Dear Fellow Members of ICRM,

The many ICRM volunteers who contribute to the advancement of our profession have been very busy. I have lots of news. We’ve been out representing ICRM and connecting with CRMs & CRAs along with those interested in certification at multiple partnership events. This summer an ICRM Board member attended every one of the ARMA Regional Leadership Conferences in order to represent ICRM and engage with ARMA Chapter and Regional leaders. It was very good to re-connect. We’ve also continued to engage the larger profession by providing presentations, manning booths, and conducting exam preparation sessions at more partnership events. For August, this includes NIRMA, NAGARA, ZRA, and 930Gov.

The response to our new logo has been very positive but, there have been some critical comments. One issue was the matter of new logo pins just sent to newly certified CRAs and CRMs but, sold to members we encountered at a partnership event. Some thought we were being overly frugal with your dues and the Board listened. We voted to send out a new logo pin to each active member. Bulk procurement is underway and these will be coming soon.

The Board just approved changes to the process for updating the ICRM Examination Preparation Product. This set of materials is an important means for preparing potential applicants and candidates for our certification exams. It’s refreshed annually after our Examination Development Committee meets to update the test bank and then refined in time to be presented at the ARMA Live Designation Academy in the fall. It is then made available January 1st for Chapters to purchase for use at local seminars or educational events. For years we all depended on CRM Kiersten Ward to do annual updates and revisions, largely single handedly. The slide decks for the ICRM overview and Parts 1-6 became the source for a core of other presentations used at conferences and events. We amended the process, obtained support of a graphic artist from Capitol Hill Management Services, created an Examination Preparation Committee (EPC) and implemented a defined timetable for annual revisions. We’ve also added focused examination preparation material for post-certification specialty designations of Nuclear Specialist (CRM Margie Janney as lead) and Federal Specialist (CRM Cheryl

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ICRM Leadership Roster

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ICRM EXAMINATION DEVELOPMENT COMMITTEE UPDATE

Caroline J. Walters, CRM – ICRM Regent, Examination Development

Examination Development Committee (EDC) Transformation:

Did you ever wonder how the exams for the CRM were written? Have you served on the Examination Development Committee before? Would you like to help develop the exams for the ICRM?

The Examination Development Committee (EDC) currently consists of a writer for each part (1-5) along with three writers for Part 6. Our job is to research and write new questions, update the outlines, update the pre-conference/preparation product that the ICRM and ARMA Chapters use to do exam preparation courses, and maintain the bibliography.

That’s a lot of work for a small group of people, so in 2018 the ICRM Board approved a transformation of the EDC to lessen the load for the current committee and to develop examination writing skills within a larger group of CRMs to support the examination development process and “grow the bench.”

Parts 1 -5 will include the following positions:

1. **Lead Writer:** This will be the position that is currently filled. This position will be responsible for leading their small group of assistant writers in researching, writing, and reviewing questions for a specific Part (1-5) of the CRM examination. The Lead Writer will attend the annual EDC meeting every spring. Lead Writers will receive CMPs based upon their participation and attendance at the EDC meeting.

2. **Assistant Writers:** There will be up to three assistant writers for each Part. Assistant writers will not attend the annual EDC meeting, unless the Lead Writer is unable to attend, but will support with questions development, review of the questions for the part, and write new questions for EDC approval. Assistant writers will receive CMPs based upon their participation and the recommendation of the Lead Writer.

Part 6:

1. **Case Study Writer:** These are the three case study writers (currently filled) who research, develop, and finalize the case studies for the Part 6 examination. All three members attend the EDC meeting and collaborate on the topics and templates for the Part 6 case studies. Case Study Writers receive CMPs based upon their participation and attendance at the EDC meeting.

2. **Case Study Submitter:** This is any CRM who wants to take a stab at writing at Part 6 case study. Do you have an interesting RIM story to tell? Submitters will write a complete case study and receive up to five CMPs for their submission. Submitters will not be told if their case study is used and the EDC Part 6 writers may revise, rewrite, or reject any question to use as a Part 6 case study.

3. **Case Study Proofreaders:** These individuals are assigned to a case study writer and will review their completed cases for grammar and spelling, and inform the writer of any issues with the question. They do not rewrite/edit questions, but provide the important final step of finalizing questions. Proofreaders receive CMPs based upon the number of cases they review each year.

Currently we need volunteers (CRMs only – sorry CRAs) to fill the assistant writer positions and provide information to those who are interested in submitting Part 6 case studies. If you are interested in any of these positions, please contact me at cjwalters@virginia.edu.

The EDC is a core function of the ICRM and with our profession changing so quickly, we need everyone’s help to keep the exams as current. With the addition of assistant writers and case study submitters we hope to lessen the load on our hard working writers and also expand our ability to maintain and increase the standards of our profession.
Howard Loos, CRM, IGP - ICRM Mentor Coordinator

Hello ICRM candidates,

Are you taking Parts 1-5?
A study guide is available to help candidates with Parts 1-5. The study guide contains a short list of recommended reading materials and encourages candidates to use the outline available on the ICRM website. Please email me at mentor@icrm.org to obtain a study guide.

Are you taking Part 6?  If you are ready to take the Part 6 exam, having a mentor is a must. If you are unable to find a Part 6 mentor from your local ARMA Chapter, please reach out to the ICRM Mentor Coordinator at mentor@icrm.org to request a mentor. After the assignment has been made, you will receive a packet of prep materials along with a study guide and four recently retired practice exams.

To all Mentors and those who would like to be a Mentor

If you are serving as a Part 6 mentor, please notify the mentor coordinator in order for CMP credits to be approved for your mentoring activity. Mentors are eligible to receive up to three CMP credits for each candidate during an exam cycle, as long as feedback from at least one submitted exam is provided to the candidate.

For those who would like to serve as a mentor, please send an email to mentor@icrm.org expressing your desire to serve. We can always use the help. Here are a few Q/A's to help you understand the role of a mentor:

What is 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 of time.
• The main duties of the mentor are first, to answer questions related to the examination process and second, to provide feedback on one or two practice exams completed by the candidate. Most communication is done via email.

What resources are available to help mentors?
• 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 the practice exams.
• Part 6 Study Guide – This study guide is designed to give 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/. 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.

ICRM Newsletter Deadlines

Deadlines for submitting articles for the ICRM newsletter are November 1, February 1, May 1 and August 1. Please email your news items to: newslettereditor@icrm.org. All items must be in MS Word or MS Excel format. Photographs may be in .jpg or .tif format.

ATTENTION CRM's & CRAs

Certification Maintenance Cycle: Remember, in order to maintain your 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.
Member in the Spotlight

This issue’s Member in the Spotlight is Theresa Gamble, CRM. Theresa was born in Boston, Massachusetts and raised in Erie, Pennsylvania where she currently lives and works. In her current position, Theresa is the Director of Corporate Compliance at Erie Insurance within the law division. She has oversight of the company’s records management program including its retention schedule, litigation holds, and discovery support. Theresa was the company’s first corporate archivist, maturing the archives function and organizing its collections now exhibited in the Heritage Center, a historic building on the company’s campus.

Theresa has worked on many technology initiatives throughout her career. These have included introducing e-mail archiving and discovery tools along with spearheading data migration processes. She is now working towards the creation of a comprehensive remediation plan for unstructured data and documents, along with developing an integrated archival solution for structured data.

Her day to day activities vary from responding to inquiries, meeting with her team, and taking part in company-wide initiatives. As Theresa says, “The work is a good mix of tactical tasks and strategic problem solving and I like that about it.” The right e-mail management tool and she characterizes her career as “progressive, interesting, and rewarding.” Recently, her favorite project has been searching.

Theresa remains a life-long learner. She has a Master’s Degree in Archival and Museum Studies from Duquesne University in Pittsburgh, Pennsylvania. She is also a Certified Records Manager (CRM) and a Certified Compliance and Ethics Professional (CCEP). She holds an Associate in Insurance Services from the Insurance Institutes, and has completed their Leadership Development Program. She also received the Market Conduct Management Certificate from the Insurance Regulatory Examiners Society.

Theresa’s path to her CRM certification was a bit of a challenge. She did not have problems studying for or passing the actual exams; her problem was the travel.

Testing wasn’t offered in her home city of Erie at the time. She had to travel to Buffalo, New York, which is about 90 minutes away from where the closest test-taking center was.

Theresa has had mentors in records management that really helped her along the way. One is author and speaker Dr. Mark Langemo who assisted her with creating a productive Records Retention Committee and another is Bennett B. Borden, a chief data scientist at Drinker, Biddle, and Reath, who has been a sounding board for e-discovery initiatives.

Records management is ‘all in the family’ for Theresa. Her younger brother, Ken Gamble, Esq. is the Clerk of Records for Erie County, PA. He inspires his sister as he feels strongly enough about his work to keep running for election to keep his full-time position. Theresa hopes that others continue to follow in her and her brother’s paths to experience such interesting careers in the field of records and information management.
LIU Post Palmer School, Institute of Certified Records Managers Partner to Provide Graduates with a More Immediate Path to Certification

PRESS RELEASE
BROOKVILLE, NY—The LIU Post Palmer School of Library and Information Science and the Institute of Certified Records Managers (ICRM) announce a strategic partnership to allow master’s and post-masters graduates of the LIU Post Certificate of Advanced Study in Archives and Records Management, who have completed their coursework (online, in-classroom, or both), and meet established qualifications for ICRM candidacy, to apply for credit for Parts 2-4 of the ICRM exams.

The primary benefit of the partnership is that it leverages the RIM-focused content of the certificate program to facilitate graduates becoming Certified Records Analysts (CRAs). The terms of the new partnership will also be extended to 2016-2017 graduates as well. According to Dr. Gregory Hunter, Professor and Director of the Certificate of Advanced Study in Archives and Records Management, “ICRM’s partnership with the Palmer School is a recognition of the quality of our certificate program, which has been educating RIM professionals locally and nationally for three decades.”

Rae Lynn Haliday, Chairman, ICRM Strategic Alliance Committee states, “the ICRM is honored to have academic institutions the caliber of Long Island University willing to partner to advance the Records and Information Management (RIM) profession and facilitate their graduate’s professional development.” This partnership meets the organization’s joint strategic goals of enhancing the overall RIM profession by supplying educated and credentialed professionals to fill demand for jobs and to advance related careers.

Graduates of the program are required to submit their transcripts at the time of application to the Institute. As part of the partnership agreement, graduates of the LIU Post Advanced Study in Archives and Records Management must meet additional qualifications by providing proof of one year of work experience or alternately by having completing a RIM-focused internship, externship or independent study entitled to at least 3 graduate hours under the oversight of a faculty member who is a CRM in good standing.

Instructors of the Certificate of Advanced Study in Archives and Records Management are required to be Certified Records Managers (CRMs) as a condition of the partnership.

The collaboration provides a further benefit by streamlining the certification maintenance requirements in order for existing CRMs and CRAs to receive credit for the courses they take in above-noted certificate program through the pre-approval process.

“ICRM certification is a credential of distinction signifying both knowledge and experience, backed up by an obligation to continue professional development and abide by a code of ethics to maintain that certification. One distinction between a true profession and a vocation is a distinct body of knowledge represented by academic programs of universities. It is exciting to partner with LIU, an accredited university program, who will provide candidates with an in-depth education covering the ICRM body of knowledge required to qualify as a Certified Records Analyst,” said John Krysa, ICRM President.

The Long Island University prepares individuals for careers as information professionals. Graduates of the LIU Post Certificate of Advanced Study in Archives and Records Management work in diverse areas of the information profession and now have the opportunity to obtain the Certified Records Analyst (CRA) upon completion of this program.

Founded in 1975, the Institute of Certified Records Managers (ICRM) is an international certifying organization of and for professional records managers. The Institute confers four designations: the Certified Records Analyst (CRA); Certified Records Manager (CRM) and two Post Certification Specialty Designations including the Certified Records Manager/Nuclear Specialist (CRA/CRM/NS) and the CRM/Federal Specialist.
LIU Post Palmer School (continued)

To learn more, contact the ICRM or LIU Post:
ICRM Contact Information:
ICRM Administrator
Institute of Certified Records Managers (ICRM)
Work: (877) 244-3128
Website: http://www.icrm.org
admin@icrm.org

LIU Post Contact Information:
Gregory S. Hunter, Ph.D., CA, CRM, FSAA
Professor
Director, Ph.D in Information Studies
Director, Certificate of Advanced Email:
Study in Archives and Records Management
Palmer School of Library and Information Science (LIU Post)
(516) 299-2171
ghunter@liu.edu

President’s Message (continued)

Smith as lead) and these premiered at a session of the NIRMA conference. Thank you to the CRMs who responded to the call for volunteers. The Board approved my appointment of CRM Lucy Rieger as the EPC Chair, with members CRM Melissa Dederer, CRM Meg Lell, and CRM Sofia O. Scalzitti.

Many of you have probably heard that we’ve been looking at ways to make access to our certification exams more convenient. One initiative we have been working on is to change from offering exam Parts 1-5 just once each quarter and open it up to year-round testing. We think it’s possible and we’re close to making an announcement. Post-certification specialty designation exams for CRM/Federal Specialist and CRA-CRM/Nuclear Specialist would also be available year-round. As Part 6 case studies require CRMs who volunteer as graders to schedule their time too, these exams will remain on a fixed schedule.

We are looking forward to seeing many of you at the ARMA Live Conference in Anaheim CA. We’ll have our ICRM business meeting at 6 p.m. on Sunday, October 21st and update you on our accomplishments and what the Board has been working on, followed by the ICRM reception at 7 p.m.
Karen S. Knight, CCEP

Like most organization-wide pursuits, advancing to information governance (IG) from records and information management (RIM) is no simple task. The complexity of this undertaking is informed by just a few of many reasonable questions:

- What, specifically, does IG advancement mean for my organization?
- What should be a priority?
- What can be leveraged, and what will need to be enhanced or replaced?
- Can I advance IG in my organization, in phases, over time?
- Where and how do I begin?

Despite these newest uncertainties, your organization’s RIM to IG advancement is making progress when: (a) the characteristics that comprise your organization’s culture are better understood, (b) an engaged Tone at the Top is unambiguously supportive of IG, and (c) a few of your organization’s information-centric disciplines have unified around information as an asset.

Now, comes your IG advancement plan – and, let’s be clear. This is NOT the same as your project plan. That was part of the business case that first enabled your RIM to IG pursuit. Instead, this plan will detail the tactics your organization will employ to advance to IG.

CURRENT STATE ASSESSMENT

Without knowing the extent to which your organization’s current recordkeeping practices align with or deviate from the elements that comprise a contemporary IG program, it’s difficult to develop an IG advancement plan.

Your RIM to IG journey requires a map derived from comparing your organization’s existing recordkeeping practices to the principles and standards employed by IG practitioners and recognized by IG authorities.

It’s really hard to get somewhere without YOU ARE HERE guidance!

From this current vs. desired state assessment of your organization’s IG maturity will come your IG advancement plan. This and its roadmap will outline the means, methods and time frames you’ll need to mitigate the information-related threats, risks or gaps challenging your organization.

Assessment Criteria

Defining the elements of effective, efficient, and defensible IG is the first step in conducting a maturity assessment. These elements - sound industry practices - form the baseline against which the current state of your organization’s recordkeeping will be reviewed.

Multiple standards organizations (The Sedona Conference®, ISO, ARMA International®) and various government entities have detailed these elements within guidances and as regulations, respectively. These wide-ranging elements are represented by, and can be assessed within three categories:

**Organizational Commitment**

- Leadership engagement
- Staffing and resources
- Accountability
- Training
- Compliance / audit
- Continuous improvement

**Information Lifecycle Management**

- IG Program authorization
- Information value
- Information creation and receipt
- Retention
- Storage, access and use
- Preservation
- Disposition / deletion / destruction

**Interdisciplinary Alignment**

Finally, aligning information-centric disciplines in your organization within an IG framework facilitates much-needed collaboration. These disciplines could include Privacy, Information Security, Legal Holds, Contract Administration and Records Management. An organization-wide, cohesive approach to recordkeeping supports both the optimization of information value, and the effective management of your organization’s information-related exposures.
Your IG advancement plan will conclude with an assessment of the maturity of the following recordkeeping practices in your organization:

- Information protection
- Historical archiving

**Assessment Methodology**

Stated earlier, IG advancement is no simple task. You have asked, where do I begin? You now know. You understand the analyses that must occur. You know the level of detail required. So - how can this massive amount of data be collected? Use interviews!

It is recommended that an independent third-party - an expert in the recordkeeping discipline, be engaged to conduct the interviews. Independence mitigates potential internal concerns of bias. Expertise assures nothing is overlooked. The information collected will form the foundation for your organization’s IG advancement plan; accordingly, the quality and comprehensiveness of the interview process is critical.

**Even better, interviews equal stakeholder engagement!**

**Rapport enables robust sharing and data collection.**

Through the interview process, information stakeholders become owners of the advancement plan. Stakeholder involvement builds rapport, facilitating an IG program that is real and usable. This involvement also inspires interviewees to do what is right as they manage their organization’s information assets and, this inspiration can be contagious.

**Assessment Matrix**

The maturity assessment matrix conveys the interview findings. Its content will transform your newest IG advancement uncertainties into confidence and conviction.

It’s your IG advancement plan!

As detailed, the assessment uses three criteria categories to classify and organize contemporary recordkeeping attributes. These attributes represent the benchmarks against which your organization’s current state recordkeeping practices are measured. Attribute by attribute, the matrix will itemize:

The interview findings are an accounting of your organization’s current recordkeeping and other information-related practices.

The comparisons are the opportunities that will advance your organization’s existing RIM practices to an IG platform, specifying what can be leveraged, what must be enhanced and what must be replaced.

The rankings reflect the collective - yet subjective - weighting of the business need, and the reputational, compliance, and financial impact of each opportunity.

These rankings will translate into your organization’s IG advancement implementation roadmap, identifying priorities and suggesting advancement phases.

The roadmap then details a multi-year timeline with risk vs. benefit implementation sequencing.

Assess and analyze your organization’s current state. Determine the existence of IG program attributes - the current level of IG maturity in your organization. Rank the degree to which each attribute is engrained in business-as-usual operations, and the opportunities for enhancement.

With this IG advancement plan, you’re ready to go!

**References:**

Advancing from RIM to IG – Beyond your Project Plan

Chapter I – The Culture Dynamic
Chapter II – Tone at the Top
Cohasset Associates | ARMA International 2016 | 2017 Information Governance Benchmarking Survey
White Paper: Transforming Information Management
Chapter III – Interdisciplinary Imperatives
Coming Next: Chapter V – Metrics Matter

Karen S. Knight, CCEP, Principal Consultant
Cohasset Associates, August 2018

About Karen S. Knight, CCEP

Ms. Knight is a Principal Consultant with Cohasset Associates. Her experience as a Chief Compliance Officer for over 20 years informs her consulting engagements. Ms. Knight’s design of compliant and sustainable Information Governance Programs includes governance policies and standards, legal hold processes, retention schedules, training and education, and technology enablers. Mitigating the regulatory and legal risks of governing information, Ms. Knight integrates and aligns records management and information governance disciplines, addressing privacy, information security, ethics and compliance, contract and procurement, and data breach prevention. She is a white paper author and frequent speaker and workshop leader on these and many other information-related topics. Ms. Knight can be reached at karen.knight@cohasset.com.
New CRAs
as of May 2018
Charles Stech
Chaska, MN
Aimee Bader
Grand Forks, ND
André Morrell
Fort Lauderdale, FL
Carol Hayden
Houston, TX
Chatham Fralix
Kildosher
Raleigh, NC
Christina Irving
Sonora, CA
Claudia Shedden
Dawkins
Balch Springs, TX
Damian Brum
Missouri City, TX
Deborah
Papadopoulos
Centreville, VA
Dominic Zuccher
Downers Grove, IL
Donna Faler
Baton Rouge, LA
Melanie Maxwell
Smyrna, GA
Missy Baird
Oliver Springs, TN
Nichelle Cunningham
San Antonio, TX
Peter Vanderhoof
Park City, UT
Ramon Carl
Cruickshank
Trinidad And Tobago
Raymond Kelley
Lakewood, CO
Rose Marie Kimbell
Saint Marys, GA
Roxanne Carriere
Wabamun, AB
Suzanna S. Carter
Giddings, TX
Connie D Redic
Camano Island, WA
Kelsey Seip
Waggenspack
Baton Rouge, LA

New CRMs
as of May 2018
Keith Adams
Washington, DC
Ben Lutkoski
Durham, NC
Gordon E. Brown
Atlanta, GA
Karen J. Langley
Athabasca, AB
Kathleen R. M. Brow
Abbotsford, BC
Katie Oubre
Springfield, IL
Kimberly Wendelin
Denver, CO
L’Cena Parsons
Trenton, TX
Nick Hartley
Pittsburgh, PA
Rochelle Kay Waldoch
Roseville, MN
Sernell Benjamin
Beltsville, MD

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

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

In a business world in which new jobs are increasingly competitive, your designation as a Certified Records Manager or Certified Records Analyst shows that you have the experience and expertise that others may lack, and skills to show that you are a leader in the RM profession.

For more information about becoming a Certified Records Manager or Certified Records Analyst contact (518) 463-8644 or visit www.icrm.org