



The Record

A Publication of the Greater Columbus Ohio Chapter of ARMA International

September 2007

Message from The Chairman of the Board

Let me be the first one to welcome everyone back to the ARMA meeting season. I hope everyone had an enjoyable summer. You can always tell when it's time for the ARMA meetings to start again because the start of school and football season precede the first meeting. We have some great events planned for the upcoming year.



Columbus, Ohio

[More Details](#)

September Chapter Meeting

The mock trial of *Smith v. Acme Auto and Tip Top Tires*



Sept. 19, 2007, 12:30 p.m. to 5 p.m.

**Gahanna Municipal Court
200 South Hamilton Rd.
Gahanna, OH 43230**

Don't miss attending this invaluable mock trial that may keep your own company out of the defendant's seat!

[More Details](#)

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Community Service

The ARMA International Greater Columbus Chapter is involved in different types of community service. The Board of Directors Community Service Director is Rebecca Coldiron. She organizes events for member participation.



ARMA International's Greater Columbus Chapter is involved in Community Service.

One community service event that has been successful over the years is the Merry Beary donation drive. Teddy Bears, baby blankets and other stuffed animals are collected during the month of December to give to Children's Hospital.

The larger teddy bears are sent to the school of the child that is in the hospital to explain why the student is not in school. The large teddy bear sits at the hospitalized child's desk. Other stuffed animals and blankets are given to children in the hospital.

Start collecting teddy bears now for the Merry Beary donation drive. Items will be collected during the December chapter meeting.



The Record is published in PDF format ten (10) times a year from September—June. This publication is for members of the Greater Columbus Ohio Chapter of ARMA International, The Association for Records & Information Management Professionals. ARMA International is the Association for Records Managers and Administrators.

Questions or Comments?

Email the ARMA Greater Columbus Ohio Chapter Newsletter Director, [Melissa G. Roach](#), CPM.



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Message from The President of the Board *cont.*

The September meeting will feature a group from Nationwide Insurance and a couple of ARMA Columbus Chapter members conducting a mock trial. The title is "Records Management Programs Exposed." The chapter hosted a mock trial a couple of years ago and it was a great hit with membership. Seating is limited, so reserve your spot now!

I wanted to also mention that the ARMA Columbus Chapter sent seven (7) board members to the Great Lakes Leadership Conference in Cincinnati held August 10-12, 2007. We had the biggest delegation. Every single one of us learned some valuable information. The conference always has great speakers and presentations.

The last thing I'd like to mention is that we have had two people resign from our board in the last month. One person received a promotion and due to new responsibilities will not be able to fulfill the time requirements of the position. The other person has decided to step away from the workforce to go back to school and get married. We are very excited for these individuals as they move onto the next phase of their lives. With that being said, we are currently looking to fill the positions of Corresponding Secretary and Marketing Director. If you are interested in filling one of these positions, please contact a Board Member. I look forward to seeing you at the first meeting.

Mike Purington, Chairman of the Board

September Chapter Meeting *cont.*



The mock trial of *Smith v. Acme Auto and Tip Top Tires*

Come act as the jury as Acme Auto and Tip Top Tires highlight their records retention programs in defense against allegations of evidence destruction and cover-up. Both companies stand accused of mismanaging and destroying critical documents.

Cost of Admission: \$10 for members and \$15 non-members

Register Online www.armacolumbus.org

2007-2008 ARMA International Greater Columbus Ohio Chapter Board of Directors



Congratulations to the 2007-2008 ARMA International Greater Columbus Ohio Chapter Board of Directors. The newly elected members officially began their duties this summer. They met to discuss the upcoming year, and planned for an exciting year.

Chairman of the Board

Michael Purington

Treasurer

Bob Eudy

Corresponding Secretary

vacant

Marketing Director

vacant

President

Cathy Stanley

Seminar Director

Yvonne Harris

Membership Director

Kathy Clark

Newsletter Director

Melissa G. Roach

President-Elect/Program

Director

Dean Ingram

Recording Secretary

Sheila Campbell

Community Service

Director

Rebecca Coldiron

Web Administrator

Jim Fielden



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Lessons Learned *by Sharon Montgomery*

Being records managers, we naturally and unavoidably write records request policy and procedures from the records custodian's viewpoint. This is not to say that we aren't professional enough to avoid that bias as much as we are able. However, it's hard to write from someone else's perspective if we aren't familiar with that perspective.

I am a municipal records administrator and a traffic safety activist. In my advocacy, I make public records requests. A particularly poor experience I had recently with an out-of-state law enforcement agency makes a wonderful "lessons learned" model.

The agency Web site does not include instructions or a link for making the most common records requests: crash reports. The site does not give e-mail addresses.

The generic "contact us" link offers only an online form to complete and submit. This allowed me to ask for crash report request procedures (who to contact, what and when to pay, etc.) but gave me no "audit trail" of my communications because my message was not sent using my e-mail program.

I wanted to be able to track my communications in case there were problems or unwarranted delays. My fears were realized: after a week, I had no response. I submitted a second request for procedures and waited another week.

To phone during business hours, I had to call from work, using my calling card—a more expensive way to make a toll call. The phone rang 10 times with no answer by a person or voice mail.

A few days later, I had a vacation day so I phoned from home. The person who answered acknowledged that it was hard to find on their Web site, but that a paragraph under a shopping cart symbol had the word "forms" in it.

If I clicked on "forms" I would get a records request form to download.

I revisited the Web site, thoroughly reading every page including those that clearly had nothing to do with crash reports. There was no shopping cart so of course there was no paragraph under it (or anywhere else) with the word "forms" in it.

I submitted a third online communication and finally got a response. The answer was a simple one that could have been on the Web site or at least quickly sent to me on my first contact, weeks earlier. Crash report requests have been outsourced. I was given a contact name, phone number, and e-mail address and incomplete information about request options.

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Lessons Learned by Sharon Montgomery cont.

I e-mailed the contact person asking if the fee I was quoted applied to fax as well as mailed copies. The response was that I had to pay in advance by "company check" or money order.

I e-mailed again to ask if the fee applied to faxing the request, and if so, whether the check should be payable to the vendor's corporate name or online name (which were different).

About a month after starting my quest, I finally had enough information to make my request. A little over a week later the records arrived. Each step of my quest could have been simpler or eliminated.

The "lessons learned" are based on the well-known fact that requesters need some common, predictable information. For good customer service (remember that first impressions are lasting impressions) and efficient use of employee time, that information needs to be made readily available at the sources a requester would use to start the request process.

If a company or public office has a Web site, make records requests an easily found page or link. At that page or link, provide the basic who/what/when/where/how and contact information.

If there is no Web site, make records or information requests a separate listing in the phone directory and make sure the voice mail greeting includes, and any employee answering that phone line knows, the basics.

Private companies need to make records readily available because they depend on public goodwill to maintain a sufficient customer base.

Public offices need to make records readily available because the public owns the records.

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Sharon Montgomery is a member of the ARMA International Greater Columbus Ohio Chapter.





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About the Institute of Certified Records Managers

The Institute of Certified Records Managers (ICRM) is an international certifying organization of and for professional records and information managers.

The ICRM was incorporated in 1975 to meet the requirement to have a standard by which persons involved in records and information management could be measured, accredited and recognized according to criteria of experience and capability established by their peers.

The ICRM is an independent non-profit organization administered by a Board of Regents (the Board) in accordance with the Constitution and By-laws of the Institute.

Objectives

The primary objective of the ICRM is to develop and administer the program for professional certification of records managers, including certification examinations and a certification maintenance program.

The ICRM serves as the official certifying body for both the Association of Records Managers and Administrators, International, (ARMA International) and the Nuclear Information and Records Management Association (NIRMA).

Membership

Certified Records Managers (CRMs) are professional records and information managers from a growing number of countries including the United States, Canada, New Zealand, Australia and Japan.

Each individual is experienced in active and inactive records systems, and related disciplines such as archives, computerization, micrographics, and optical disk technology.

CRMs receive the CRM designation by meeting both educational and work experience certification requirements established by the ICRM and by passing the required examinations.

Responsibilities of Certification

To remain a CRM in good standing and thereby be authorized to use the personal designation of "CRM", a person must conform to requirements set by the Board.

This includes fulfilling the requirements of the ICRM Certification Maintenance Program as outlined below. CRMs are expected to conform to the ICRM Code of Ethics (see Code of Ethics in Menu) and participate in activities to improve the records management profession.

The Board may revoke the Certification of any CRM it determines is not in good standing.

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About the Institute of Certified Records Managers *cont. from page 5*

Benefits of Certification

Research has shown that CRMs and CRM candidates believe that attaining certification status results in enhanced professionalism and personal growth.

The records and information management knowledge gained through the certification process and the improved attitude of self-esteem and confidence can result in CRMs obtaining increased job responsibility with commensurate salary benefits.

CRMs receive a Newsletter and access to the ICRM web site. Each CRM is also entitled to attend the ICRM Business Meeting and the ICRM reception held at the Annual ARMA International Conference.

Individuals who have qualified as examination candidates, but who have not yet completed the process also receive the Newsletter and may attend both the Annual Meeting and Reception.

The ICRM is a volunteer organization. CRMs assist in the development of professionalism in records and information management and the promotion of the value of certification for records managers.

They share their experience and knowledge by participating in ICRM committees and through writing, teaching, and speaking.

The annual membership fee is currently \$150.00 (US) for regular members and \$10.00 (US) for retired members.

The Certification Process

Attaining the CRM designation is based on educational background, work experience and the passing of a six part examination.

The six part examination is divided into:

Part 1 Management Principles and the Records Management Program

Part 2 Records Creation and Use

Part 3 Records Systems, Storage and Retrieval

Part 4 Records Appraisal, Retention, Protection and Disposition

Part 5 Equipment, Supplies and Technology

Part 6 Case Studies

Parts 1 to 5 each consist of 100 multiple choice questions. Part 6 consists of case studies which require essay responses.

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About the Institute of Certified Records Managers *cont. from page 6*

Applying for the Examination

Persons wishing to become a CRM must complete and submit an application form ([ICRM Form #01](#)) with supporting documentation indicating acceptable work experience and education.

These credentials are reviewed and evaluated by the ICRM's Certification Standards Committee to determine if the certification requirements have been met.

When the application has been approved and the applicant accepted as a CRM Candidate, the candidate must then apply to take specific parts of the examination using [ICRM form #05](#).

Application Fees

Prospective candidates pay a non-refundable \$100.00 (US) fee for processing of their original application and evaluation of credentials.

Applicants who fail to meet mandatory qualifications will be required to resubmit a new application form (including a new \$100.00 (US) processing fee) if they wish to request reconsideration more than one year after the date of the original application.

A fee of \$100.00 (US) per examination is charged for Parts 1 to 5. The fee for Part 6 is \$150.00 (US).

These fees are only refundable if an applicant cancels his/her registration more than one month prior to the examination date.

Professional Work Experience

The ICRM has determined that a professional records and information manager must have acceptable work experience in three or more of the following categories:

- Management of a Records Management Program
- Records Creation and Use Active Records Systems
- Inactive Records Systems
- Records Appraisal, Retention and Disposition
- Records Protection
- Records and Information Management Technology
- Records Management Education, Training and Awareness

Acceptable work experience may have been acquired if a person has:

- conducted studies and surveys or developed, designed, and implemented records management systems;
- has direct managerial or operational responsibility for programs;
- or has taught in an accredited college/university on a full time basis courses in records management.



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Education

The optimum combination of experience and education requirements are a baccalaureate degree from a four-year accredited college and three years of full time or equivalent professional experience in records management.

The Certification Standards Committee of the Board may, at its discretion, accept two years of additional experience as a substitute for one year of education.

Applicants may not sit for the examination until their credentials (the application form with supporting documentation) have been approved by the Certification Standards Committee.

Applicants who, in the judgment of that Committee, do not furnish adequate written documentation of acceptable education and experience will be notified and offered the opportunity to provide additional supporting material.

If acceptable documentation is still not received by the appropriate date, their files will be closed. They may apply again (as a "Resubmission") at such time as they can provide the proper documentation.

Taking the Examination

The first five examination parts may be taken in any sequence the candidate desires or a candidate may sit for Parts 1 to 5 of the examination at one time.

Part 6 may be taken only after the candidate has passed the first five parts. Candidates may retake any part of the examination as often as necessary, within a five year period.

Examinees are allowed 80 minutes for each part when taking parts 1 to 5 of the examination. Part 6 (Case Studies) has a four hour time period, exclusive of time needed for administrative purposes.

Grades

The passing score for each part of the examination is 70%.

Completion Time Required

All parts of the examination must be passed within a period of five consecutive years.

If an applicant fails to do so, the part(s) taken and passed initially must be repeated so that the passing of all parts occurs within a five-consecutive-year period. This period will be five years from the date that the first examination has been passed.

A candidate must take at least one part of the examination within two examination cycles of having received approval as a candidate.

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