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The Records Manager

The Newsletter for the Society of American Archivists



In This Issue



Welcome to the Summer 2014 issue of *The Records Manager*.

In this issue, our chair, Brad Houston, gives his Farewell Address to SAA RMRT's members.

One of our Steering Committee Members, Kate Stratton, reports on RMRT's Google Hangout where Johns Hopkins University (Christie Peterson) and University of Texas at Austin (Jessica Meyerson, Maryrose Hightower-Coyle, and Jenn Coast) talk about coordinating web-archiving-as-RM.

Lastly, we meet the members of the SAA RMRT Steering Committee for 2014-2015.

Enjoy the Summer 2014 issue of *The Records Manager*.

Lorette S. Weldon

Editor, *The Records Manager*

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Greetings to our Members . . .

Message from the Chair, Brad Houston

It's a bittersweet occasion for me—this is my last column as RMRT chair (though between Twitter, the RMRT blog, and other happenings for the newsletter, you likely haven't heard the last of me!). All in all, it's been a good run, I think. Though there are certainly a number of projects or potential projects that are not at the place I would have liked, we have made great strides in our education area. Between the collaboration with Lone Arrangers on the RM handbook, the Google Hangouts, the Schedule blog, and our upcoming RM basics webinar, I am extremely happy with how we have expanded our ability to help roundtable membership (and other interested parties) meet their records management resource needs.

Needless to say, none of this would have been even remotely possible without the herculean effort put in by the various iterations of the steering committee and you, the roundtable membership, to coordinate, facilitate, or manage these projects. "Thank you" seems to be a wholly inadequate phrase to express the extent of my gratitude, but for now it must suffice. And yet, as August 15th approaches, it occurs to me that I have been fortunate

in another way as well—the composition of the steering committee has been remarkably consistent. Sure, pretty much the entire committee lineup is different from what it was in 2011, but the changes happened gradually, rather than having the entire committee turn over at once. Under our current bylaws, which provides for every officer and member of the steering committee to have 1-year terms, this slow change was anything but guaranteed.

As such, for what will probably be my last effort as RMRT chair, I undertook an effort to amend the bylaws in such a way to ensure that the efforts of today's steering committee are not forgotten by the completely new steering committee of tomorrow. Just as we advise our own organizations to have vital records planning and continuity of operations, the changes that I am proposing will help our roundtable maintain its own continuity, and thus ensure that new members and officers have the experience of continuing members to draw upon. Besides the typographical and stylistic minor changes, the main changes to be voted on later this year are as follows:

Formalization of Vice

Chair/Chair/Immediate Past Chair succession. While the vice chair of the RMRT traditionally runs for chair (and is usually unopposed), there is nothing in the current system that says that he/she is obligated to do so. This potentially creates a situation in which a candidate wins election for chair with no sense of the history of the RMRT steering committee's activities—or worse, a situation in which nobody feels qualified/interested to run for chair. This situation last year meant I was quasi-obligated to run for one more term than I had wanted, while this year we had no vice chair candidates for (I suspect) the same reason.

Changing the function of Vice Chair to Vice Chair/Chair elect will take some of that pressure off of the organization, while also giving the VC a year to “learn the ropes” before taking over. (Hopefully this learning curve will also encourage more of our members to run for a leadership position!) The Immediate Past Chair will stay as an official Steering Committee position, but will serve as more of a President Pro Tem position, advising the current chair and representing the roundtable in the event both Chair and VC are unavailable.

Extension of Steering Committee

Terms to 3 years, and staggering election of Steering Committee members. As noted above, in theory the steering committee could turn over in its entirety in a single year, which would radically change the direction and level of experience of the steering committee. To mitigate the potential of this happening, extending the terms of the steering committee from one to three years gives members a little more time to “learn the ropes” while also providing some stability in the committee's composition.

To further facilitate a gradual change, the proposed amendments would stagger election of steering committee members so that one-third of the committee (or 2-3-2; please discuss at the annual meeting!) would be elected every year. This is the system that SAA Council uses, and it serves the same purpose as does the formalization of the VC-Chair-Past Chair progression—to let the new members get acclimated to their new duties by receiving the advice of newer ones. The staggered elections provide for periodic infusion of new blood (and, hopefully, new ideas) to the steering committee.

Provision for transition from the old system to the new one. These sections for both officers and steering committee members will necessarily expire eventually, but they are critical nonetheless to facilitate an orderly change to the new system. The provision for the vice chair transition is especially important, since that person will be appointed by the 2014-2015 steering committee, and for someone who will eventually be chair, the general RMRT membership deserves a vote. Should the proposed referendum on this person's continuation as vice chair fail, a new special election will be held; in no case will we move to the new system without having an elected vice chair in place and ready to assume the duties of chair at the next Annual Meeting.

Formalization of new officer

positions. Time marches on, and so do the roles of the officers and members of the steering committee. It seemed when the bylaws were first written that the newsletter and SAA microsite would be the main communication channels for the foreseeable future. Is this still the case? It is unclear to me, and I encourage people to chime in on the

listserv or at the Annual Meeting. In the meantime, it seems reasonable to empower the RMRT officers to appoint temporary officers to fulfill new functions, with the option to make them elected officers later. One officer position I hope we can formalize in particular is the secretary; although we do our best to get minutes of our monthly teleconferences posted on the microsite, recording of same is spotty at best, and they are not always delivered to the webmaster in a form that makes sense to members. A steering committee member specifically charged at every meeting to take notes would greatly help with this transparency initiative.

maintains the continuity it needs to become a stronger resource and advocate for SAA's records management community in the future.

Thank you again to all steering committee members and to our lovely members—literally none of what we've accomplished over the 3 years of my term as chair would have been possible without your participation and enthusiasm. I am sure that Beth Cron will be an excellent chair, and I look forward to helping with the next chapter of the RMRT's growth.



Brad Houston, RMRT Chair, 2013-2014

He blogs at

<http://saarmrt.wordpress.com/author/herodotusjr/>



Questions? Comments? Sarcasm? Criticism?

You've got about 4 days to the annual meeting to discuss as I write this, where we'll take amendments to the amendments; following that, we're looking to put these to a formal vote in October. I hope you will all take the time to review these bylaw changes and help ensure that the RMRT

Google Hangout Recap

By Kate Stratton, Assistant Archivist at Gates Archive, Seattle, WA & Steering Committee member

The Records Management and Web Archiving Roundtables hosted a joint virtual hangout in July where we discussed two great projects utilizing web archiving as a tool for records management.

On July 9, 2014, Christie Peterson, of John Hopkins University, and Jessica Meyerson, Maryrose Hightower-Coyle, and Jenn Coast from the University of Texas at Austin, shared their insights on appraisal, institutional support, and web content as vital records. To view the hangout, visit our youtube channel:

<https://www.youtube.com/watch?v=vDN1vvvW0q0>



Also, please join us after the Society of American Archivists

Annual Meeting for a virtual hangout/tweetup with the Records Management Roundtable officers and steering committee members.

can be contacted at kates@gatesarchive.com She blogs at <http://saarmrt.wordpress.com/author/mtuomala/>



You'll get to meet the new members and hear about favorite Records Management related takeaways.

Follow our blog for updates:

[http://saarmrt.wordpress.com/!](http://saarmrt.wordpress.com/)

Kate Stratton is the Assistant Archivist at Gates Archive, WA. She

The Election Results Are Here: Welcome the Steering Committee of 2014-2015

By Lorette Weldon, RMRT Newsletter Editor

Chair -- - Beth Cron



Beth Cron is a Records Policy Analyst at the National Archives and Records Administration. She is a member of the Records Management Policy Section within the Office of the Chief Records Officer. The Records Management Policy Section has produced guidance on social media records, cloud computing, and email archiving applications. Beth is a 2008 graduate of the School of Information at the University of Michigan and she specialized in Archives and Records Management. While in graduate school, she worked at the Gerald R. Ford Presidential Library and served on the board for the SAA Student Chapter. She previously worked at the Inter-university Consortium for Political and Social Research (ICPSR). She currently serves as the vice chair of the Records Management Roundtable.

The Records Management Roundtable Steering Committee has made significant strides toward building connections and sharing

knowledge between archivists and records managers. As chair of the RMRT, I would build upon the previous successes of the committee and explore new ways to meet the needs of our members. With the launch of The Schedule blog and through the use of Google Hangouts, the steering committee has improved communication with members about various records management topics. As a member of a distributed team, I regularly use the tools and technology at my disposal to bring together team members from around the country, and I would utilize this expertise to lead the RMRT. As vice chair, I led the Functional Thesaurus Working group in their development of a functional thesaurus for archivists and records managers. This electronic resource serves as a dynamic tool for users and is accessible on the Metadata Registry. As chair, I hope to continue improving the usefulness of the thesaurus while exploring other projects that will support the work of SAA members.

Steering Committee Member- Brittany Turner



She is the Records Manager/Special Projects Librarian

for the Shreve Memorial Library in Shreveport, LA. She earned an MLIS from the University of Alabama School of Library and Information Studies, and a Master's of Public Administration (MPA) from the Rockefeller College of Public Affairs and Policy at the State University of New York at Albany. Prior to working for the Shreve Memorial Library, she served as a Project Coordinator for the New York State Archives, Coordinator of the Hudson Valley Area Labor Federation, Village Clerk for the Village of New Paltz, and Special Projects Coordinator of Family Planning Advocates of New York State.

I've been very encouraged by the work the RMRT has done to sustain discussions and activity throughout the year. I am eager to help assist with those efforts, and believe them to be an area for potential growth within SAA as a whole. As a Records Manager in a public library setting, I would like work with others to identify best practices and strategies that will empower RMs and Archivists with RM responsibilities to thrive in non-traditional environments, particularly when there are few or no support staff available to assist. I am relatively new to the RMRT, and quite new to ARMA International. My work with the SAA Security RT allowed us develop stronger relationships with our colleagues in the ALA RBMS Security Committee and the Manuscript Society. I would like to

explore similar partnership opportunities between SAA RMRT and ARMA.

Steering Committee Member- Matt McClelland



He is a ECM Program Manager at Blue Cross and Blue Shield of North Carolina . As a member of the steering committee, Matt would like to help SAA and RMRT focus on emerging technologies for records management that can bridge Information security, content management and enterprise search.

I would like to support Members of SAA to support effort of bringing relevant and timely information to Business and research archivists.

Steering Committee Member- Jenny Mundy



Jenny Mundy has worked as an electronic records management analyst for Multnomah County since 2010, where she also serves as Records Officer. Prior to her current position, she worked with Oregon Historical Society, City of Portland Archives and Records Center, and University of California, Santa Barbara, Special Collections. She graduated from San Jose State in 2009 with a MLIS with an emphasis in Archives and Records Management. Her professional interests are focused on digital archives, digital preservation, accessibility of archival information and the intersection of humanity and technology.

I'd like to serve on the Records Management steering committee as a way to contribute to the professional community by representing the convergence of archives and records management. With experience in both academic and public institutions, I can represent the perspectives of various archivists whom are also working in the capacity of records manager. Additionally, my experience and perspective in working with electronic records and archives can contribute the perspective often desired in a world where information is increasingly accessed electronically.

Steering Committee Member - Matthew Farrell



Matthew Farrell is the digital records archivists for the Duke University Archives and the David M. Rubenstein Rare Book & Manuscript Library, where is responsible for the identification, acquisition, management, and delivery of born-digital records and other archival material. He earned his MLS at UNC-Chapel Hill's School of Information and Library Science. In his spare time, he likes to press the delete key.

I am interested in continuing to serve on the steering committee for the Records Management Round Table. The past year saw the development of several items of note, and I want to build upon those first steps by completing the RMRT's webinar for archivists without a clear records management background. Similarly, building upon our efforts to increase the amount of dialogue around records management issues online, I would like to see the roundtable discuss issues whose applicability to records management may not immediately apparent in a manner that advocates for records managers and records management activities.

Steering Committee Member- Christie Peterson



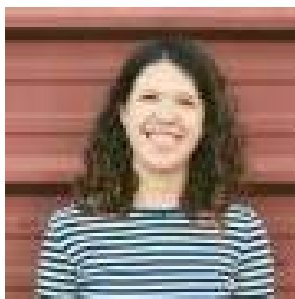
Christie Peterson has been Records Management Archivist for Johns Hopkins University's Ferdinand Hamburger Archives since September 2012. In that role, she is responsible for records management, collection development and accessioning for the university archives, as well as the acquisition, processing, preservation and delivery of born-digital materials in the university archives and manuscripts. She previously worked as an archivist in the Princeton University Archives, as a project archivist with a congressional papers collection at Bates College, and as a graduate student assistant at the Bentley Historical Library. She received her MIS from the University of Michigan. Prior to graduate school, she honed her interviewing and records review skills as an investigator for the U.S. Equal Employment Opportunity Commission.

Christie has served as a member of the RMRT Steering Committee for the last year, she was previously a member of SAA's Annual Meeting Task Force, Appointments Committee (2014) and Program Committee (2012), and she is active

in the Mid-Atlantic Regional Archives Conference (MARAC).

As a member of the Records Management Roundtable Steering Committee for the past year, I have collaborated in the creation of an upcoming webinar on Records Management, I have helped plan the upcoming annual meeting, I have taken the opportunity to [blog about records management issues I'm facing](#) at The Schedule, and I have signed up to participate in a joint RMRT/Web Archiving RT virtual hangout in the next few weeks. All of these activities are united by a desire to learn more about records management myself and to share my own knowledge and experience in turn. I think that facilitating networking and the exchange of knowledge is one of the most important things that the roundtable can do for its members, and if elected I would be honored to continue and expand that work for another year.

Steering Committee Member- Eira Tansey



Eira Tansey is the Digital Archivist/Records Manager for the University of Cincinnati. Tansey is responsible for the university's records management program, and for the planning and development of

workflows related to born-digital archives and digital preservation of electronic records. She received her MLIS from San Jose State University, and is a Certified Archivist. She has previously worked at the Louisiana Research Collection at Tulane University. Tansey was recently elected to SAA Nominating Committee, served on the SAA Communications Task Force from 2012-2013, and was the 2010-2011 Chair of the SJSU SLIS SAA student chapter.

As a relatively new records manager who has been dealing with the challenges of being a dual archivist-records manager, I have found many of the resources of the RMRT to be quite helpful in my current position. Events such as the Records Management Hangouts have been a great way to learn how records managers at other institutions are developing creative solutions and practices. I am interested in contributing to the many projects furnished by the roundtable for the benefit of our colleagues.

Newsletter Editor/Steering Committee Member- Lorette S. Weldon



Lorette S. Weldon, information professional, professor and author of *SharePoint without Coding: My Notes for Embedding the Librarian*, [Volume 1](#) and [Volume 2](#), and [Librarians using SharePoint](#), obtained her MLS from University of Maryland. She has articles in

Computers in Libraries, Information Outlook, Association of Governing Boards of Universities and Colleges' Trusteeship. She has been a speaker at the Special Libraries Association 2009, Computers in Libraries 2009 and 2010 Conferences.

Lorette has been Webinar Instructor and Board Professionals Newsletter editor for Association of Governing Boards of Universities and Colleges, The Records Manager Newsletter editor and Webmaster for the Society of American Archivists Records Management Roundtable for four years. For two years, she was the chapter archivist for SLA's Maryland Chapter and webmaster for SLA's DC Chapter.

As a returning RMRT Newsletter Editor, I am prepared to serve the archival and records management communities on the Steering Committee by gearing the newsletter to report on matters placed before the roundtable by the SAA Council and staff. Through four years in this position, I have been working in making a newsletter that did the following: More focus on recent graduates; Articles that better demonstrate the diversity of our backgrounds; Case Studies. I would use my position within the Steering Committee to also make the newsletter marketable to lure new members and new ideas to the RMRT.

Lorette Weldon is the RMRT Newsletter Editor.





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RMRT Blog:

<http://saarmrt.wordpress.com/>

Google Hangout:

<https://plus.google.com/u/0/118358692462079747504/posts>

About Our SAA Records Management Roundtable...

The Records Management Roundtable encourages discussion of current issues in records and information management and promotes better understanding of the importance of collaborative efforts between archivists, records managers, and other information professionals. The roundtable works with SAA to promote proactive and responsible records and information management practices that benefit SAA, archival and records management institutions and professionals, consumers of records and information management services, and society as a whole through the verification of authenticity and accuracy of records.

The roundtable endorses and upholds the profession's ethical standards and guidelines, while encouraging a strong commitment to professional development of its members through continuing education; developing professional standards and practices; and educating society about records and information management. The roundtable encourages diversity, initiates discussions and training in records management technologies, and promotes public awareness of the records and information management profession and its close ties to archives management.