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and
The Records Management Round Table of the Society of American
Archivists

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Collaboration and Building Partnerships:
Examining the Potential for Inter-organizational Cooperation
Christine Ardern, CRM, FAI

Good morning everyone. It is a pleasure to be here speaking with you
today on the topic of Collaboration and Building Partnerships:
Examining the Potential for Inter-organizational Cooperation. I am
delighted to be able to participate on the panel with Lee Stout, current
President of the Society of American Archivist and Frank Boles, the
current MAC President. I guess if we can make it through the
introductions we'll be able to say that we are collaborating – a past
president and two presidents giving their opinions! Seriously, though,
it is a pleasure for me to be here to speak to you and I thank the
program committee and in particular Nancy Kunde for the invitation.

I have been involved in archives and records management since 1975

when I was working at the Toronto Harbor Commission and was asked by the then General Manager if I was interested in starting the archives program. With a degree in French Literature and little knowledge of archives, I quickly got involved with the Toronto Area Archivists Group and found myself as Treasurer in 1975. That year, the ARMA International conference was in Toronto, so I took advantage of the opportunity to participate in that conference – the innocent abroad! The next year I found myself in the role as President of TAAG. That same year, 1976, I discovered that the SAA was meeting in Washington, as was the ICA. So my personal collaboration began very quickly in the process through my introduction to ARMA, SAA and ICA.

My professional background took me from the Toronto Harbor Commission in 1980 to the Salvation Army, Canada and Bermuda Territory. There my responsibilities included the development of a Heritage Centre facility to incorporate a museum, archives and library program. I did not have responsibility for the library function but very quickly discovered a need to join the Ontario Museum Association to network and learn. From the Salvation Army, I moved to the Art Gallery of Ontario, again into archives and records management. In 1989 I moved to CIBC to establish its archives and records management program. In each position if have had responsibility for, there has been more than one functional area in which I have been involved. In addition, I have had either volunteer staff with little expertise or a small staff where it has been necessary to be generalists. Never, in all the years I have been in the profession have I been either an archivist or a records manager. I have had to participate in at least two professions.

As a result of this dual role, for want of a better word, I have seen the similar issues come in both communities, I have seen the benefits in understanding one another and have felt that if we collaborated more, instead of fighting for turf, the strength in numbers would benefit us all, in addition to helping us share resources and avoid duplication of effort.

I will focus on four collaborative ventures that I think of interest specifically to you today, SAA/ARMA joint committee; CIMA; ALARM and the ICA/ARMA Accord. But let me explain what made me so committed to collaboration…..not competition.

In 1977, in my second year as President of the Toronto Chapter of ARMA, we discovered that there were over 20 different associations in the city dealing with some type of information management, for

want of a better word.

These included WPS, DPMA, CASLIS, ARMA, SLA, FMMA, TAAG, CIPS and a number of others. We established the Toronto Council of Information Organizations. What was the point? Well we discovered in our conversations, that we had a lot of issues in common and felt that our members would benefit from hearing what the other organizations had to say. Why, because we recognized that there were overlaps. We started exchanging newsletters and sharing information about events. For about three years we held an annual dinner that was attended by about 800 people – talk about power – and the members interacting. We had a number of joint workshops and educational seminars and found that our members benefited from the interaction and exchanges

As the executive members changed, so did some of the perspectives on collaboration and unfortunately the initiative floundered. Interestingly enough, however, ARMA Canada, at the region level, is currently renegotiating letters of understanding with a number of the same groups, such as ACA, CLA, BFMA and CIPS, to work on conferences and exchange newsletters. Plus ca change, plus c'est la meme chose!

ARMA/SAA Joint Committee

The first recollection I have of this committee is in the early 1990's sitting in the President's suite at an ARMA conference, with three representatives from SAA and three from ARMA, myself as one of them, discussing the potential for a joint committee. We worked through a number of issues and talked about the potential role of such a committee, who should be on it, what it would hope to achieve, etc. We were all very enthusiastic and were each to go back to our respective associations, to get their boards to approve what we were proposing. Imagine the deflation when the then ARMA President asked us…… "Why should records managers be interested in what archivists are doing?" Now, some of you will smile at that and say "typical". Let's just say that SAA's Board of Directors has passed similar comments in recent years so we still have the same challenges.

After two or three years, the idea was floated again and I am happy to say that the committee continues its work today. I would like to thank all those who worked hard to see that committee develop. I am aware of at least three who are here at this meeting: Nancy Kunde and Jack Treanor and Richard Cox. The committee has been successful in developing sessions which have been presented at each ARMA and

SAA conference for at least the past 5 years. While it has sometimes been a case of the President intervening to make sure that the sessions are on the program, those who have participated have found the information exchange to be very worthwhile.

It is interesting to note that those who question such collaborative efforts often have not had to work in both environments or have not come from one background and been exposed to the other area.
I began with responsibility for archives but very quickly discovered that in the types of organizations I worked in, I had to encourage records management otherwise my job would be impossible and I would not be able to protect the archival materials from destruction in the offices.

So the SAA/ARMA joint committee continues today. It seems that from time to time, the boards question its value but I think personally, it is short-sighted not the recognize the benefit of such partnerships.

CIMA: The Collaborative of Information Management Associations: What is it and what is it doing?

In 1997, Ken Hopkins formally submitted a motion to the Board of Directors of ARMA International, requesting funds to support an initial meeting of associations involved in areas that complement records and information management, to determine if there were common issues we were dealing with. The first meeting took place in Washington DC in March 1998. Over 10 associations attended the meeting, each involved in some aspect of "information management". They included AHIMA; AIIM; ARMA; BFMA; ICRM; ICA; IIMC; NARA; NAGARA; NIRMA; PRISM; SLA; SAA and Xplor.

So what happened? First of all, everyone walked into the meeting wondering why ARMA was doing this…..what was the motivation? Were they trying to take over all the other groups? Suspicions all over the place! Could ARMA really be that willing to be collaborative? We had brought in a facilitator to work with us through the process of determining whether or not we did, in fact, have an common interests and issues. Over a two-day period we met in general sessions and broke into small working groups to look at the current environment and what was happening within each association. We asked a number of questions

· In the context of serving our members, what are some of the practical assumptions we can make about the "RIM" environment in which we operate?
· In the context of providing services to our members, what are the

current and emerging trends that will shape our future; affect our level of activity and affect our ability to perform?

· What are the areas in which we need to excel together if we are to win with our members?

· What are some of the criteria for working together/collaborating….for the ultimate benefit of our members?

· In thinking about the future of "RIM" and cooperation/collaborating for the mutual benefit of all our members, what are some of the issues and challenges that come to mind?

Some pretty basic questions when you think about what each association's mission is. Each of the questions led to a series of answers. Perhaps the most telling element of the first exercise that despite the different areas each of the associations represented, the challenges were the same:

· Changes in technology are affecting all of us
· People don't want to join the associations any longer
· Younger people are not joining the associations
· Members are being downsized, outsourced
· Less time is available for participation/volunteering
· We have to think differently about how we deliver services

Remember, these are the consolidated responses from 15 different associations. Is this much different for MAC?

Out of all the brainstorming and questioning, we identified six strategic areas and some accompanying key statements which showed how we would measure success in each of the six areas. Without going into detail about those areas, I would be happy to share with you the outcome of those discussions.

We've had several meetings since that first one. Several organizations have joined and several have left. There continues to be a core group which is working together to "leverage the power". Initially, people wanted to see "products".

What is the outcome of the collaboration so far? There was lots of enthusiasm at the meetings but no funds for staff or projects, so everything is voluntary. So over time, we have concluded that until the concept is more established, we are a clearinghouse and networking group. We have a web-site designed to act as a link to the CIMA members associations, so that our members can learn what other groups are doing. We are sharing publications between executive directors and committee representatives. Collaboration at conferences is possible through exchanges in booth space; joint

chapter or local meetings; speakers participating in other associations seminars, etc.

We have also identified four key areas in which we are all interested at various levels:

· Standards development and input
· Advocacy and public relations
· Competencies
· Electronic records

Each area has a representative from the group who acts as the coordinator/chair to act as a clearinghouse and disseminate information. We are using the collaboration process to more effectively widen exposure to issues such as the CIO and PRA legislation at the Federal level. At our meeting in Dallas last August, a representative from OMB presented information on the status of both pieces of legislation. While some groups were unaware of the legislation, the presentation raised their awareness and the CIMA reps agreed that they would work together to put together a response to the legislation.
Having said that, there has been a lot of discussion about what if CIMA's position is different from our associations?

We have agreed that CIMA can act as a facilitator, discussion point and if it is not appropriate to put together a "CIMA" position, then at least we will know where each of the associations stands on the issues and they will be aware of other points of view.

In addition, as new ISO standards are developed, the representative on the committee will be distributing information to the CIMA representatives for further distribution to and input from their organizations. Our hope is that through the respective associations, the committees will share information about what they are doing and where applicable, will see input or comments from the members of the CIMA associations.

Will it work? I believe so if we can get out of our turf mentality. At the last meeting the current BFMA president mentioned that the incoming BFMA President lives in Ottawa. The ARMA Ottawa chapter seminar was taking place two weeks after the CIMA meeting so we arranged to have ARMA's President and the Region Director for Canada meet the BFMA president to discuss collaboration in Canada and at the International level. Would that have happened without CIMA? I don't think so. Obviously, the key is to gain trust

that someone isn't in it to take over the world!

ALARM: The Alliance of Libraries, Archives and Records Management

Interestingly enough the associations really had little to do with initiating the collaboration in this process. In 1993, the Canadian Government, through the Human Resources Development Council (HRDC) determined that there was a need to better understand the various professions across the country and help them in developing strategies to help each profession develop. Its objectives were to promote careers in the sectors, identify factors that affect each sector, identify the strengths and weaknesses within the HR development process within the sector and identify gaps.

At that time, HRDC contacted the Canadian Library Association and the Canadian Union of Public Employees to establish a human resource strategy committee to look at the future of the profession. Around the same time there was a lot of interest in the Information Highway. All of a sudden, the committee grew and to include representatives of the archives and records management communities. The first meeting was almost as interesting as the CIMA one – ARMA, ACA, BCA, CCA and 17 library associations! You think archivists and records managers don't get along? Try getting in a room with 17 different library groups that all have their own agendas! It makes us look like best friends!

Over time, HRDC determined that having a 35-member committee really wasn't in the best interests of the process and we were spending too much money on travel, so the size of the committee was reduced to about 12 people representing the various groups.

Interestingly enough, in our early stages of ALARM as in CIMA, we identified the trends that were affecting the various associations. Despite the fact that we had so many diverse groups, the answers were very similar:

· Economic trends are forcing restructuring of information services
· Technologies are changing the ways that information is created, stored, accessed and preserved
· The regulatory environment may have an impact on what we do and how it is done: e-commerce, government on line, e-everything.

I should point out that the process was funded 50% by HRDC and 50% by the associations, whose contributions were both financial and in time contributions.

The project has been undertaken in a series of phases, mainly because of the HRDC changing policies and funding requirements and general government processes!

In Phase I we identified key areas required to support the development of what became information resource management professionals. Once again, the terminology caused some "angst" because it didn't specifically represent what each group does. But we did manage to overcome that in favor of looking at the big picture and developing a vision.

In Phase I, we determined that by 2005 the professions would have changed:

· No functional separation
· New job titles
· Integrated programs
· We would be information facilitators
· Alliances across public institutions
· We would be corporate information specialists.

In Phase II we validated the findings in Phase I by hosting a series of focus groups. The results of the focus group meetings were consolidated into a strategy document, which outlined the types of areas that needed additional support and how groups might partner to further the professional development of those currently in the workplace. Two key issues were identified: those contacted felt they had access to training to update their technical skills but they were not exposed to business skills, either at the graduate level or through association training program and therefore they felt lacking in these areas.

We are currently in Phase III of the project. We have developed a competency profile document which addresses, at the high level, some of the key areas that the three sectors have to be involved with. We brought together representatives from the three sectors, and from different organizations within those sectors. For nine days in total, over three separate weekends, we worked with the assistance of a DACUM facilitator to describe our actual job functions and the activities we undertake to complete those functions. Once we had completed the profile document, it was circulated to the various associations through those who had participated in the process and joint presentations were held at the annual conferences to discuss the content. Having made sure that the documentation was widely distributed for comment and having consolidated the comments into the profile document, we are now continuing to work on the next

phase.

We are currently developing a "tool kit" which will help show our members how to use the competency profile for self-assessment, defining learning gaps, developing job descriptions/classifications and identifying training needs.

All the information about the various phases is available on two websites:

ALARM: Early Project Reports
http://www.fis.utoronto.ca/people/affiliated/alarm/whatnew.htm

Cultural Human Resource Council: Competency Profile
http://www.culturalhrc.ca/english/document/alarmcomp_e.pdf

Has it been easy? No. The same challenges that we had with CIMA exist here. Why? Because we are human beings and naturally suspicious. Some groups felt it was inappropriate for this group to be developing competency profiles. Apparently this is quite common because the university professors, in all sectors, feel that they should be defining the profession, rather than the practitioners. They didn't provide comments on the documentation; they just said it wasn't the appropriate group to be doing it. So does that type of attitude benefit the profession?

In any of these efforts, communication is key to ensuring that everyone involved is kept in the loop. What is disturbing to me is that there was nothing there in the first place, so rather than be critical, become part of the solution and help and let's get something out there that will be useful. The document will be constantly changing but at least there is a document to be used as a base from which to grow.

ARMA/ICA

One of my roles in ARMA International before I became President was Region Director for the International Region. As International Director, I was responsible for working with our members overseas and addressing questions related to records management. I should also point out that in my past life, I was a member of the ICA's program committee for the 1992 Montreal conference and as a result, had worked closely with the ICA process since 1988. In 1988 we were in an era of competition. I am pleased to say that now, in 2001, after a lot of effort, we are now partners with ICA. Why? Because once again we are facing the same issues: people want help with

training and resources.

ARMA continues to be asked to provide training seminars and publications internationally. We know there is a huge need for records management in Europe, Asia and Latin America. Can ARMA address every request? No. Can ICA? No. So why not look at what each group is doing and see how we can work together to maximize our resources instead of competing? Why duplicate activities? Our electronic records committees have been working together. Members of ICA and ARMA are represented on the ISO Records Management standards development committee. We are sharing information on our education initiatives and looking at ways in which we can work together to make better use of our limited resources and reach a wider audience.
But Can We Do It?

Now all this collaboration sounds very rosy. Ultimately, though reality sets in. While there are plenty of opportunities, there are many, if not more challenges. If we agree that we will do joint projects to whom are those that don't follow through, accountable? Who is responsible for monitoring the activities? How does the umbrella group ensure that their boards maintain the same level of enthusiasm for the collaboration that they have. After all they aren't in the room with all the energy but they are the ones who have to fund the meetings and prioritize them in relation to other activities the associations are embarking on.

Continuity is a major issue in such processes so that all the participants are at the same level of understanding and trust with each other

Communication back to the respective organizations is critical as is communication to the members of the associations. If not, then rumors start and people start to misunderstand the intent. In addition the group then takes of a life of its own and is perceived to be separate from, rather than representing the interests of its associations.

My thoughts on collaboration? Why can't we accommodate different points of view and see that they are all part of the same puzzle but just a different approach. The whole is, after all, the sum of its parts. Ultimately, we have to work together to ensure a strong future and use our energy positively. We can argue about terminology but does that really move the profession forward and outside our own little worlds? We can't participate because we don't like the term information management. Are we dealing with a life cycle or

continuum? Are records evidence or corporate memory? While we are focusing on these intellectual arguments, programs are being shut down and staff are being outsourced.

I recently attended a Steven Covey seminar on First Things First. There was an accompanying video in which he was discussing paradigm shifts. He was showing how we typically try to address the issue of time management in our lives and demonstrated how, by thinking differently, we can achieve a lot more and be far more effective. That's where we are today. We have an opportunity to work together if we can just get out of some of our old paradigms and trust that we all are heading in the same direction. There is enough to do for all of us and the more we collaborate, share resources and share our collective knowledge, the stronger we will be as professionals. Our tag line for CIMA says, "Leverage the power"! Let's think about how we can work together more closely to do that. I believe we can but then maybe I see the glass as half full!

SAA/ARMA Joint Committee Meeting Minutes for August 30, 2000

I. Opening Remarks
Attending were: Randy Jones, Albin Wagner (for Gillian Hill), Diane Carlisle, David Gracy, Edward Rider, Wilda Willis for Susan Fox, Nancy Kunde (Guest). Absent were: Byran Corbett, Richard Cox, Virginia Krumholz

II. Review of Minutes and Approval of Agenda
Minutes and Agenda were reviewed and approved without objection

III. Old Business
1. Guidelines for Retention by Industry Project (GRIP) ARMA ISG Records Retention Scheduling Project - Diane Carlisle
These guidelines will be loaded on ARMA web sites by ARMA Conference (October 22,2000). There will be a general section with principles for developing a retention schedule, sample formats, and online links to information about retention schedule development. The next section will be industry specific with industry profiles, standards and guidelines, links to regulating agencies, and a bibliography of retention guidelines specific to that industry. The third section will be a matrix with records series titles descriptions and comments. SAA input will be important for archival appraisal. Actual retention periods will not be included but will point to sources to help make that determination such as NARA's General Retention Schedule.

The Business Archives Section can also help to identify archival records in the matrix
Actions: Ed Rider will work on getting POC's for comment from the Business Section of SAA. These will be individuals who can review records series and identify records of archival value. The Archives/Records management Roundtable should be notified when the sites are up so that they can view and provide comment as well. However, it is important to remember that input from the people Ed gets to comment should be done before release on the web.

2. ISO Records Management Standards - Diane Carlisle

There is a subcommittee working on the ISO Standard on records management. The subcommittee has decided to split their work into two parts. One part will be a technical report that will closely adhere to the existing draft. The other part will be a draft standard that will be a little more general. This will facilitate translation into other languages so those member nations can review and approve the standard. It was deemed desirable to consolidate ARMA and SAA comment.

Actions:

Randy will see if Lisa Webber will take the lead with SAA to coordinate our comments to Diane.
Randy will get volunteers from the Records Management Roundtable to provide additional backup to Lisa.
Randy will go to standards Committee (Kris Kriesling) to see how they want to be involved.
Diane will notify SAA members for comment and when the deadline for comment is.

3. CA/CRM Exam Proctors ? David Gracy
Both groups in favor of sharing proctors. The two groups need to meet to proceed further with plans.

4. Program Agenda Deadline and Slot for SAA/ARMA Jointly Sponsored Session - Randy Jones
The Joint Committee had recommended ARMA and SAA to reserve a slot in the program agenda for a joint committee sponsored session proposal. ARMA had concurred with the Joint Committee's recommendation but SAA's Council did not. They felt that it may limit the quality of sessions and SAA had a similar joint relationship with ALA but had not reached this kind arrangement with them and did not want to establish such a precedent.

The feelings from the Committee were that SAA should honor its commitment to the Joint Committee's mission and purpose by keeping open a slot. Also, there was concern that this would send the wrong message to ARMA about SAA 's commitment to collaboration and cooperation.

Another problem was that the deadlines of both program committees did not facilitate member wide participation from both the Archives ISG and the Records Management Roundtable because while the Roundtable could meet and brainstorm ideas the ISG did not meet until after submission deadlines. It was deemed important to have grassroots input from both groups in order to create the best proposals. '

The program chair for SAA, Karen Benedict, had agreed prior to the meeting, that she would let their deadline slip in order to facilitate the proposal submissions. Agreement was reached that if we submitted 3 quality proposals that ARMA would probably waive their deadline as well.

Actions:

Randy needs to resubmit this proposal to Council to review their decision and get concurrence with this compromise.

Diane needs to confirm that this proposal will fly with ARMA as well.

5. SAA Booth at ARMA Conference - Announcement

Ed Rider will take charge of setting up the booth and staffing it.

IV. New Business

1. SAA Update - Willis
Adam's Mark hotel issue has been resolved with SAA. The Council passed a resolution supporting the Organization of American Historians on their stance with Adam's Mark. Attendance at the Denver conference was approximately 1000 which was higher than the Pittsburgh conference

2. ARMA Update - Diane Carlisle
Thomas Kallapolis will be the keynote speaker at the ARMA conference in Las Vegas in October. ARMA has a new Public Affairs Director - Bob Tillman.

3. Proposals for SAA/ARMA Jointly Sponsored Sessions - Randy
Jones

Bryan Corbett - Outsourcing Archival and Records Management
Services. This idea evolved into how to manage arrangements with
commercial vendors to include writing and managing contracts,
doing RFP's, etc. There was a session done at the conference on
outsourcing archival sources. This session may even include
decisions to making your organization a service provider as well.

Albin Wagner - Archival & Records Center Storage Standards - What
are the arguments for and against - Legal Liabilities

Nancy Kunde/Randy Jones - Scheduling and Using Websites in
Records Management and Archival Programs - Managing the
website. How can we develop utility barometers and prove value.
What has been learned from putting sites up on the web? Has the site
proven to be useful as an Intranet tool for records management use.

Actions:

Each person assigned to a topic needs to begin to put together a panel
and flesh the ideas out for submission

Randy and Gillian needs to get the ideas sent to the Archives Records
Management listserv to facilitate discussion and present it before the
Archives ISG for discussion.

4. RMAA-ASA Statement of Joint Purpose - Jones
Document was handed out and members asked to forward comments
and be prepared discuss it in old business at the ARMA conference
meeting.

5. Vision Statement - Jones/Wagner
This was never fully discussed but the idea was brought up about
asking the ARMA and SAA to endorse in principal conferences that
would dovetail each other in the same city possibly with one
overlapping day.

Randy Jones
Chair
ARMA/SAA Joint Committee

SAA Records Management Roundtable Annual Meeting Summary
Society of American Archivists Annual Meeting, Denver, CO
Sat., Sept. 2, 2000, 8:00 - 9:30 am

Summaries of Diversified Approaches to Records Management
Training

1. Peter Schinkel - Retention Schedule Program Manager (retired) -
Georgia Dept. of Archives and History.

Recommended building on models already available. He gave web
address and contacts for organizations in the Southeast. They include:

Florida Records Management Association: hosts low-cost and free
workshops - www.frma.org
Georgia Records Management Association - www.graweb.org
South Carolina Records Management Association - www.scpra.org
National organizations that can be helpful are:
National Forum on Archival Continuing Education -
www.coshrc.org/nface/index.html
Technical Bulletins from NAGARA - free to download at :
www.nagara.org/rmbulletins/bulletins _toc.html

2. Nancy Kunde: Records Officer, University of Wisconsin-
Madison.

Reported that the Archives and Records Management Service
(ARMS) is a special library within the general library system of the
University. There are 6 staff total in the Archives and Records
Management Services with 1 ½ staff dedicated to records
management. With limited staff, training is essential. It allows for:
placing responsibility back on creating office; addressing the fact that
record keeping is no longer an easy task; recognizing that some
records may never reach the campus archives; and obtaining active
participation in the records program. Records management training is
also viewed as a way to begin building a working partnerships for
managing electronic records.

Their training vehicles include: Forums; workshops; seminars;
brochures; web site; and noon-time brown bag discussion. Topics
include tours; open houses; basic records management (filing, etc),
retention schedules; offsite storage; records liaisons; and and e-mail
management.

Nancy stressed collaborative efforts. They held an e-mail forum with
the campus attorney, internet security officer, archivist, and records

management staff. They also partnered with the Library Automation Staff to go "on the road" with a presentation on e-mail software training and management and did a workshop for Campus Tech Partners (LAN Administrators, IT specialists). Positive outcomes of collaboration include: being able to build a records management training component into the campus' web distance learning program; greater awareness of records management issues; and making the archives and records management program more visible to the campus community. Archives and records management training is publicized through the campus Professional Development Office which has afforded greater visibility for the ARMS training programs.

Lessons learned include: all audiences (even those of just computer staff) will have varying levels of technical expertise; don't assume everyone has the same knowledge; target material to audience; don't abandon traditional topics such as filing; training does not have to be formal to be effective; and training and educational programs are time consuming to prepare for, so take advantage of ways to publicize them.

Collaborative efforts have opened the door to other possible training projects. Even if nothing comes of the proposed efforts, ARMS has gained valuable allies in the information management arena on campus. They represent valuable resources to tap in developing the campus' electronic
records management strategy.

The ARMS web site is
http://www.library.wisc.edu/libraries/Archives/

3. Whitney Miller, University Records Archivist, Michigan State University

Michigan State University is not required to follow state retention schedules but is allowed to create its own records management policies. While there are advantages to not following the state system, it is difficult to implement uniform standards across the campus. They need records management training because of staff turnover, non-compliance by departments or offices, and changes in the RM program. They have found that training is needed at all levels of administration.

Coalitions are the cornerstone of their work-with administrators to set policy and assure compliance, IT for electronic records and office

staff who handle the records.

They have found that basic records training requires personal contact, even one-on-one or departmental level workshops. They try to get across concepts as well as practices - making staff aware not just about storage but about information management. For example, they present the concept of being records creators vs. records recipients and only submitting what they have created.

It is still necessary to review records scheduled for destruction, they may overlook records that should be kept. Training Suggestions: Take advantage of available technologies; use appropriate training (if dealing with electronic records; workshop participants need access to computers during training); be aware that not everyone may have web access; and use interactive forms where possible

Formats used: Web sites; workshops; TV; Power point presentations (on web site so people can get to as needed); long-distance learning; CDs (you can produce "business card" CDs with retention schedules for each office as a way of distributing information); Newsletters; e-mail/e-bulletins; and listservs.

Training of administrators should incorporate records management concepts including legal, fiscal, and historical responsibilities. Don't assume that they know this or fully understand the benefits of records management to the company. Sending out brief information packets before meetings can be helpful and you should plan to have more than one meeting.

Goals of their records management training should include: standardizing basic records management (including general schedules); allowing for special schedules when necessary; incorporating electronic records; identifying vital records; minimizing unauthorized destruction of records; expanding participation in records management; and increasing their sphere of influence.

SAA and ARMA Meetings

SAA will hold its annual meeting in Washington D.C. August 27 - September 2, 2001
Information available on the SAA Web Site at
http://www.archivists.org

The Records Management Roundtable Meeting will be held
September 1, 2001 8:00 a.m. - 9:30 a. m.

ARMA will hold its annual meeting in Montreal, PQ September 30 -
October 3, 2001
Information available on the ARMA web site at http://expo.arma.org/

The ARMA Archives ISG will meet as a part of the Education Group
Sunday, Sept 30, 8:30 - 9:45 a.m.

SAA Records Management Round Table Session

Saturday September 1, 2001 8:00 a.m. - 9:30 a. m.

Has your organization recently assigned to you -- the archivist--
records management responsibilities? If you answered yes, then this
year's Records Management Roundtable discussion is for you. Peter
Kurilecz, CRM, CA of the Woodside Summit Group Inc., a records
and information management consulting company, will present and
discuss effective records management promotion strategies. He will
be joined by Madeleine Tolmach, of The History Associates and the
Montgomery County (MD) Archives, who will discuss her current
promotional project.

Preliminary Information Regarding ARMA and SAA Sessions

The SAA Records Management Roundtable looks forward to
continuing our efforts with ARMA and the SAA/ARMA Joint
Committee to bring Records Managers and Archivist together. Our
exchange of information, practices and techniques at the Annual
Conferences, through GRIST, and the list-serve can only help each
individual archivist and records manager improve the quality of
service we can offer our organizations. I look forward to meeting
more of you at the Conferences and see more of us getting involved
with the Round Table and the ISG. Here are a few opportunities to do
so:

Preliminary information regarding ARMA sessions:

Approaching Records and Information Management Through

Cultural Perspectives - Rachel Van Wingen, Peter Collins & Brand Hoff

Managing & Using Websites in Archives & Records Management Programs -Randy Jones, Nancy Kunde, Jack Treanor

Information Preservation: It's a Records Manager's Concern Tool - Charles Arp & Joseph C. Dickman, Jr.

Long Term Storage and Migration Requirements for Digital Records - Sharon Robertson

Replication to Accomplish Preservation of Digital Info - Jeff Rothenburg

The Digital Enemy Within: Preserving Mission-Critical Information in the Hi-Tech Age - Michael Maxwell

Planning for Disaster - Sandra Birkholz

Preliminary information regarding SAA conference: (the Conference Brochure should be in your hands as well as viewed at www.archivists.org

Archives ISG Networking Session

Association of Records Managers and Administrators (ARMA) International Annual Conference, Las Vegas, NV, Oct. 23 - 26, 2000

The networking session of the Archives ISG met on Monday morning, October 23, at 10:15 a.m. at the Las Vegas conference. There were around 35 attendees. For most, this was their first visit to the Archives ISG. They introduced themselves and their institutions, and explained their interest in archives. Many had only recently been given responsibility for archives work.

Albin Wagner, the Group Manager for the Education Group (of which the Archives ISG is a part), told the group about the Archives Toolkit he has prepared. Most of the attendees had not yet received a copy of this document and eagerly wrote their names on a sign up sheet to
obtain one.

Randy Jones then addressed the group. Randy is a recent leader of the

SAA Records Management Roundtable. He explained the work of that group. He also described the work of the SAA/ARMA Joint Committee, which he currently heads. He mentioned the new proposals for a SAA/ARMA jointly sponsored session to be given at both of the organizations' conferences next year. Three proposals have been discussed:

*Writing RFP contracts, and relationships with vendors
*Standards for records centers
*Putting archival records on the WEB (including preservation issues)

He also explained that the Joint Committee is actively working towards a contiguous conference for the SAA and ARMA as soon, as is practically possible. This would benefit both professions very much.

Gillian Hill told the group about her attendance at the National Forum for Continuing Archival Education earlier in the year, as a representative of ARMA. She explained that one of the forum's goals of providing a source for information about all archival programs held around the country by any of the allied professions, would be of great interest to Archives ISG members. People would be able to find topics of specific interest to them for which classes or symposia would be held in their own geographic region.

The floor was then opened for discussion. Most attendees were keen to discuss digitization projects. Those with some experience of recent projects offered their advice to the beginners and many names and numbers were exchanged. The benefits of networking were demonstrated.

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