

Newsletter of  
The Archives Industry Specific Group of ARMA International  
and  
The Records Management Round Table of the Society of American Archivists

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Joint Committee Wins Cooperation Between ARMA and SAA

By Nancy M. Kunde, CA, CRM

During 1998-99, the Joint Committee of the Association of Records Managers and Administrators International (ARMA) and the Society of American Archivists (SAA) continued to move forward on a variety of activities and topics. The following is a brief summary of activities, current initiatives, and proposed initiatives.

Accomplishments

**Program Sessions.** The Committee continued its practice of sponsoring a program session at both national conferences. In 1998, the session was on the topic of information policy and the Internet. The presenters were: Pat Cunningham, CRM, Hewitt Associates and Fred Stielow, Mid-Hudson Library System. Jac Treanor, Chicago Archdiocese presented for Fred Stielow at the Orlando SAA meeting.

**Information Booths.** The Joint Committee arranged to have each organization's booth at the other's national conference. The SAA Records Management Roundtable provided staff to the ARMA booth at the Orlando meeting.

**Standards Review.** Through the efforts of the Joint Committee, the draft of the Records Management Glossary was circulated to the archival community for comment. The Joint Committee is also an active voice in the review of the proposed international records management standard.

Archives Workshop. Through the efforts of the Committee, the SAA Business Archives Workshop will be offered in connection with ARMA Cincinnati Conference this fall. It will be offered as either a pre or post- conference workshop.

Conference Programs. The ARMA Board of Directors approved a resolution from the Joint Committee that recommends that the ARMA International Program Committee incorporate at least one program session sponsored by the Joint Committee. A similar resolution will be brought forward to the SAA Council for consideration.

Program Proposals. The Joint Committee was invited to develop a track of sessions for the SAA 1999 meeting. The Committee submitted a set of four session proposals, two of which were accepted. It is anticipated that the same two sessions will be a part of the 1999 ARMA Conference.

### Annual Meeting

The Joint Committee held its annual meeting March 19, 1999 in Kansas City. The Committee rotates its annual meeting between the two headquarters cities of the two associations.

This is a very important working meeting for the Committee. It is a time to formulate objectives for the coming year and provide an opportunity for much lengthier discussion on the future direction of Joint Committee activities.

The Joint Committee held two informal meetings in 1998; one at each national conference. These sessions were valuable in obtaining feedback from others on Committee activities and suggestions for areas of future cooperation between the two organizations. The Committee continues to work closely with the SAA Records Management Roundtable and the ARMA Archives ISG. See future proposals.

Appointments made to the Committee this past year include: Dr. Richard Cox, University of Pittsburgh-School of Library & Information Studies (SAA member), Michael Kurtz, NARA (SAA member), Pat Cunningham, CRM, Hewitt Associates (ARMA member), and Nancy Kunde, CRM, CA (ARMA member). Kunde was appointed to serve one additional year by Christine Ardern, President of ARMA International.

### Future Proposals & Activities:

The Joint Committee will seek early involvement in each organization's annual conference planning process. The Committee is eager to see a plenary session be developed and approved for both annual conferences that would highlight some common themes shared by both professions.

The Committee will be bringing forward a modification to its Committee Mission & Methods Statement which will have the outgoing chairs of the SAA Records Management Roundtable and the ARMA Archives ISG becoming members of The Joint Committee. The

Joint Committee discussed the possibility of developing or facilitating the development of shared position statements on issues that impact both professions and ways to team up on advocacy issues.

The Joint ARMA / SAA Committee expresses its appreciation for the continued support it receives from both organizations.

Nancy Kunde, CRM, CA, Joint ARMA/SAA Committee Chair. 1998-99.

Notes From the Chairs

SAA Roundtable

## ARCHIVISTS & RECORDS MANAGERS TO TACKLE MUTUAL CONCERNS

By Randy Jones, Chair

Last year was a great year for the advancement of records management professionals in our respective organizations. Thanks to the involvement of everyone in both the ARMA Archives ISG and the SAA Records Management Roundtable, I believe that progress is continuing on issues concerning us all. The Roundtable has submitted excellent proposals to the SAA Program Committee and should be hearing from them shortly about their acceptance. The Joint ARMA -SAA Committee chaired by Nancy Kunde is also sponsoring several proposals which will be presented at both SAA and ARMA conference.

With the New Year comes optimism for the future and recommitment to our resolve to preserve in our aims. One very important request I would like to make to all members of both the ISG and the Roundtable is that we should all become involved in encouraging more joint records management and archival activities at the local level. I believe the ultimate success of our aims will be cemented by establishing a presence at the grassroots level. While we continue to make progress towards mutual objectives at the national and international level, we should encourage our archival groups and ARMA chapters and regions to sponsor educational seminars espousing the value and need of both archives and records management programs. Many at the local level are still uninformed about our joint activities, and old notions such as the "separateness" of our two professions are still stubbornly clung to. A while back, a local ARMA board member told me that archivists and records managers could never bond together to tackle mutual concerns. I explained that we had been doing so for several years now and wanted to know where he had been. He seemed genuinely surprised by this news.

Therefore, why not invite an archivist to your next chapter meeting or regional conference? Why shouldn't the archivists invite records managers to their respective regional conferences? By doing so, I am firmly convinced, we can build up a constituency among our fellow professionals who will provide support for initiatives sponsored by the ISG, the Roundtable, and the Joint Committee.

Archives ISG

## OHIO COUNTY ARCHIVIST NEW ARCHIVES ISG LEADER

Gillian M. Hill, will be the new leader of the Archives ISG, replacing Albin Wagner, CA, CRM. Albin is the new Manager of the Education Group in ARMA, which is made up of three ISG's, including the Archives ISG, Educators ISG, and Educational Institutions ISG.

Gillian Hill is the Greene County Records and Information Manager/Archivist in Xenia, Ohio. She has an extensive background in archives and records management. She can be reached at Greene County Records Center and Archives, 140 East Main St., Xenia, OH 45385, Telephone: (932) 376-8651. Fax: (937) 376-8653, E-mail: gillhill@juno.com

Archives ISG

## ARCHIVES ISG HOLDS SUCCESSFUL ANNUAL & MID-YEAR MEETINGS

By Gillian Hill, Leader

The Archives ISG held a very successful networking session at the 43rd annual international convention of the Association of Records Managers and Administrators (ARMA International) in Houston on Oct. 3, 1998.

The session included a report by Chairperson for the Joint ARMA-SAA Committee Nancy Kunde, CRM, CA, concerning the joint activities of ARMA and the Society of American Archivists, including registrations at their annual meetings at their members' rates and joint meetings between the boards of the certification programs of the two professions--the Institute of Certified Records Managers (ICRM) and the Academy of Certified Archivists (ACA).

Archives ISG leader, Albin Wagner, CRM, CA, also made two presentations which featured handouts; one on courses and degree programs available for archivists and records managers over the Internet and a second presentation on new national and international standards for archival storage of records.

The first issue of GRIST, the joint newsletter of the Archives ISG and SAA's Records Management Roundtable, was available for those attending the ISG Networking Session and conferees that visited the ARMA Member Services Lounge. David Horn, CRM, CA, of the ARMA Archives ISG and Sharon Laist, CA, CRM of the SAA Records Management Roundtable are co-editors of the newsletter. Archives ISG members are encouraged to submit articles and news items for the new newsletter.

Archives ISG also held a mid-year meeting at the ARMA ISG Seminar at the Jimmy Carter Presidential Library in Atlanta, Georgia in April 6-8, 1999. The seminar was held by the Archives ISG in conjunction with the Federal, State and Local Governments, Educators, Educational Institutions, and Government Contractors ISGs.

The group participated in the ISG Mid-Year Seminar with many of the same ISGs at the Archives II facility of the National Archives and Records Administration (NARA) last spring, April 1-2, 1998. The Archives ISG took an active part in planning the Mid-Year Seminar in Atlanta, which included a number of sessions on archival-related topics.

Archives ISG leader, Albin Wagner, made one of the presentations at the seminar on virtual reality as a new technology for records and information storage and retrieval.

The Archives ISG is currently working on a number of publications, including a tool kit or resource guide to assist records managers who also are responsible for archives and archival records. Such a guide would help make the publications and other resources of archival organizations such as SAA, ACA, ICA, AASLH and other regional and special interest associations available to ARMA members. A directory of distance education programs for archivists and records and information managers is also being compiled.

### SAA Roundtable

#### SAA ROUNDTABLE LIST AIDS COMMUNICATION

The Records Management Roundtable operates a listserv to facilitate communication within the Roundtable. This listserv is open to all archivists and who have responsibility for or just an interest in records management. It is to be used solely for information, comments or questions regarding the SAA Records Management Roundtable and its companion groups, the ARMA Archives ISG and the SAA/ARMA Joint Committee. It is not designed to replace or augment the Records Management listserv. The listserv is managed by Edward L. Galvin at Syracuse University.

To subscribe, send the following message to [listserv@listserv.syr.edu](mailto:listserv@listserv.syr.edu):

SUB SAARMRT your name

Archives ISG

#### ARMA ARCHIVES ISG TO MEET IN CINCINNATI

The members of the Archives ISG invite you to join them at their annual meeting Oct. 17, 8:00 a.m. to noon during this year's ARMA International Conference in Cincinnati, Ohio.

Join other records managers in a networking session on archives and the management of permanent and long-term records. The meeting will include a presentation by Charles Arp, Assistant Archivist of the State of Ohio concerning his work with the National Forum on Archival Continuing Education (NFACE). The new Archives Tool Kit will be reviewed, and archival storage and preservation of records will be among the topics discussed.

Archives ISG

## “ARCHIVES 101” CLASS AT ARMA CONFERENCE

The Archives ISG will be sponsoring a special session at the ARMA International Conference to be held October 17-20, 1999 in Cincinnati, Ohio. The session, entitled "Archives 101: An Introduction to Archives and Preservation of Historical Records for Records and Information Managers," will be presented by former Archives ISG leader, Albin Wagner. The session is scheduled for Monday, October 18, from 4:00 p.m. to 5:15 p.m.

Wagner is a Certified Archivist (CA), as well as a Certified Records Manager (CRM). He is a former faculty member of the Master of Archival Studies (MAS) program in the School of Library, Archival and Information Studies at the University of British Columbia. He has held a wide variety of archival and records management positions, including starting archives for the City of Providence, Rhode Island.

The session will feature the draft of the Archives ISG's new Archives Tool Kit. This session promises to provide attendees a valuable introduction to archives and preservation of historical records for records managers.

### Early Intervention: Using Records Management to Transform the Archives Process

The SAA Records Management Roundtable presented a session at the 1998 SAA Annual Meeting on the integral functions of the Archivist and Records Manager.

#### Summary of Presentations

By Sarah A. Polirer, CA, CRM, Archivist, New York State Unified Court System,  
Moderator

### Archives and Records Management: It's Not Just About History Anymore. Why Archivists Should Also Be Records Managers

Duncan O. McCollum, Jefferson County, Colorado

Duncan McCollum's presentation discussed the universality of records. He emphasized the commonality of the skills needed by both records managers and archivists. These skills involve the underlying concept of the "life cycle of records". Archivists usually get into the process after the disposition phase of the records retention schedule. They must appraise the historic value of the remaining records often after the files are disorganized and damaged. He emphasized the importance of archivists participating in an organization's initial records scheduling phase to ensure that the records are handled correctly, and that file structures are maintained. Additionally, such early intervention will reduce the costs of arrangement and description at the end of a records life cycle.

Electronic records is another area where the skills and interoffice communication between

the archivist and records manager can be alliance building. Records managers are concerned with the ability to locate, retrieve and distribute electronic documents quickly and efficiently. Yet, the very nature of electronic records makes them an unstable medium. Technology advances may make files obsolescent and plans are needed for the migration of permanent historic records before the records are purged. Good electronic records management insures that the organization will not be faced with a large quantity of historical records with outdated media in unreadable formats.

Archivists and records managers both apply appraisal, arrangement and description, legal research, collection control, and some forms of paper conversion to their work (e.g. microforms and digitization). The Records Manager's retention period is permanent for the archivist -- whether paper or some other form. The base line information for the records inventory, employs the archival skills of arrangement and description. The survey identifies the contents, purpose and physical organization of the records which are the first steps in archival processing. Gathering information about records whether to schedule them or process them also involve identifying their functions, formats, dates, quantities and relationships to other records. The archivist while writing administrative histories usually does legal research. This is the same type of research done by the records manager to determine statutory or regulator retention requirements. Collection control is keeping track of your collection. Here records managers have created records centers for inactive records, controlling their collections with storage locations and tracking precision to allow "efficient retrieval from storage on demand." Both professionals follow the same ANSI standards for non-paper preservation mediums.

In summary, combining records management and archives programs make sense because records management is an efficiency-based program with bottom line measurable efficiencies: space saved, reduced retrieval times, and reduced cost for litigation discovery. These cost savings can be selling points for top management. The archives program benefits are less tangible: public relations, "corporate memory", and historical interests. Including the archives component in records management can partially pay for these less tangible benefits.

A combined program improves communication and efficiency. Records Managers should understand the potential of permanent retention and the research value to records. Archivists should understand the records managers' priorities for efficiency of access and maintenance of records. Retention periods are based on maintaining records only as long as justified or required. Their mandate is prompt authorized destruction of obsolete records or conversion of records to more efficient formats in order to meet user's needs.

Archivist and Records Managers both participating in the "life cycle" of the record ensures that the right records make it to the Archives.

Organization Change Agent: The Expanding Role of the Archivist/Records Managers in the Information Continuum

John J. (Jac) Treanor, CA, CRM, Archdiocese of Chicago

Jac's case study of directing organizational change in the Archdiocese of Chicago was

prompted by a need to address multiple technology problems in the current computer systems and management: 1) legacy systems, 2) proprietary code, 3) not year 2000 compliant, 4) no long range plan, 5) outdated infrastructure, 6) and location of MIS department in Finance Department. Basically MIS took the position of "fixing" what was wrong by rewriting existing software code and not addressing planning issues. Jac's perspective or Archives/ Records Management perspective was to, "Do the right thing". This included exploring a broad range of solutions, getting an outside perspective, and assigning a dollar value after determining what needed to be done.

Jac found himself in the position of being the organizational change agent and we all know how much everyone loves change! Jac's key point was "Understand your organization". To direct organizational change one must understand the organizational culture and its changing technologies. Knowing the technology trends and uses, the existing and future needs of your organization, and the players involved will help the archivist /records manager become the change agent in the evolution of the new technologies implemented. Once it was agreed that change was needed, an outside consultant was brought in to objectively analyze the problems. Specifically, Jac helped create an external Information Advisory Committee to work with an internal Informational Technology Management Committee. Together they formed working groups to address the problems.

From these groups, a RFP for consultation was written. Jac co-chaired the long-range planning team and helped establish the priorities and the scope of the project. The outside consultant, in addition to the above issues, identified the following: lack of vision and plan, limited training opportunities and discrete islands of information and technology.

The solutions were to develop 1) an adaptable long range strategy, 2) prioritize short term objectives, 3) identify realistic cost estimates, 4) re-educate upper management and 5) re-organize the way information systems were managed and directed. Jac positioned himself as the facilitator of the committee and was able to address the records issues. Solutions were tied to the mission of the Archdiocese: support of evangelization, stewardship and learning.

Jac's placement on the committee was not because he was a technology wiz. Rather, what is needed is a broad knowledge base about trends in technology, and a general idea of what systems do and what applications would enhance the organization's mission. Knowing the lingo also helps. What local resources are available and where to obtain possible additional and/or outside funding will bolster your program. The most important quality is to have "good people skills" so you can bring together people from diverse areas into a working group. The key in acting as an organizational change agent is to understand your organizational culture: your organization's perception of itself, how business is conducted, who the people are that need to be brought in on the project, the stated and unstated missions of the organization, what the interrelationships (both people and departments) in the organization are, and who the decision makers are.

Finally, you must have a little chutzpah [Those not from the New York City area - chutzpah means nerve/guts]. To take calculated risks, not be afraid to speak up, and not be afraid of technology which is nothing more than the devices to create, store, process and report



information. Above all, realize managing information is our job, not MIS or IT.

Just When You Thought You Knew Your Job ...

By Melissa Dederer

Just when you thought you knew your job, along come two wonderful speakers to let us know that there is more to records management than just managing records! Ira Galtman, American Express Archivist, and Lauren Barnes, American Express Corporate Records Manager, presented "Getting in Touch with Your Inner Archivist" at our monthly ARMA chapter meeting at the Princeton Club on November 19th. As always, our chapter continued to show support by having a tremendous turnout (more than 50 attendees!).

Mr. Galtman began the presentation by giving us an overview of the history of American Express. It started in 1850 as a merger between three rival express companies. The express business consisted of shipping gold, cash, and other goods (such as chickens, plums, lottery tickets, alligators and corpses!). In 1915, they started the travel business, which incorporated the now well-known Travelers Cheques, which they had "invented" in 1891. It wasn't until 1958 that the charge card was started. The first cards were of paper and colored purple (to match the Travelers Cheques) and they charged an annual fee of \$6. As of today, Mr. Galtman mentioned, they still have approximately 24,000 original members!

American Express' corporate archives (700-1000 cubic feet) consist of board and executive committee minutes, financial records, product samples, advertising and promotional material, among other things. Mr. Galtman mentioned that these items can be acquired in many different ways. For example, he receives things from executives who leave the company, from contacts in key departments and from some tenured employees. He also purchases items from collectors. In addition, the records retention schedule ensures that many items will be coming his way.

With all this material coming in, how does an archivist determine what should be kept? Some of the criteria Mr. Galtman uses are: is it original material? Does it supplement existing documentation of the company's history? Is it information that is unlikely to exist in other archival records?

Ms. Barnes continued the presentation by giving us an overview of the current world of American Express. They have, as she stated, "hundreds (or maybe hundreds of hundreds"!) of offices throughout the world, covering a variety of business areas, including travel and financial services. So where does one begin to capture the historical records? First, know the scope of your institution, that is, know its products and services, its age and historical milestones, its organizational structure as well as its business locations and geographic range. You must also know the development of your records management program. The records manager can then capture the historical records through the use of retention

schedules, by training employees, and by targeting functions and locations.

Ms. Barnes concluded the presentation by letting us all know that we must get in touch with our inner archivist – so that (for one example) records of potential historical significance can be found. And remember that there are tools (that are our friends) that you can use (such as retention schedules). Sooo...get in touch with your inner archivist! You'll be surprised at what you find.

Melissa Dederer, MDY Advanced Technologies, Fairlawn, NJ

In the News

SAA/ARMA Sessions

PROGRAM IDEAS SOUGHT FOR 2000

The Archives ISG and the Records Management Roundtable plan to sponsor programs at the annual meetings of ARMA and SAA in 2000. Please contact Randy Jones or Gillian Hill if you have some proposals or want to work on developing ideas for programs.

SAA Web Site

ROUNDTABLE NOW HAS HOME PAGE ON WEB SITE

Thanks to the efforts of Ed Galvin, the SAA Records Management Roundtable now has a home page on SAA's web site.

Its URL is: <http://sumweb.syr.edu/archives/saarmrt/>

Please take a moment to take a look at it. If you have any comments, please forward them to me. My e-mail address is:  
randy.jones@mcmail.vanderbilt.edu

However, I want you to join me in extending our gratitude to Ed for creating and supporting this web page. I believe this is going to further our efforts to get our message out about the coalition of records management and archives. Bravo, Ed!

Randy Jones

SAA Annual Meeting

ROUNDTABLE TO MEET IN PITTSBURGH

The Records Management Roundtable will meet during the SAA's annual conference in Pittsburgh. It is schedule for Saturday, August 28, from 8:45 to 10:15 am.

The Roundtable session will include an hour-long panel discussion concerning revenue-generating opportunities for archives and records management programs, moderated by former Archives ISG leader Albin Wagner CA CRM

We encourage all RMRT members to attend. ?

#### Archives ISG

#### ARMA International Education Group Plans Active Year

The Education Group in ARMA, composed of the Archives ISG, Educators ISG, and Educational Institutions ISG, is laying plans for a very active year.

The Education Group will be working on several important joint projects this year, including a Directory of Archives and Records Management Degree Programs and Courses on the Internet, an Archives Tool Kit for Records and Information Managers, and Education Group and ISG home pages on the ARMA International web site.

The ISGs also plan to reach out to other archives groups this year, including the Association of Canadian Archivists (ACA).

#### State of New Jersey Records Storage Standards Set

Rules for the storage of public records for all state and local government agencies in the state of New Jersey were recently adopted as part of the New Jersey Administrative Code. The rule, N.J.A.C. 15:3-6, Storage of Public Records, establishes standards for storage of public records on all types of media, including electronic records.

The rule incorporates a wide range of national and international standards for storage and management of records media by various standards-setting agencies, including standards for archives and records storage facilities, temperature and humidity requirements and guidelines for storage and care for various media.

The rule was promulgated by the New Jersey Department of State, Division of Archives and Records Management (DARM) and the State Records Committee, in part, as a result of requirements in recently adopted regulations for image processing systems (N.J.A.C. 15:3-4 and 15:3-5) for these entities to establish policies and procedures for storage of backup copies of public records on optical disks or other electronic media.

A copy of the standards is will be mailed free to SAA Records Management Roundtable and ARMA Archives ISG members upon request, courtesy of the New Jersey Department of State.

For a free copy or more information contact:

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Wanted: Contributors - and an Editor  
By David Horn and Shari Laist

The editors of GRIST urge you to write about the theory and practice of our work in archives administration and records management. The purpose of both the SAA Roundtable and the ARMA ISG is to help people who handle information in any or all phases. You may write about your work or may ask questions about records or archives. The cumulative expertise of the members of these two groups is extensive over a very wide range of functions within our allied professions, so there will certainly be someone reading this newsletter who can shed light on any aspect of our work.

David Horn, who has been an editor for the first two issues of GRIST, will end as soon as a replacement can be found. Please contact Gillian Hill and/or Randy Jones if you are interested, or be ready to raise your hand enthusiastically at one of the meetings in Pittsburgh or Cincinnati.

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#### Upcoming Events

SAA Records Management Roundtable Annual Meeting  
Society of American Archivists Annual Meeting, Pittsburgh, PA  
Sat., Aug. 28, 1999, 8:45 - 10:15 am

Archives ISG Annual Meeting  
Association of Records Managers and Administrators (ARMA) International Annual  
Conference, Cincinnati, OH  
Sun., Oct. 17, 1999, 8:00 am - Noon

ARMA ISG Mid-Year Seminar  
Association of Records Managers and Administrators International (ARMA), ISG Mid-Year  
Seminar,  
National Archives and Records Administration (NARA), Archives II, College Park, MD  
Tuesday and Wednesday, April 4-5, 2000

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[Standard ARMA International disclaimers for any publication by the Archives ISG. --  
Editors]

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