uruk. He preserved his title ‘keeper of the records’ as he climbed the ranks in order to maintain the “intellectual distinction given him by his previous profession”.

It is possible that Gilgamesh, the subject of the eponymous epic poem, was initially the keeper of the records in a process that led eventually to kingship. As today, ancient record keepers protected the rights and responsibilities of their employers, guarding the information in a medium few of us will ever handle in our lifetime. Even then, their title was held in esteem. Dr. Duranti determined that, even before writing, the ancient records keepers were individuals who were tasked with remembering rules, contracts and sentences, and reciting them back to those who required their very specific knowledge. They were called remembrancers. This was more than an oral history; it was the preservation of a civilization’s administrative, legal and financial transactions.

As civilizations became more complex, systems of writing were employed to preserve the increased volume of civil, legal and administrative transactions. Scribes recorded business and administrative records on materials as flimsy as leaves (for transitory records) and durable like stone, clay and metals (for permanent records). Record keepers in temples, homes of high ranking officials and royal palaces created records which were then organized in a manner that would facilitate easy retrieval. Researchers discovered unbaked clay tablets and hypothesized that they were records of temporary value. Baking or not the tablets may have been a way of implementing a records retention policy!

As early as the third millennium B.C., metadata were in use referring to the contents of records with properties such as subject and form of the records, their date, the creating office, a classification code, and quantity. In Mesopotamia and Egypt operational and housekeeping records were segregated. For example, in Syria six repositories were found with records from six distinct functions: administrative; legal and financial; judicial and notarial; records in foreign languages; records relating to relationships with foreign countries; and records created by the various records offices to be controlled and distributed (similar to today’s mail room). In Egypt, political prestige was attributed to the records keeper by nominating the Egyptian Grand Vizier head of the chancery, registry office and records center. Mergers and acquisitions that resulted from new dynasties or conquests could result in reclassification of records or reorganization according to the needs of the current administration. Keepers of the records during the reign of the Babylonian king Hammurabi (1792 B.C. through 1750 B.C.) sought to integrate records from prior dynasties in their own records system to ensure historic records were available for reference. A copy of Hammurabi’s laws, engraved on a casting of the original stele (stone slabs or columns), is on display at the Oriental Institute at the University of Chicago.

Enjoy Part II in the winter issue of ProfessioNotes.
SCENES FROM THE 2016 ARMA CONFERENCE

Tom Corey, Eugenia Brumm and John Krysa at ARMA Conference.

NEW CRMs FROM AUGUST 2016 EXAM CYCLE
PLEASE WELCOME OUR NEWEST CRMs

Michelle Anderson
Furlong, PA

Erinn Barefield
Bayou Vista, TX

Donna L. Bowles
Mesa, Arizona

Maria Catalan
Chino Hills, CA

Jennifer Chapman
Virginia City, Nevada

Keith Christianson
Howell, Michigan

Brent Dockter
Silver Spring, MD

Andrea Donohue
Bellmore, NY

Richard Eckel
Rochester, NY

Caroline Higgins
Houston, Texas

Linnea Knapp
Chicago, Illinois

Lik Chi Ritchie Lai
Langley, British Columbia

Andrea C. Lipari
Conroe, TX

Emily Martin
New Orleans, Louisiana

Angela Ossar
Austin, Texas

Justin Packer-Waite
Federal Way, Washington

Vicki M. Pratt
La Palma, CA

Monica Reichert
Calgary, Alberta

Jennifer Singer
Chicago, Illinois

Marianna Symeonides
Austin, TX

Sharon Vaughn
Greenwood Village, Colorado
New CRAs

Please Welcome Our First CRAs

William J Ackerman
Falls Church, Virginia
Andrea May Arnold
New Westminster, British Columbia
Mary K. Barclay
Hutto, Texas
Jennifer J Barsetti
West Des Moines, Iowa
Eva Beyer
Stony Plain, Alberta
Marilyn D Boyd
Grand Rapids, Michigan
Jociel Brooks
Dallas, Texas
Azure G. Brown
Austin, Texas
Jacqueline Y Brown
Charlotte, North Carolina
Christine Burnett Calton
Lehi, Utah
Sheila R. Campbell
Circleville, Ohio
Natalia Chebel
Kitchener, Ontario
Cary B Cochrell
Irvine, California
Charlotte L. Collins
Houston, Texas
Greg F. Cornwell
Philadelphia, Pennsylvania
Jamie D. Corona
Raleigh, North Carolina
Emilie S Costan
Sacramento, California
Frederick Earl Adam Cullum
Prince George, British Columbia
Bernard J. Cusner
Pelham, New York
Ann Danet-Ebrahimi
Houston, Texas
Tammy A Davey
Qu’appelle, Saskatchewan
Anne L Dunn
Kalamazoo, Michigan
Joanie L Erickson
Loves Park, Illinois
Lynna J. Ferrari
Dallas, Texas
Cherise M. Forbes
Dacula, Georgia
Helena A Gilbert
Fairfax, Virginia
Hannah L Gray
Tulsa, Oklahoma
Christopher Gus Gunias
Parker, Colorado
Jami L. Guthrie
Rapid City, South Dakota
Jeremy S. Haiar
Locust Grove, Georgia
Joanna Hammerschmidt
Lenexa, Kansas
Tracy D. Hansen
North Ogden, Utah
Frank Hernadi
Garland, Texas
Karen W Heuberger
Charlotte, North Carolina
Rolland T Hogue
Bartow, Florida
David W. Honeman
New Orleans, Louisiana
Jacque S. Hornung
Raymond, Nebraska
Adrienne Horrigan
Chicago, Illinois
Helen E Hosein-Mulloon
St Clair, Port Of Spain
Lauren Leah Huston
Calgary, Alberta
Kiwa L. Jefferson
Las Vegas, Nevada
John A. Jenner
Boynton Beach, Florida
Blair R. Johnson
Kingston, Ontario
Julia Marie Johnson
Austin, Texas
Mark J Keli
Detroit, Michigan
New CRAs

Please Welcome Our First CRAs

Stephanie K. King  
Rockwall, Texas

Lisa M. Lubak  
Erie, Pennsylvania

Evangelina Martinez  
Austin, Texas

Albert C Minnick  
Silver Spring, Maryland

Sheri L. Naegele  
Wichita, Kansas

Laurie A Neal  
Putnam, Connecticut

Matthew J Oftedahl  
Vancouver, Washington

Sheila K. Pearcy  
Carlsbad, New Mexico

Craig D Pedersen  
New York, New York

Alejandro Perez  
North Bergen, New Jersey

Valerie A. Raiche  
Mahtowa, Minnesota

Elena V. Ramirez  
Pasco, Washington

Glenn David Reasoner  
Burbank, California

Larry A Reitz  
New Market, Maryland

Vanessa Ressler  
Kingston, Washington

Daniel E. Rezzuti  
Hawthorne, California

Deborah R Robbins  
Pearl Harbor, Louisiana

Douglas A. Rollo  
Kennesaw, Georgia

Buneeta A. Samek  
Erie, Colorado

Andrew J. San Agustin  
Everett, Washington

Meredith L. Scheiber  
Rockville, Maryland

James R Sheppard  
Washington, District of Columbia

Keith C.S. Siu  
Honolulu, Hawaii

Lori I Smith  
Smyrna, Georgia

Harrison E Standley  
Tampa, Florida

Elena Tanner  
Sugar Land, Texas

Jeannie Taylor  
Mesa, Arizona

Tanya R. Totemoff  
Anchorage, Alaska

Ruben D Vargas  
Maricopa, Arizona

Susanne M. Veal  
Rochester, New Hampshire

Andrew J Visser  
Boise, Idaho

Clifton Weidel  
Cibolo, Texas

Sara P Wilder  
Santa Cruz, California

Natalie E Windle  
Elma, Washington
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It is your life. It is your career. It is your certification.

**CRM**

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

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

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

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