

2015 SUMMER

**WHAT'S INSIDE....**

ICRM Leadership Roster .....Page 2

ICRM's 40th Anniversary ... Page 3-5

Member in Spotlight:  
 Peter Kurilecz, CRM .....Page 7

Five Tips to Organize &  
 Tidy Your Office ..... Page 8-9

Welcome New CRMs! .....Page 9

ICRM Electronic Testing ..... Page 10

The Candidate Coach:  
 Part 6 Mentoring..... Page 11

Alan Andolsen Award  
 Nomination Form ..... Page 12

CMP Pre-Approved  
 Activities .....Page 13-14

The ICRM Hadbook --  
 Rest in Peace ..... Page 14

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**FROM THE PRESIDENT...**

As I write this Message to the ICRM membership it is hard to believe how much your Board of Regents has accomplished already this year. Honestly, it is difficult to choose where to start. However, I will begin by thanking Linda Buss, MA, CRM, for writing such an eloquent, empowering article on the Institute's 40<sup>th</sup> Anniversary. She was the first person I thought of when the Board discussed how we could best tell our story in celebration of this significant milestone in ICRM history. You will no doubt enjoy the article and probably have an even greater appreciation for the ICRM and its value to you as an individual and to the foundation of the RIM profession.

The Exam Development Committee has been very busy this year and as a result they have an article in this issue dedicated to covering several key enhancements and improvements to the exam development process.

Teri Mark, CRM, ICRM Treasurer, has been working with other Board members and Caphill, our management consultant, to streamline and improve the administration of the Exam Prep prod-

uct. We notified ARMA chapters that these changes were being made and provided them with specific contact information in the interim. These changes should result in an improved experience for ARMA chapters and industry-specific associations utilizing the Product to support professional development activities for their members.

The Board of Regents has been working to expand our current strategic alliances and to develop some amazing opportunities that have been collectively generated. We will keep the membership informed as specific initiatives come to fruition. Caphill is now managing the ICRM Facebook and Twitter accounts and will post related events and information.

I want to invite everyone to attend the 2015 ICRM Annual Reception and Business meeting in D.C. in October.

*(Continued on Page 6)*



**President Rae Lynn Haliday, CRM**

**UPCOMING EXAMINATION SCHEDULE**

<i>Fall 2015</i>	<i>Spring 2016</i>
Registration Open Aug. 21-Oct. 29	Registration Open Feb. 19-April 28
Exam Dates ..... Nov. 2-13	Exam Dates ..... May 2-13
<i>Winter 2016</i>	<i>Summer 2016</i>
Registration Open: Nov. 20-Jan. 28	Registration Open May 20-July 28
Exam Dates ..... Feb. 1-12	Exam Dates ..... August 1-12

# ICRM LEADERSHIP ROSTER

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# ICRM's 40TH ANNIVERSARY

By **Linda Buss, MA, CRM**  
*Newsletter Editor*

For many of us in records management it seems natural that there is an organization to ensure a standard by which professionals involved in records and information management could be accredited and recognized according to criteria of experience and capability established by our peers. We embrace the title Certified Records Manager and the effort it takes to attain those three letters behind our name. CRMs can hold their own against MLIS, Certified Archivists and other professionals knowing that we, too, have achieved a level of competence that commands respect. The principal motivation for certification was to establish a strong professional standing, raise the professional level, and to recognize that a person certified as a records manager had broad professional experience in the field. The ICRM is the official certifying body for ARMA International (Association of Records Managers and Administrators), and the Nuclear Information and Records Management Association.

We take this opportunity on the ICRM's 40<sup>th</sup> anniversary to recognize the pioneering men and women in our chosen field, acknowledge their vision, hard work and the obstacles they surmounted. And who were those worthies who looked at the current state of records management and decided it could be improved? Many of the names are familiar: Mary Robek, Gerald Brown, Donald Evans, Katharine Mutchler, L. Ruth Thomas, Stanley Gordon, Thornton

Mitchell, William Benedon, Charles Garrison, David Goodman, Dudley Judd, Mark Koenig, and William Rofes.

It all started when Gerald Brown wrote to William Southard on August 25, 1966, with a hypothetical question: why can't ARMA establish educational and experience standards that could be used to designate an individual as a certified records manager? In an excerpt from that momentous letter, Gerald asks, "If ARMA doesn't professionalize records management, the records manager will remain just another job title. Could not the (ARMA) Council . . . set down hard and fast educational and experience standards that could be used to award a 'CRM'?" He goes on to write, "Employers would come to recognize the short comings of simply promoting a man into a Records Manager, rather than recruiting a professional." Southard found merit in the suggestion and proposed to establish a separate professional certification within ARMA at the 1966 ARMA Region IV meeting.



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*Dudley F. Judd  
 Exxon Corp.*



*H. J. (Mark) Koenig  
 Management  
 Consultant*



*Katherine A. Mutchler  
 Lever Bros. Co.*



*Mary F. Robek  
 Eastern Michigan Uni.*

In those early years a handful of records managers from very diverse fields worked together to identify competencies, create a constitution and by-laws to govern the organization, and finally to develop an examination protocol. Correspondence and meeting minutes from the original participants clearly convey the decade-long struggle to bring recognition and stature to the records management profession. Initially, the certifying body for records managers was embedded



within ARMA. The Society of American Archivists, the National Micrographics Association (now the Association for Information and Image Management or AIIM) and the National Association of State Archivists and Records Administrators (now the National Association of Government Archives and Records Administrators or NAGARA) sponsored the fledgling certification program within ARMA.

Working closely with the ARMA National Board, the six members<sup>1</sup> who comprised the CRM exam committee presented their first draft which the 1969 ARMA National Board rejected as being too technical and asked that input from those in business be included. The second draft presented in 1971 was also rejected as being too theoretical and without enough practical application. Determined not to let two rejections result in the demise of the dreams and hard work of the fledgling certifying organization, the CRM exam committee regrouped. In the meantime, ARMA produced a brochure in 1972 announcing that a certification program by examination would be established. Field tests of the exams were performed in late 1973 and early 1974. ARMA had struggled with the certification process, experiencing some good outcomes and some not so good. The first examination was given in the fall of 1974, with disastrous results. None of the candidates taking the examination passed.

That same year, Gerald Brown, then ARMA President, proposed to separate ARMA and the certification process to eliminate "organizational politics." Through the ingenuity of Gerald Brown and Ben Oliver, President of AREA (Association of Records Executives and Administrators), an inspired vision emerged. The ARMA Board of Directors approved the separation of the CRM program from ARMA in October 1974. A joint venture of both organizations appointed an ICRM Board of Regents with each organization asked to provide \$2,500 to implement the CRM program. ARMA selected William Benedon, William Rofes, Mary Robek, Stanley Gordon and Thornton Mitchell; AREA appointed Mark Koenig, Ruth Thomas, PhD., S. Joe Pomrenze, Dudley Judd and Katherine Mutchler. These ten individuals represented the private sector, education, local government, state government and the federal government. They met for the first time on January 6, 1975, adopted a constitution and bylaws and on January 7, established standards for certification by review and by examination. ARMA approved the constitution and bylaws in February and the ICRM was incorporated in North Carolina later that year. The first examinations offered by the ICRM were scheduled twice a year, in May and November. Individuals who had previously passed the ARMA certifying exams were recognized

by the new ICRM.

In the early years standards were set high for those who wanted to grandfather into the certification (certification by review): a college degree and at least ten year of professional experience, a published article or a paper on a records management topic. Eighteen years of professional experience plus an article or paper was required if the applicant lacked a college degree. This applied to the original Board of Regents as well who had to submit their qualifications and pay the same fees. The idea that a candidate needed a published article to be grandfathered in was a contentious one and several submitted articles were rejected. What was finally decided upon was a requirement that the article be published in a peer-reviewed journal of which there were only two or three at the time. As one can imagine, this was difficult to fulfill and the Board revised the requirements. In 1985 the ICRM revised the qualifications criteria required to take the exams. In addition to a four-year degree from an accredited college "a candidate ... must have a minimum of three years full-time documented professional experience in records management prior to examination in three or more of the following categories: Management of Records Management Programs, records creation and use; active records systems; inactive records systems; records appraisal, retention and disposition; records protection; records and information management technology." The Board of Regents provided a caveat that "two years of appropriate professional experience may be substituted for each year of education below the baccalaureate." At that time the fee to register was \$25 plus \$15 for each exam section. If a candidate wanted to challenge the exams it could be accomplished through certification by review for \$100.

The ICRM started with a completely paper-based application process by which potential CRMs were required to gather physical documentation, complete the application, mail it in and wait two to four weeks to find out if they were accepted as a candidate. In the fall of 2009, an optional online application process was introduced. By 2013, the application process had been converted to online-only with the approval process taking on average fewer than two business days.

Maintenance of certification wasn't far behind. Certification maintenance was designed to provide practitioners with a medium to maintain professional competence, update existing knowledge and skills and attain new or additional skills. Initially, the Board of Regents determined that "each CRM as part of their continuing eligibility be asked to submit a minimum of 5 essay questions and 5 multiple

choice questions during the course of the calendar year.” This was short-lived as the Board realized that most of the questions submitted were already part of the bank of exam questions. By 1989 certification maintenance had been revised to include 10 subject areas required to meet established criteria accompanied by supporting documentation. Starting in 2013, the various subject areas were streamlined to four subject areas (attending, presenting, publishing, and other work/professional RIM-related activity). It is easier to provide substantial proof of educational or experiential activities by logging in to the ICRM website and submitting the required evidence.

Starting in 1975, ARMA recognized individual CRMs who promoted the field of records management by their achievements, selfless commitment to the betterment of the members, and willingness to serve on Boards of Directors. Those recognized by these awards clearly adhered to the Code of Ethics, specifically Item VI: *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.* The Award of Merit, Outstanding Achievement Award and Britt Literary Award were conferred on no fewer than 24 CRMs in the next decade. The list of awardees reads like a Who’s Who of records management.

And how far we have progressed! Gone are the days of hand-written responses in Blue Books. It was a clumsy, time-consuming process to engage the proctors, collate test packets for each candidate and ship them to the appropriate proctor, then receive all the answer sheets for parts 1-5, bundle them up and ship them to University of Washington for automated grading. A decision in 2000 allowed test takers to type their answers on a computer and hand the floppy disk to the proctor. It was a necessary leap forward since there were more than 750 candidates qualified to take the exams. The Part 6 answers went to individual graders as they do now. Yet the process was considered an improvement over the previous process of distributing exams along with blue books in which the answers were written for parts 1 through 6. The ICRM began implementing the new electronic test-taking services (proctored by Pearson-Vue) early in 2007. By outsourcing to a professional test provider the ICRM was able to ease the workload of its volunteer resources, including the Regent of Exam Administration. This streamlined process allowed the ICRM to offer exams more frequently, increasing to three exam cycles each year, then expanding to four

exam cycles per year by 2009. This was an improvement for the candidate as well. Registration and cancellation could be done on-line with email confirmation and testing instructions sent after registration was complete. Candidates could choose a test center within a reasonable distance with test center staff monitoring the exams. No more beating the bushes for proctors! Test results were provided more quickly, easing the anxiety of candidates. In 2010 the qualification process was revised again to encompass more candidates. The scope of the exams was broadened to reflect more recent changes in best practices and technologies, allowing a larger number of candidates to qualify to take the exams. Another change was made to the format of the exams. Instead of one 60 point essay question and one 40 point essay question the Regent of Examination Development divided the two essays to count 50 points each. As of this writing there are 1,161 CRMs from around the world in good standing with the ICRM.

Taking a look back over the past 40 years provides the membership with an opportunity to understand how the ICRM came into being and why. How would the original group of visionaries view the ICRM as it is today? How does it compare with their initial aspirations? Has it made its way down a straight path or have new ideas challenged the status quo? We can now task ourselves individually and collectively to raise the bar, promote the field of records management, and provide our members with the support as well as educational opportunities to become the records managers of the future.

The mission of the ICRM was clear from the outset: it is a certification body. It establishes minimum standards for CRM certification and administers the process for certification. Born in the depths of professional records management organizations the ICRM has grown into an independent organization envisioned by a relatively small group of people with a germ of an idea, nurtured with determination to blossom into the organization we have today.

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<sup>1</sup> Dr. Wilmar Maedke, University of North Dakota; Dr. Roger Bloomquist, University of North Dakota; Dr. David Goodman, Wisconsin State University; Dr. Galen Stutsman, Bowling Green University; Dr. Mary Robek, Eastern Michigan University.

Special thanks to Ginny Jones for providing information on the evolution of the testing processes, Cheryl Pederson for providing archival materials, and Don Schewe, and the Board of Regents for reviewing the first draft and providing valuable comments.

Special thanks to Steve Whitaker whose article on the ICRM’s 20th anniversary was a significant source of information.

## PRESIDENT

(Continued from Page 1)

We will be sending out additional information on these events as we celebrate the Institute's 40<sup>th</sup> Anniversary. If you are a CRM who is currently mentoring a candidate, please remind the candidate(s) that the ICRM will host an Exam Prep event through the ARMA Designation Academy on Saturday, October 4 and Sunday, October 5. If you are a CRM currently pursuing the Information Governance (IGP) certification, ARMA will be hosting an exam prep event for the certification. Please click on the link below for full details on these events.

<http://arma.org/arma-conferences/dc-2015/education/designation-academy>

As strategic partners and thought leaders in records management and information governance, we want to remind you that ARMA will host its 60<sup>th</sup> Annual Conference. The Conference starts on Monday, October 5<sup>th</sup> and runs through October 7<sup>th</sup>, 2015. Please see link below.

<http://arma.org/arma-conferences/dc-2015>

I look forward to seeing you all in D.C. Please do not hesitate to contact me or any of the ICRM Board of Regents with questions you may have in conjunction with our activities at these events.

Best regards,



Rae Lynn Haliday, CRM, MBA  
President, ICRM

### 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 six months of the activity.

## 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.

## MEMBER IN SPOTLIGHT: PETER KURILECZ, CRM

Our Member in the Spotlight for the summer issue of *ProfessioNotes* is Peter A. Kurilecz. Peter has been very visible in the world of records management and has agreed to tell us a little about himself. When asked how long he has been a CRM he responded that he had 'received the CRM designation in 1988 back when the exams were done on stone tablets.' Now, everyone knows the ICRM first used those historic testing devices called Blue Books. Evidently Peter was ahead of his time.



While in school Peter majored in History and minored in Political Science, and took course work in Biology. He has a Master's degree in History from the University of Texas at Arlington as well as a Certificate of Archival Administration. Peter was working as a photo-archivist for the Dallas Public Library when he first heard about records management. "I realized that records management offered more opportunities than did the archives field," he recalls.

He goes on to write, "My first job in records management was as the records management coordinator for Diamond Shamrock International Petroleum, a subsidiary of Diamond Shamrock. In that position I coordinated the shipment of records, supported tax audits and was responsible for selecting a commercial records storage vendor. Probably the most interesting experience there was being able to produce invoices for a \$250 million sales tax audit. All the invoices were paper and I was able to produce all that were required. The Manager of Tax estimated that by being able to produce the invoices I was able to save the the company about \$25 million." THAT'S what records management is all about!

When asked who most inspired him in records management he wrote, "I don't think it was so much inspiration as influence. People like Alan Andolsen, Larry Medina and Hugh Smith were inspirational role models."

Peter's response to how records management has changed

since he first started he exclaimed, "Wow! We've gone from primarily shifting boxes of paper to wrestling with the problems of electronic records. But the majority of RM principles I learned early on are still very much applicable to the electronic environment."

As we all know, records managers are not confined to the dark recesses of basements and garages. We do get out and meet folks from all walks of life. When asked, Peter claims to have "...met the great Brazilian soccer player Pele at the Mexico World Cup in 1970." He doesn't share under what circumstances the two met. Perhaps enjoying a beer after the match?

Besides working in archives and records management Peter's passions include photography (follow this link and you'll see some of his work) <https://www.flickr.com/photos/pak152/sets> all the while claiming that he is not nearly as prolific as Ray Cunningham. (Does that sound like a challenge?) He collects antiques, primarily military art, enjoys cooking and has an extensive cookbook collection. He is also a voracious reader, plays golf, rides his bike and enjoys gardening.





# SPRING CLEANING: 5 TIPS TO ORGANIZE & TIDY YOUR OFFICE

**By Ellie Myler, CRM, CBCP,  
Corporate Records Manager,  
CITGO Petroleum Corporation**

Spring cleaning: Visions of Cinderella pop in my head, happily cleaning and singing with her crew of merry animal friends, shaking out carpets, tossing things in the trash, scrubbing floors, and polishing banisters. So how do we achieve this kind of thing in a corporate office? Here are five tips to get going on this for your office.

## **1. Timing is Everything**

Pick a time that is interruption and meeting free. For some, Fridays are good as it is the end of the week; most people are focused on the weekend and less likely to call last minute meetings. If Friday doesn't work, the next drastic step is to do this on a weekend, but usually weekends are not ideal as people are resting from the work week and catching up on family activities. Whatever the day, get in the spirit, wear jeans, order some pizza and crank the tunes. Give yourself and your team at least 2-8 hours to completely focus on the tasks at hand. If visitors wander into the office without official business, greet them, ask them what they need and then encourage them to move on. The last card here is to explain what is being done and ask them if they would like to help with the spring cleaning efforts. That usually gets them moving right away.

Typically, when you do this kind of project, you will think about all the other projects that need to be done, **especially when going through** old e-mails. Resist the urge to start doing a whole new project and thereby finding yourself in left field and abandoning the spring cleaning efforts. Remember **stay focused**, keep conversations short and resist the urge to check your e-mail and phones for new messages while you work. Give yourself 2-8 hours that goes into the evening but finish what you start so you don't come back to a half cleaned office the next day.

## **2. Look around your Office**

Take a look and see what sticks out. Are there any eye sores? Cluttered areas, piles of paper, things scattered on the floor? What about the walls and other display areas? While everyone likes to make their space their home as we do spend most of our waking hours there, be selective about what you display. If you don't have much space, get rid of excess to make room for the things you really need. You need to be choosy about what to keep here and some

items are better kept at home than in the office especially when you are trying to free up some energy in the room.

One rule of thumb I like to follow from Marie Kondo's "the life-changing magic of tidying up" is this: "Does this thing spark joy for you? If not, discard it. This includes items that are broken, have no purpose, and do not add value to you being productive during the day. Trust me; I have hauled out my own personal collections of water fountains, fish bowls, mood lights, trinkets, and other accessories that really didn't help me to stay focused on my work. Easy wins are throwing away old food containers, trash, empty boxes, and other debris cluttering up your work area and taking up valuable real estate on your desk. Pick up things from the floor where they may be able to get scattered and/or lost and place them in appropriate storage areas. Other sayings you may have heard of include: "Have a place for everything and keep everything in its place" (Benjamin Franklin) and "Out of sight, out of mind". Use these when you educate and train folks on keeping them motivated to stay engaged. The art of "Letting Go" can be difficult for folks but in some ways by performing this, one feels freer from obligations and can reach for new goals when not being weighed down by the past.

## **3. Sort and Group into Happy Families**

I know this sounds corny but think of it like a grocery store; the business will not operate optimally if the cashiers are in the back of the store, the groceries are all scattered about and ingredients are not grouped together. Offices can be creative spaces but try to group like things together and I don't mean stacking all paper in one corner of the room.

Tackle loose documents and stacks of paper. Decide what to toss and what to keep. Make sure to follow your company's retention schedule and if you don't have one, well, that is a subject for another rainy day. Start with the floor first, your desk, and then move into the file drawers and cabinets. Get rid of outdated documents, convenience copies, and items that you do not need to act upon or file. Create an "Action" file to keep track of daily incoming documents and place it on your desk in a visible area where you can act on it daily. So... "What about that paperless office"? While most information is generated and stored electronically, some still use paper as a way to convey information that is not easily demonstrated or portable in electronic format. While the goal is to be more paperless, we

(Continued on Page 9)



## SPRING CLEANING (Continued from Page 8)

have to control and manage ALL of it.

### **4. Make a Home for All Items**

Each item on your desk and in your office should have a home assigned for it. Decide what goes where, keep note taking supplies in one area and designate zones for your computer, phone, office supplies, and working files. Organize your desk so that you can have important things “within arm’s reach”. Use desk drawer organizers to contain small items and use the walls to post important reminders. Mount organizers on walls to contain items that take up desk space. If you have overhead bins or bookcases, use them to store books, binders, and reference documentation.

### **5. Decorating and Sustaining Your Newly Organized Office**

Once everything is organized and put away, take some time to personalize your surroundings. Keep it simple and remember that if the item doesn’t spark joy for you, get rid of it. Always have windows and open spaces unblocked to let the outside in and let energy flow freely. Visitor chairs should always be free and ready for sitting in, not for storing things on. Keep personal belongings out of sight. A word on trinkets and knickknacks; dare to be a minimalist and remember that we are not “our stuff”. The old adage of if it has been stored in a box, in the attic, garage, or closet and you haven’t used it in a year, “Let it Go”. Also, some items that you part with may be useful to someone else, so check out if things can be donated and/or recycled.

Maintain clean space on your desk to layout and review new documents and projects. This also creates an enhanced environment to receive visitors. Eat lunch away from your desk when possible to not only give you a break but to keep bugs from moving in on the

crumbs they love. Once the day is over, prepare your action items for the next day and clear the decks. Return items to the locations and wipe down the desk if it has gotten messy.

Organizing and keeping things tidy will help your state of mind, spark more creativity without unnecessary items taking up space, and let you work more productively throughout the days. A clean office also represents a safe and professional environment that is a priority for most organizations. Finally, once everything is done, reward your participants in creative ways. For one of my clients, I took his whole family to dinner after we left the office late on a Friday evening but when he came back the next Monday, he was admired by many for his improved office space.

***Disclaimer:** This article was presented as part of the 2015 ARMA Houston Armadillo Newsletter. The content presented in this document is for informational purposes only. The opinions expressed in this document and those of the presenter do not necessarily represent the official position of CITGO. References to other resources including links are for informational purposes only. Providing these links does not necessarily indicate CITGO support or endorsement of the site/s. CITGO is not responsible for the content or accessibility of any of the links or resources listed.*

*Ellie Maier is the Corporate Records Manager for CITGO Petroleum Corporation. She has been in the field for 26 years and has published articles and received the “2007 Britt Literary Award” from ARMA International. She is a Certified Records Manager, Certified Business Continuity Professional and holds a Change Management certification. She currently serves as the ICRM Committee Manager for the Houston ARMA Chapter and leads CRM workshops, discussions, and study groups.*

## NEW CRMS FROM MAY 2015 EXAM CYCLE

### *PLEASE WELCOME OUR NEWEST CRMS*

Danielle Kohls Dellinger, CRM  
Aurora CO

D’Anderia M. Dunham, CRM  
Houston TX

Debra J. Ferguson, CRM  
Philadelphia PA

David P. Gray, CRM  
Fallbrook CA

Terrance McCluskey, CRM  
Jacksonville FL

Jordan L. McKee, CRM  
Kansas City MO

Peggy A. Meinhardt, CRM  
Orlando FL

Margaret A. Melberg, CRM  
Linden VA

Thomas W. Shanahan, CRM  
LaCrosse WI

David S. Van Nederynen, CRM  
Metairie LA

Romaine M Williams, CRM  
Portland OR

Ivone M.B. Zbrog, CRM  
Winnipeg MB, Canada

# ICRM ELECTRONIC TESTING SERVICES

By Virginia A. Jones, CRM, FAI

At the fall 2006 Board meeting in San Antonio, Texas, the ICRM Board of Regents signed an agreement with the third party provider, Pearson VUE, to administer all six of the CRM exams.

The ICRM began implementing the new electronic services early in 2007 at the same time developing and implementing a candidate data base accessible via the website. The initial contract included all test registration, providing the exams via computer at testing centers, testing center monitoring of the exam process, providing grades and feedback to candidates, and uploading grades to the new candidate database.

By outsourcing to a professional test provider the ICRM was able to ease the workload of its volunteer resources, including the Regent of Exam Administration. The new process allowed the Institute to begin offering the exams more frequently, increasing to three exam cycles each year. By 2009 the Institute had expanded to four exam cycles per year.

The new process included a number of new policies and procedures for the examination process. The preliminary process design included the following changes to the then current process:

- Pearson VUE received a download from the ICRM listing candidates approved to take exams. This list included those candidates approved through the original application process, those candidates who have reactivated their candidacy, and reinstatement candidates.
- Approved candidates registered to take exams via the ICRM web site. Payment was processed via credit card. There was a procedure for paying via check for an additional fee.
- Candidates registered for a particular exam cycle up to one week prior to the first day of that cycle.
- Candidates could cancel an exam registration up to 24 hours prior to the scheduled exam. No shows and exam cancellations made less than 24 hours prior to the scheduled time period forfeited their fees.

- Parts 1-5 would be offered for one week during each exam cycle. Candidates registered to take any or all of parts 1-5 on any convenient day during that week.
- Part 6 would be offered on only one day of each exam cycle. However, candidates may choose from staggered start times during that exam day.
- Candidates chose a convenient testing center location from the list of locations offered by Pearson VUE.
- Candidates received an e-mail confirmation and testing instructions upon completion of their registration.
- The testing centers include staff to monitor the exams and to assist with understanding how the logistics of the exam process works. Testing center staff were not allowed to answer any questions about the content of the exams.
- Candidates were required to agree to a non-disclosure statement before being allowed to proceed with each exam.
- Upon completion of each exam part 1-5, candidates received their grade for that exam. This grade, subject to verification, was posted to the candidate's profile in the new candidate database.

Looking back now, the benefits seem a no brainer, but at the time it was a considerable change. By streamlining the testing process, the ICRM not only improved the testing experience for the candidates, but relieved many of the time consuming administrative duties for the office of Regent for Exam Administration, thus allowing this Regent time to focus on the governance duties of the position.

## 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 [newsletter-editor@icrm.org](mailto:newsletter-editor@icrm.org). All items must be in MS Word or MS Excel format. Photographs may be in .jpg or .tif format.

# THE CANDIDATE COACH: PART 6 MENTORING

By **Howard Loos, CRM**  
**ICRM Mentoring Coordinator**

Serving as a mentor is an act of service and provides valuable one-on-one guidance to ICRM candidates, our future CRMs. Performing this service also 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](mailto:mentor@icrm.org). Registering is a simple but necessary step for earning your credits. When emailing the mentor coordinator please include your candidate's name, email address and which exam cycle in which your candidate plans to take the Part 6 exam.

## MEETINGS AND MINUTES

The ICRM Board of Regents meet on a quarterly basis by conference call as well in person at the Spring Board Meeting held in Albany, New York. The meetings are hosted by the Institute's administrative management firm, CHMS, and the Fall Board Meeting is held prior to and in conjunction with the annual ARMA International Conference. Strategic Planning sessions and the majority of business that requires discernment and voting occurs primarily during the in-person meetings. However, voting does occur as needed throughout the year by electronic means and during the scheduled conference calls. The discernment and consent agenda process is used to facilitate productive and orderly meetings.

The Minutes of the Board of Regents meetings are provided to the members of the Institute. Any member of the ICRM can request to attend a meeting of the Board of Regents.

<http://www.icrm.org/governance/meetings-and-minutes/>

### Conference Calls

- \* June 16, 2015
- \* September 15, 2015
- \* December 15, 2015

### Spring and Fall Board Meetings

- \* [May 1-3, 2015 – Albany, NY](#)
- \* October 3-4, 2015 – Washington, DC

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 questions and answers should help answer questions you may have about serving as a mentor:

What will be 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 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?

- The components of the ICRM Handbook are available on the ICRM website. All of the sections of the handbook are now fully integrated into the ICRM website.
- Practice exams with answer guides. Each year the ICRM retires a few exams. One or more of these exams are given to candidates who participate in the mentoring program. The graders' instructions are provided to the mentor to assist in the practice exam feedback process.
- Part 6 Study Guide is designed to give study tips to candidates, as well as provide practice exams and grader instructions.

Can you mentor more than one candidate during an exam period?

- Yes

If I mentor a candidate for two or more exam periods before they pass the exam, can I receive credit for each exam period?

- You can receive three credits for each exam period as long as the candidate completed a practice exam and you provided constructive feedback to the candidate.

How do I receive my credits?

- Register as a mentor by sending an email to Howard Loos at [mentor@icrm.org](mailto:mentor@icrm.org). Please include the candidate's name, their state or country and the exam period in which they plan to take the exam.

## ALAN ANDOLSEN “MENTOR OF THE YEAR” AWARD

The Institute of Certified Records Managers (ICRM) established the Alan Andolsen “Mentor of the Year” Award at their Spring Board Meeting in April 2011. The award was created to recognize an individual who, in the opinion of the Awards Committee, has contributed significantly to the ICRM by mentoring activities. Qualification for this award shall be as follows:

1. A Certified Records Manager (CRM) in good standing who has contributed significantly to the ICRM and to certification by mentoring activities. These activities should be over a longer than one year period and have impacted more than one individual. Mentoring activities include, but are not limited to the following:
  - a. Individual mentoring and coaching;
  - b. Promoting the CRM designation;
  - c. Teaching/presentation at CRM Prep seminars or other venues;
  - d. Hosting or contributing to CRM study groups;
  - e. The committee may take other relevant information into account as well.
2. No member of the Board of Regents shall be eligible for the award for a minimum of two years after leaving the Board.

The award will be presented at the ICRM Annual Business Meeting to be held in conjunction with the ARMA International Annual Conference. Nominations are open to the ICRM membership as a whole, and selection will be made by a three-member Awards committee composed of the Chairman of the Board, the President-Elect and the Regent, Legislation and Appeals. Nominations can be made by a non-CRM (i.e. President of an ARMA Chapter); however, only CRMs are eligible for this award.

Please complete the nominations form below with the award nominee’s name and submit an attached WORD document containing a narrative stating their qualifications which includes, at a minimum, the number of years they have been mentoring, the specific mentoring activities, the total number of CRM Candidates who have been assisted (if known) and any promotional activities they have launched. Testimonials from persons who have been mentored by this person may also be included.

Please submit the above mentioned documents by **September 11, 2015** (close of business day) to both of the following individuals/addresses through standard mail or e-mail:

Rayanne Waggoner CRM  
 Chairman of the Board  
 653 West Garland Terrace  
 Sunnyvale, CA 94086  
 Or e-mail: [chair@icrm.org](mailto:chair@icrm.org)

Steve Grandin  
 Institute of Certified Records Managers  
 1450 Western Ave, Suite 101  
 Albany, NY 12203  
 Or e-mail: [admin@icrm.org](mailto:admin@icrm.org)

Nominee’s Name: \_\_\_\_\_

Company/Address: \_\_\_\_\_  
 \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Telephone No.: \_\_\_\_\_

Nominator’s Name: \_\_\_\_\_

Nominator’s E-mail: \_\_\_\_\_



## ICRM PRE-APPROVED CMP ACTIVITIES

Date	Title	Type	Credits	Sponsor	Site
8/25	Developing an Information Governance Communications Strategy	A	1	ARMA International	Overland Park, KS
8/25	Creating a Strategic Information Governance Roadmap	A	1	ARMA International	Overland Park, KS
8/25	Building a Business Case for an Information Governance Initiative	A	1	ARMA International	Overland Park, KS
8/26	Records Management Conference @930gov	A	4.5	Digital Government Institute	Vienna, VA
8/27	Digital Forensics: Fundamentals	A	6.5	Society of American Archivists	Sacramento, CA
8/27	2015 Information Governance Conference	A	3.5	Zasio	Boise, ID
9/9	2015 ASAP FOIA/Privacy Act Training Workshop	A	15	ASAP	Chicago, IL
9/16	2015 Information Governance Conference	A	3.5	Zasio	Salt Lake City, UT
9/17	Arrangement and Description of Electronic Records, Part I and II #1608	A	13	Society of American Archivists	Austin, TX
9/18	Appraisal of Electronic Records #1623	A	5.5	Society of American Archivists	Milwaukee, WI
9/22	AIIM Road Trip: Going Paper Free: Automate and Simplify Your Business Process	A	4.5	AIIM	Calgary, AB
9/24	AIIM Road Trip: Going Paper Free: Automate and Simplify Your Business Process	A	4.5	AIIM	Toronto, ON
9/25	wcoARMA Fall Seminar	A	3	wcoARMA Chapter	Aspen, CO
10/1	AIIM Road Trip: Going Paper Free: Automate and Simplify Your Business Process	A	4.5	AIIM	Rosemont, IL
10/3	Protecting Long-Term Records with Practical Standards-Based Digital Preservation	A	6.50	ARMA International	Washington, DC
10/4	Essentials of Enterprise Search Certificate	A	6.50	ARMA International	Washington, DC
10/4	Retention Program Development Certificate	A	6.50	ARMA International	Washington, DC
10/4	Getting Information Governance Off the Ground: An IG Bootcamp (IGI)	A	6.50	ARMA International	Washington, DC
10/5	Government Symposium	A	13.0	ARMA	Washington, DC

## ICRM PRE-APPROVED CMP ACTIVITIES

Date	Title	Type	Credits	Sponsor	Site
10/5	ARMA International Annual Conference	A	18.5	ARMA International	Washington, DC
10/8	AIIIM Road Trip: Going Paper Free: Automate and Simplify Your Business Process	A	4.5	AIIIM	Minnetonka, MN
10/13	AIIIM Road Trip: Going Paper Free: Automate and Simplify Your Business Process	A	4.5	AIIIM	New York, NY
10/15	AIIIM Road Trip: Going Paper Free: Automate and Simplify Your Business Process	A	4.5	AIIIM	Washington, DC
10/22	AIIIM Road Trip: Going Paper Free: Automate and Simplify Your Business Process	A	4.5	AIIIM	Houston, TX
10/27	AIIIM Road Trip: Going Paper Free: Automate and Simplify Your Business Process	A	4.5	AIIIM	Garden Grove, CA
10/29	AIIIM Road Trip: Going Paper Free: Automate and Simplify Your Business Process	A	4.5	AIIIM	San Francisco, CA
11/11	2015 Information Governance Conference	A	3.5	Zasio	Portland, OR
11/12	2015 Information Governance Conference	A	3.5	Zasio	Seattle, WA

## THE ICRM HANDBOOK – REST IN PEACE (AND OTHER WEBSITE HAPPENINGS)

By **Bruce White, CRM**  
**ICRM Webmaster**

If you haven't noticed, the ICRM Handbook, a staple for those applying for candidacy and preparing for the exam, no longer exists except in name only. All of the sections are fully integrated into the ICRM website. We currently have a placeholder on the main landing page, and eventually that will go away, too.



The ICRM Handbook has been a staple of our organization for years. I suspect the document has been around in some form or fashion since the founding of the ICRM. Since then it morphed into a 38 page catch-all document, from the Code of Ethics to the Application Process to Certification Maintenance – everything you wanted to know about the ICRM but were afraid to ask. For current CRMs or current candidates the Handbook was a one-stop place.

As the Handbook's length grew keeping it up to date be-

came a challenge. Early this year the Board agreed to incorporate the components of the Handbook into the ICRM website; that is now a reality. Everything from applying for candidacy, preparation resources for the exam, or trying to determine what categories are available for maintaining your certification are now available on the website.

The website team is also in the process of updating the website giving it a new look and feel. I've had a chance to look under the covers and am excited. I believe you will like it as well. Stay tuned.

One item of note: Over the past few months we have received a number of requests to reset passwords for both members and candidates. All messages will be sent to the **primary** email address in your contact profile. If this needs to be updated please contact our admin office at [admin@icrm.org](mailto:admin@icrm.org). If the primary address is correct and you haven't received the reset message you may want to check your spam folder first before contacting the admin office.



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.

For more information about becoming a Certified Records Manager, **contact (518) 694-5362** or visit [www.icrm.org](http://www.icrm.org)

