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How to Contact the Institute of Certified Records Managers (ICRM)

Mailing Address: ICRM
230 Washington Avenue, Suite 101
Albany, NY 12203

Phone and Website:
(877) 244-3128
Toll-free USA and Canada
Alternate Tel: (518) 694-5362
Fax: (518) 463-8656
Website: www.icrm.org
E-mail: admin@icrm.org

From the President...

President, Wendy McLain, CRM
Fellow ICRM members:

Your Board of Regents convened in Grand Rapids, MI the last weekend in April for the spring board meeting. It was a weekend packed with new ideas, lively discussion, and lots of coffee. It is customary for the Board to review our strategic plan with the new board members each spring. As we review, we note accomplishments and reprioritize what we want to do to enhance the value of the ICRM for our members and candidates.

Our strategic plan is built on four pillars:

1. Grow Membership – I am happy to report that our membership numbers illustrate success on this goal. Our strategic alliances committee continues to build partner relationships to attract new candidates and we are seeing continued excitement about the Certified Records Analyst credential. CRA members have increased to nearly 100 since our announcement last fall.

2. Diversify Revenue – The finance committee was tasked to update the current revenue breakdown report and propose a model for the percentage of each non-dues revenue stream.

3. Increase Relevance – Our website has been in transition for a while now, and our new website review committee is working to get it fully migrated to the new platform this year. It serves as an important tool for getting our message out.

4. Modernize Governance & Processes – Ok, so this one may not sound as sexy as the other three goals, but trust me, it is important. This goal is all about streamlining what we do so that we are continually improving the ICRM.

Do you want to help? To continue to grow, diversify, stay relevant and continually improve, the ICRM needs you. If you are looking for an opportunity to be more involved in your Institute, please reach out to any board member or contact the Administrative office. We will be happy to suggest available opportunities that match your skills and interests. I look forward to hearing from you!
ICRM Board of Regents

Chair
Brice Sample, CRM
PO Box 30026
3400 N. Grand River Ave.
Lansing, MI 48909
Tel. 517-335-9450
e-mail: chair@icrm.org

President
Wendy McLain, CRM
Valero Energy Corporation
e-mail: president@icrm.org

President-Elect
John Krysa, CRM
117 Beech Ct
Littleton, NC 27850
Tel. 252-586-7560
e-mail: president-elect@icrm.org

Secretary-Treasurer
William W. LeFevre, CA, CRM
Wayne State University
5401 Cass Avenue
Detroit, MI 48202
Tel. 313-577-2789
e-mail: secretary-treasurer@icrm.org

Regent, Examination Development
Andrew Ysasi
MS, CRM, CIPM, CIPP, FIP, PMP, IGP
Kent Record Management, Inc.
1950 Waldorf NW
Grand Rapids, MI 49544
Tel. 616-588-2362
e-mail: exam-development@icrm.org

Regent, Examination Administration and Grading
Laurie Carpenter; CRM, IGP
611 N. Brand Blvd.
Glendale, CA 91203
Tel. 818-553-7466
e-mail: examadmin@icrm.org

Regent, Applicant and Member Relations
Nick De Laurentis, CRM, IGP
12405 Vanderberg Place
Crown Point, IN 46307
Tel. 219-663-8072
e-mail: certification-standards@icrm.org

Regent, Legislation and Appeals
Paula Sutton, CRM, IGP
Records Matter, LLC
1004 W. 32nd Street
Loveland, CO 80538
Tel. 970-776-0285
e-mail: legislation-appeals@icrm.org

Committee Chairs

Mentor Coordinator
Howard Loos, CRM, CDIA
Brigham Young University
6822A HBLL
Provo, UT 84602
Tel. 801-442-2161
e-mail: mentor@icrm.org

Professional Development Coordinator
Kiersten Ward, CRM
Tel. 313-667-8235
e-mail: examprep@icrm.org

Newsletter Editor
Linda Buss, CRM
Tel. 303-579-8065
e-mail: newsletter-editor@icrm.org

Public Relations Coordinator
Peter A. Kurilecz, CRM, CA
e-mail: PR-Coordinator@icrm.org

Webmaster
Bruce L. White, CRM, PMP
e-mail: webmaster@icrm.org

Marketing Committee Coordinator
Katie Voldal, MPS, CRM, IGP
Sidley Austin, LLP
1501 K Street, NW
Washington, DC 20005
Tel. 202-736-8233
e-mail: kvoldal@sidley.com

Strategic Alliance Committee
Rae Lynn Haliday, CRM
Saint Louis Zoo
1 Government Drive
St. Louis, MO 63110
Tel. 314-646-4572
e-mail: strategic-committee-chair@icrm.org

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**Candidate Coach Spring Issue 2017**

**Part 6 Mentoring by Howard Loos, CRM, IGP, ICRM Mentor Coordinator**

Hello candidates and mentors. If you are a candidate and need a mentor, please reach out by email to mentor@icrm.org and request a mentor. If you know of someone in your local area who is willing to serve as a mentor, please let me know. CMP credits can be earned for mentoring activity.

The May exam cycle had the largest number of requests for mentors than I can remember. I greatly appreciate those who agreed to serve and help meet this demand. Performing this service is an opportunity to give back and provides candidates with needed guidance through the Part 6 exam process. In addition, this service enables mentors to receive three ICRM maintenance credits for each mentoring assignment. If you are serving as a mentor and have not yet registered with the ICRM Mentor Coordinator, please do so by sending an email to mentor@icrm.org. Registering is a simple but necessary step to earn your CMP credits. When emailing the mentor coordinator, please include your candidate’s name, email address and in which exam cycle your candidate plans to take the Part 6 exam.

For those of you who would like to serve as a mentor, please send an email to the ICRM Mentor Coordinator, expressing your desire to serve. The following Q/A should help you understand the mentor role:

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**What are my time commitment and duties as a mentor?**

- Most mentors spend a total of two to four hours working with their assigned candidate over a one or two-month period.
- The main duties of the mentor are to answer questions related to the examination process and provide feedback on one or two practice exams completed by the candidate. Most communication is done via email.

**What resources are available to help me?**

- Practice exams with answer guides – Each year the ICRM retires two exams. One or more of these exams are given to candidates who participate in the mentoring program. The grader’s instructions are provided to the mentor to assist in the practice exam feedback process. When you are assigned as a mentor, you will be provided with a copy of the practice exams.
- Part 6 Study Guide – This study guide is designed to provide guidance to both mentors and candidates. You will receive this study guide during your mentor assignment.
- ICRM Exam Preparation Resources are available at [http://www.icrm.org/exam-preparation-resources/](http://www.icrm.org/exam-preparation-resources/). For Part 6, this webpage includes a link to a Part 6 Sample Business Case (Practice Exam) as well as strategies for passing the exams.

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**Spotlight on ICRM Legislation and Appeals (RLA)**

By Paula Sutton, CRM, IGP

**Regent, Legislation and Appeals**

As Regent for Legislation and Appeals, my responsibility is for the administration of the appellant process and overseeing the governance of the ICRM.

**So what does that really mean?**

1. **Governance**
   - Ensure meetings follow Parliamentary procedure
   - Respond to queries from ICRM officers on rule and governance
   - Review and update ICRM Constitution and By-laws as needed
   - Draft policies related to governance and board operations
   - Website Review Committee Chair

One of my duties is to ensure our meetings are conducted with civility and under proper procedures, which is easy due to a great group of Regents this year. We have updated our by-laws to reflect the new CRA designation and modernized our Code of Conduct. I also confirm that our policies and procedures are written and maintained in a consistent manner.

2. **Appeals**
   - Chair for the Appeals committee and oversee the appellant process

In order to protect the confidentiality of the appellant, this process is conducted under tight controls and utmost privacy. Information presented is often times sensitive and the RLA strives to protect the privacy of the appellants as well as the committee members.

**What can be appealed?**

Just about anything can be appealed but there must be a legitimate reason to file the appeal with substantiated information.

Continued on page 8
### Brief History of Paper Manufacture

By Linda Buss, CRM

Paper, that ubiquitous tangible that fills office supply stores and our own warehouses, has evolved from a communication medium of the early imperial and majestic heads of state to an inexpensive tool for beginning writers in elementary schools. The demand for inexpensive paper in the middle of the nineteenth century resulted in the use of less than optimal raw materials with the subsequent deterioration of paper quality. Wood pulp-based paper has satisfied the demand for quantity but sacrificed durability and permanence with its acidic pulping and bleaching techniques. Consequently many documents written or printed after the mid-1850s are in a serious state of disintegration due to acid migration. Here is a brief history of the manufacture of paper, a medium that has outlasted any other.

Paper mills have been in existence in Europe since 1150. The composition of paper at that time was rag made from flax or hemp, and sized with gelatin. Even at that early date there was concern about paper’s durability and fragility. Compared to parchment or vellum which could be scraped and reused, paper was expensive. Paper was made cheaper in the early 15th century when the demand for linen undergarments replaced those made of wool, thus providing an inexpensive source of linen rags.

Prior to the mid-nineteenth century in the United States, paper was made primarily of linen rag, and other long-staple plant fibers such as hemp (Cannabis sativa), flax (Linum usitatissimum) and cotton (Gossypium spp.). In an attempt to bring down the price of paper, some innovators tried okra (Hibiscus esculentus), sugar cane bagasse (Saccharum officinarum), cabbage stalks (Brassica oleracea), bamboo (Bambusa arundinacea and Dendrocalamus strictus), and other vegetable matter as raw materials. Even nests from paper wasps (Polistes fuscatus) were used. (I wonder who got to collect those?)

Rags were the only significant source of papermaking fiber, with high-grade cotton and, less frequently, linen rags used to make the finer grades of bond. Chinese laborers used machetes to chop up discarded garments to provide raw materials for the. Occasionally they would encounter a gold coin secreted in the lining of the garment. One paper mill owner in Massachusetts, desperate for raw materials during the Civil War, imported Egyptian mummies and used the cloth wrappings and papyrus filler to make paper.

It wasn’t until 1867 that wood pulp of sufficiently fine grade was made available to paper makers. With the development of an inexpensive source of paper, the amount of printed material grew exponentially. Yet the quality of paper made from wood pulp was not as fine or durable as that made of other plant fibers. The acid content of the wood, particularly coniferous species, and the acidic pulping (known as digesting) and bleaching processes of preparing wood pulp for papermaking proved harmful to the longevity of paper. Current environmental issues have brought about some interest in sulfur-free alkaline pulping; however, the superior pulp quality and relative economy make it unlikely that alkaline processing will replace the use of sulfates in pulp making.

Early mechanized papermaking processes involved beating wood chips with metal beaters which resulted in short fibers. Consequently, the paper produced could not stand up to the task of being handled over the years, as it was not durable. Chemical purification of the material to eliminate the lignin and the resinous binder from the wood fibers evolved in the mid-1800s. In a process known as the soda process wood chips were boiled in caustic alkali (sodium hydroxide and sodium sulfide) under high pressure. A commercially viable form of the acid or sulphite process, devised around 1880 in Austria, resulted in red fibers which needed to be bleached. Adding lime to the acid mixture negated the need for bleaching. The sulfite process satisfied the marketplace because of its high yield, the low cost of chemicals, the brightness of the unbleached pulps and the easy bleachability of the pulps with relatively simple bleaching agents. The result led to innovations that produce the bright white copy and printer paper we use today.

With the advent of computers in the home and workplace we anticipated a reduction in the usage of paper starting in the 1980s. But the tsunami keeps rushing onward as copiers and printers have made reproduction easier. Modern records managers and information governance professionals have a monumental challenge as our Boomer colleagues retire and leave a legacy of paper behind. As we have done in our careers, this, too, we will manage.

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2. Staple refers to the length and fineness of the plant fiber. Long-staple fibers are stronger than short-staple fibers.
4. Lignin is that component of plants that rejects water and tends to decrease fiber-to-fiber bonding in paper.
By Andrew Ysasi, MS, CRM, CIPM, CIPP, FIP, PMP, IGP

My new role as the Regent for the Exam Development Committee has been fantastic! First, my predecessor Sharon LaPlant did an excellent job of preparing me for the position, and setting me up for success with a wonderful new database to manage our exam questions. Second, the test writers on the committee are some of the most talented and smartest people with whom I have worked; they certainly make my job easier. Some of the new initiatives we are implementing during my term are:

• roll out new lead positions to aid with the oversight of Parts 1-5 and Part 6,
• assist the marketing and professional development committee (PDC) by updating content for the CRA/CRM workshop presentations for Parts 1-6 annually,
• retool the process for selecting questions to upload to Pearson Vue,
• update the Part 4 and Part 5 outlines.

The list isn’t everything but it gives you a glimpse into some of the initiatives we are tackling during my term.

Kind regards,
Andrew Ysasi, MS, CRM, CIPM, CIPP, FIP, PMP, IGP

By Nicholas De Laurentis, CRM, IGP

I am pleased to be returning to the role of Regent, Applicant and Member Relations for a second term. In this role I am responsible for processing eligible applicants as candidates, all activities related to the administration of the Certification Maintenance Program, and membership management.

Last year at the ARMA Conference, the ICRM unveiled our newest certification, the Certified Records Analyst (CRA). Candidates passing Parts 2, 3, & 4 of the ICRM Exams can now claim this new certification by joining the Institute as a member and adhering to the Certification Maintenance Program (CMP). The CRA is designed as a way to recognize those with solid RIM experience and commitment – the core. An added benefit to the CRA certification is that members will now have an unlimited timeline to complete Parts 1, 5, and 6 should they wish to advance themselves to the Certified Records Manager (CRM) certification.

There are a lot of tremendous advancements coming out of the Institute in our offerings and I plan to actively assist in our growth as an organization. During my second term I will be advancing the awareness of our existing certification offerings and maturing the processes for our membership. We will be forming a new committee focused on the engagement of our members and potential members, specifically contacts made at our many events and partner events. I encourage our members to be on the lookout for our call for volunteers and will be looking to work closely with those qualified individuals interested in advancing our professional relationships. Finally, I will be focused on improving our member experience through the website as it relates to applicant and member functions such as applying for the exams, our CMP program, and other member services.

I am grateful to be entrusted by our membership with this role and responsibility and am excited about this term.
Luciana Duranti is an affiliate professor at the University of Washington in Seattle, WA, and Chair of Archival Studies. Her areas of expertise include the analysis of work for the design of information systems and services. This is Part III of the series, summarized from Dr. Duranti’s research.

Keepers of records in the fifteenth through the eighteenth centuries encountered a new paradigm: the actions of sovereigns were indisputable and the political interests of the government were to be kept hidden from public view. From this archetype rose the Royal chanceries, the chancellor. Large bureaucracies developed during this time and European states monitored the activities of its citizens very closely, thus the privacy of records. Municipalities preserved local administrative functions and record keeping. Various states established public records repositories where all originals were to be filed, classified and indexed. The purpose of this collection of records was to keep track of properties owned by the states’ population. As society grew bureaucratic structures developed to regulate the activities of institutions such as banks, hospitals, markets, universities. Being accountable to the monarchy, these new institutions were required to adopt the records keeping methodologies utilized by the government.

Eventually, jurists across Europe became interested in the theory of records keeping. This resulted in a body literature on the creation, filing, retrieval and care of records and was used as a guide to advocate consistency in records creation and management. Baldassare Bonifacio in Venice wrote the first treatise on the subject in 1632.

He wrote, “There is nothing more useful for instructing and teaching men, nothing more necessary for clearing up and illustrating obscure matters, nothing more necessary for conserving patrimonies and thrones, all things public and private, than a well constituted store of . . . document and records. . . .” The importance of this literature illustrates the idea that records management was seen as an intellectual function and required the support of a systematic body of theory.

The National Archives in France was created in 1790 after the French Revolution in an effort to preserve that nation’s history. In 1794, the French Convention proclaimed the contents of the archive to be public property. It should be noted that active departmental records were not open to inspection at this time, only records prior to the Revolution. Thus a precedent was created that established a distinction between active records and inactive (archives) records that is still in use today in Europe. The act of transferring active records to the archival repository caused some confusion at the time as archivists struggled to apply classifications based on active records. Respect des fond was adopted to manage the inactive records according to their original organization (fond) which allowed archivists to more correctly catalog the contents and easy retrieval. The Napoleonic administration instituted a classification system identifying the class and subclass by a means of symbols comprised of letters and numbers. It was linked to the registry system creating a sophisticated control mechanism. Retention schedules were hit and miss at this time, some governments created destruction schedules while others transferred their complete holdings to the archives.

ATTENTION CRMs

Certification Maintenance Cycle: Remember, in order to maintain the CRM designation, you must earn 100 credits 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.
Surviving the Ascent to EIM Maturity

There are companies out there for whom Engineering Information Management is a critical component of a well-oiled machine, then there’s the rest – the majority. It seems like an uphill struggle - an uphill struggle while carrying 12 rolls of construction documents while being pushed and prodded at every step by Engineers who want version something of the drawing Frank did last Tuesday… or was it Tom on Friday. Never mind, you know which drawing it is right? The one with the big building on it.

As the volume of content grows, that hill becomes a mountain and the ascent requires not just determination but the right tools and support from the right people along the path. Why bother though? What’s the goal you’re trying to reach at the top?

We like to call that distant goal at the summit ‘EIM Maturity’. It might sound like a euphemism for an aging workforce but is simply the idea that you are already passionate about – achieving excellence in information management. This doesn’t mean achieving perfection – as much of a panacea as this may sound, it’s generally unrealistic and, most importantly in today’s world, simply too expensive. It’s about identifying what is important to you as an organization. If 90% documented in the right areas is good for you then this is about the journey to get there – whatever your number is.

There are seven summits that must be surmounted on the journey to EIM maturity. With a bit of luck – and several billion years of geology – this happens to coincide with the fact that the world’s seven highest mountains form the Seven Summits mountaineering challenge. Each of our seven challenges to EIM Maturity correspond to one of the seven mountains, a nice little analogy allowing us to add some pretty mountain photos to presentations. These challenges can be captured in seven words, Organization, Control, Process, System, External, Compliance and Strategy.

Before mapping out the route to the top of each summit it is important to first identify from where we are starting? How much of the climb still lies ahead? Then we can start to plan what we need to get us there. You can’t reach the summit in one simple step – this is a journey and without making it in manageable sections you're doomed to fail. If you’re sitting at base camp in Everest with a Canada Goose jacket, a woolly hat and a sturdy pair of boots you got on sale from Walmart and plan on reaching the summit today then sorry, I’m not holding your hand on the climb. I’ll take your photo and tag you on Twitter as you disappear into the clouds though so at least there’s a lasting record of your attempt.

Every climber needs the right tools, for the right summit and the right conditions to succeed and in this analogy your organization is the climber and the tools are the software and processes. We know it can be a scary journey ahead but just as it’s important that you ask the mountaineering expert for advice the same applies to reaching EIM Maturity. You don’t need to do it alone. Share your experiences and your plans, warn others of the dangers ahead on particular routes and when you yourself stumble and fall – don’t be afraid to admit that your original plan wasn’t quite right. It’s not dangerous to stumble on the ascent, but it is dangerous to keep stumbling and ignore the warning signs without learning from what you’ve experienced so far.

Kinsmen Group is from the other side of the fence from the normal ProfessioNotes audience. We are experts in providing Engineering Information Management solutions and consultancy. Further information from our Seven Summits to EIM Maturity can be found on our website www.kinsmengroup.com.

DID YOU KNOW THE ICRM NOW HAS A WIKIPEDIA PAGE?

Yes, we share the acronym with the likes of the International Cliff Richard Movement. After several unsuccessful attempts to create the page in early 2016, someone out there has managed to make it happen. Who this person is, we don’t know, but we would like for you to stand up and be recognized.

I have made some updates to the site now that it is up and running, but there is a lot of ICRM history to be told. I would appreciate your input. For those of you who have the knowledge of our history, we would appreciate some assistance in adding to our page. If you have the technical knowledge or are willing to learn on your own, Wikipedia is pretty simple to update. For those who are not so technically inclined, I welcome you to send me your stories, the knowledge you know about how the ICRM came to be. I will be happy to format the content and add it to the page. As I get time, I will be researching our records to pull some of this history together; I know there is a collective out there that can help build this easier and faster.


Sincerely,
Brice Sample, CRM
ICRM Chairman of the Board
Typical appeals:
- Decertification
- Unable to complete CMPs within the required time frame
- Failing Part 6 by less than eight points (63%–69%)

How do I appeal?
Appeals must be made in writing (email is preferred) and submitted to legislation-appeals@icrm.org. Appeal deadlines vary by cycle and are provided in the exam results notification.

Complaints and special requests should be addressed to the relevant Regent for assistance. For example, testing environment complaints are handled by the Regent, Exam Administration and Grading. If the issue is unresolved, then an appeal may be submitted to the RLA. Keep in mind that although the Regent may forward the issue to the RLA for awareness, it isn’t an appeal until it is submit directly to the RLA indicating intent to appeal.

All appeals are processed by the Appeals Committee within 30 days following receipt of the appeal by the Committee. Decisions of the Appeals Committee are final. The Appeals Committee does not provide feedback on appeals.

Lessons Learned:
From my experience as the RLA, many of the decertification appeals can be avoided if the member insures that their contact information is up-to-date with the ICRM. The ICRM makes several attempts to contact members prior to decertifying. The only information it has is what is provided by the member. It may not be on the top of your list when you change or lose a job, have health issue, move, family crisis, etc. but it is very important to make sure your information is up to date with the ICRM.

The Appeals Committee, and I as RLA, strive to keep an open mind when reviewing all appeals and work diligently to apply logic, governance, and compassion to each and every appeal we review. It is our aim to ensure balance and fairness in every situation.

It has been very enlightening, rewarding and a privilege to serve as the ICRM Regent, Legislation and Appeals.

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.
This issue’s Member in the Spotlight is Deborah H. Armentrout, CRM, IGP. Deborah was born in Pennsylvania and now resides in Maryland where she is the Director of Corporate Records Management at the National Archives and Records Administration.

While in school Deborah studied Art Studio and Communications. After graduating from Indiana University of Pennsylvania she writes, “I got a job in the records department at a labor union. They hired me because I had a 4-year degree. I had worked in an office before and was doing components of records management, but didn’t realize that there was an actual name for what I was doing.”

As far as who inspired and mentored her, Deborah claims, “There are so many people who have provided advice and inspired me through the years that I wouldn’t want to list them and forget someone. They probably know who they are.” During her career she notes that she has worked in records management “...including that time that I didn’t realize that I was doing ‘records management.’”

Like many others who have succeeded in obtaining the CRM accreditation, Deborah writes, “When I first started down the CRM road I didn’t have a mentor. I navigated through Parts 1-5 on my own. I wish that I had a mentor during that time as they might have recommended that I take all five exams at the same time. I am not sure why I didn’t do that because studying for one was really studying for all, due to the overlap of content. I also didn’t pass Part One the first time and knew that I wasn’t going to pass after the first few questions. To pass the next time, I found a business management book at the library. I think that if I had a mentor during that time, they would have provided me some tips such as looking at where I had a gap in my knowledge and studying for that particular area, such as the theory of business.” She reached out and found Anna Nusbaum who mentored her for Part Six.

During her career Deborah confides that she has looked for opportunities along the way to enhance her skills and marketability. She writes, “I don’t have one of those interesting stories like finding a snake or shoes in file boxes. I left a position because the organization was not moving towards electronic recordkeeping. My next job wasn’t just scanning – which was a big deal at the time – but also involved one of the first document management systems. That experience served to be a catalyst for my career.

“My career has been from real word experience and not just theory. I have worked my way up from organizing a file room, coding mail with file topics, working on one of the first document management systems, setting up a digitization program, appraising records, training Federal employees, serving as the Records Officer at the Nuclear Regulatory Commission, and being the Director of Corporate Records Management at NARA.

“I am a strong believer in networking and learning from others. I was an ARMA member for about a year before I attended a meeting. I had left an organization after being offered a fair sum of money for anyone who had worked there for more than three years. Fortunately, at the first ARMA meeting that I attended, I sat beside someone who had attended the same college. By the following Monday, I was working at that person’s organization. Ever since then, I have been dedicated to professional organizations and have served on the ARMA Metro Maryland Chapter board for many years. I am also on several advisory and planning committees for various records and information management organizations. Most recently, I joined the ICRM Strategic Alliance Committee and am honored to be more involved with the ICRM.”

Disclaimer: The statements and views expressed by the subject of this article are her own and do not necessarily reflect those of the United States Government.
New CRMs
New CRMs from the February Testing Cycle

Jan Foster-Penn
McKinney, TX

Jami Guthrie
Rapid City, SD

Jeremy Haiar
Locust Grove, GA

Rolland Hogue
Bartow, FL

Lacey Imbert
Fort Worth, TX

Olaf Krop
San Francisco, CA

Nathaneal Pauley
Schaumburg, IL

Brian Quinn
Indianapolis, IN

Larry Reitz
New Market, MD

Marshall Rinek
Edina, MN

Edward D. Sumcad
Norwalk, CA

Kevin Vagen
Quincy, MA

Ruben D. Vargas
Maricopa, AZ

Josiah A. Wilkinson
Grove City, OH

Natalie Windle
Elma, WA

New CRAs
as of May 1, 2017

Jennifer Anderson
Rahway, NJ

Chris Austin
Minneapolis, MN

Sandra Bates
Regina, SK

Bradlee W. Davis
Cary, NC

Wendy Gibson
Seattle, WA

Jessie Graham
Montpelier, VA

Philip Guenther
Charlotte, NC

Samuel E Haiduc III
Navarre, OH

Laren Hellen
Upton, NY

Amity Highley
Edgewood, WA

Kyle Hjelmstad
Rosemount, MN

Katherine Huit
Mcminnville, OR

Leroy H. Jack, III
Newnan, GA

Laura A. Kurtycz
Grand Rapids, MI

Michael Lee
DeSoto, TX

Anika McCoy
Longview, WA

Lisa Pottle
Fort Mcmurray, AB

Douglas W Stewart
Citrus Heights, CA

Jessica Tanner
Bartlesville, OK

Yvonne Wathen
Louisville, KY
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.

For more information about becoming a Certified Records Manager, contact (518) 694-5362 or visit www.icrm.org