



**SOCIETY OF
American
Archivists**

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The Records Manager

The Newsletter for the Society of American Archivists Records
Management Roundtable

Lorette S.J. Weldon, Editor



Notes from the Chair, Michael Courtney

Greetings RMRT Members:

The Society of American Archivist Annual Meeting is fast approaching and that means it is time to discuss elections and the Records Management Roundtable business meeting. The Records Management Roundtable elections will be held on-line starting July 1. The candidates are: Brad Houston for Chair, Prisca Giordani for Vice-Chair, Lorette Weldon for Newsletter Editor/Steering Committee, Donald Post for Steering Committee, Beth Cron for Steering Committee, and Katie Nash for Steering Committee. Please read the candidates biographies and statements of interest.

The Records Management Roundtable Annual Business Meeting will be held Wednesday, August 24 from 3:15 to 5:15 pm. If you have an ideas or issues that you would like to have discussed at the business meeting, please e-mail them to me: Mikecourtney1974@yahoo.com . I am also excited to announce that our speaker, at the conclusion of the business meeting, will be Mark J. Myers, Electronic Records Archivist, Kentucky Department of Libraries and Archives. He will be discussing e-mail management. I look forward to seeing you at our sweet home, Chicago. In the meantime, if you have any questions, concerns, or comments, please contact me at Mikecourtney1974@yahoo.com .

Michael Courtney
Records Management Roundtable Chair



Participate in the SAA Mentoring Program

Dear SAA Members:

Remember when you were just starting your career?

Professional advice was almost a currency – and there was never enough high quality, bankable currency. Many archivists starting out feel the same way. You can help.

The SAA Mentoring Program has received a large number of requests for mentors from many new protégés. Briefly, the role of the mentor is to discuss your protégé's career goals and objectives, to introduce your protégé's to other professional colleagues, and to suggest appropriate continuing education coursework, workshops, or annual meeting program sessions. You can either meet your protégé at the Protégé Break at the annual meeting, or if you live near your protégé, in person. Please consider becoming a mentor. To apply, click the link below:

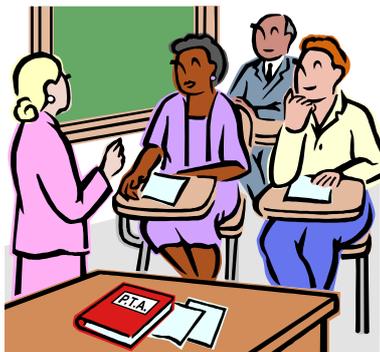
<http://www2.archivists.org/membership/mentoring>

Many Thanks,

Michael Courtney

SAA Mentoring Program Subcommittee

**GNO-ARMA ICRM
Examination Preparation
Workshop, July 14**



Mark your calendars! The Greater New Orleans ARMA Chapter will be hosting a Certified Records Manager (CRM) Exam Prep Workshop on Thursday, July 14, 2011. We are excited to offer this educational opportunity and hope you will make plans to attend. The Event Details and Registration Form are attached.

If you have any questions about registration or the workshop, please contact Emily Martin by at (504) 593-0961 or by e-mail emartin@stonepigman.com.

RMRT Steering Committee Candidates for the 2011 Election

Chair and Steering Committee Brad Houston



Biography

Brad Houston is university records officer at the University of Wisconsin-Milwaukee, and has served for the last 2 years as vice-chair of the RMRT. He has presented on electronic records and records reformatting to professional groups such as the Southeast Wisconsin Archivists Group and the International Institute of Municipal Clerks, and has been heavily involved this year with implementing campus guidelines for compliance with the National Science Foundation's new data management plan requirement for . Before coming to UW-Milwaukee, he worked as a records management intern at the Executive Office of the President, and performed archival and records management work at the Truman Presidential Library, National Geographic, the United States Holocaust Memorial Museum, and the University of Maryland Archives. As UWM Records Officer, he oversees and consults on records management functions and policy for over 200 offices and departments, including records inventory and scheduling, retention policies, records disposition, electronic records management, and long-term preservation of university records. He received a BA in History from Grinnell College in 2004 and a combined history MA/MLS with archives/records management specialization in 2007 from the University of Maryland-College Park.

Statement of Interest

As chair, I would primarily be interested in continuing or reviving some of the programs that the RMRT has been working on for the past few years, such as the functions thesaurus and the mentoring program. Last year, we discussed in some detail plans for outreach to various SAA student chapters, but for various reasons these never materialized; I think it is particularly important that we build and maintain good relationships with these new entrants to the profession. For established records managers, we would do well to update the RIM primer, which was last updated in 2008 and is showing its age in light of emerging developments in the IT and records fields. We should also revive our Education committee's more general mission of providing resources for professional development; in particular, Web 2.0 platforms (social media, blogs, etc.) have exploded of late, and I am sure many archivists/records managers would support a forum to discuss their RIM implications. Most of all, I want to get the membership of the RMRT engaged again, providing the steering committee with ideas and resources and having the committee act to show that the membership is appreciated.

**Steering Committee
Donald Post**

Biography

Donald Post. IMERGE Consulting Partner & Owner. Previously, was Senior Manager of Xerox Professional Services, and a Senior Consultant with A.T. Kearney Management Consultants. Was AIIM2005 Conference Chair (program committee 2002-2005) , and TAWPI 2006 Conference Chair (program committee 2003-2006). Recognitions include Certified Document Imaging Architech (CDIA+) and TAWPI Information Capture Professional (ICP) certifications; AIIM ERMp and ECMp certificates; and AIIM LIT designation. Active in AIIM standards committees for digital archiving, IEEE Mass Storage Systems & Technology Initiatives (MSSTC2010) and the SNIA.org Long Term Preservation Working Group. Don leads IMERGE's training practice since 2005 for the AIIM Electronic Records Management (ERM) certificate program, TAWPI ICP and CDIA+. Focus is on industry education, enterprise infrastructure, technologies and policies for assuring excellence in information management. Member and past speaker of ARMA; member and professional development committee of NAGARA; and member of SAA. Collaborating with Charles Dollar of Cohasset in jointly providing client consulting services for long-term digital preservation assessment, strategies, planning and procurement. Holds a BS in Electrical Engineering from Purdue and an MBA from Bradley.

IMERGE is a leading independent analyst firm providing management and technology consulting services to help clients save money and improve productivity. Our focus includes training, records management, electronic content management, business process improvement, document and data capture, collaboration and compliance advisory services. We help clients improve ROI, clearly define requirements and business case, evaluate software and deploy systems faster. IMERGE has over 20 offices located near major cities across North America.

Statement of Interest

I am interested in serving as a member of the Steering Committee, and potentially as an officer in future years. I am actively working on several teams focused on records management and long-term preservation & access to digital information. Our efforts have resulted in a Long-Term Digital Retention and Preservation Reference Model Site which is the most comprehensive in the world.

<https://sites.google.com/site/longtermdigitalpreservation/>

**Newsletter Editor and Steering Committee
Lorette Weldon**



Biography

Lorette Weldon, author of *SharePoint without Coding: My Notes for Embedding the Librarian*, [Volume 1](#) and [Volume 2](#), 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 for the Society of American Archivists. She was the chapter archivist for **SLA's Maryland Chapter** and the webmaster for **SLA's DC Chapter**. She is the webmaster for RMRT's website.

Statement of Interest

As 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. I would continue to work on the key elements that members wanted in a newsletter: 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. I would enhance my creative energies into retrieving and inputting information that may help in guiding the chair and vice-chair on matters pertaining to the administration of the roundtable. I would also promote roundtable activities within various institutions. The newsletter would reflect the current issues of archival and records management. These issues, within the newsletter, would also be managed in an agreed retention policy and online repository that members could reach anytime of the day.

**Steering Committee
Beth Cron**

Biography

Beth Cron is a Program Specialist at the National Archives and Records Administration in College Park, MD in the Office of the Chief Records Officer. She is a member of the Electronic Records Management (ERM) Policy Team that develops guidance for Federal agencies to help them comply with records management laws and regulations. She is past administrator of the Toolkit for Managing Electronic Records (<http://toolkit.archives.gov>) and is the membership coordinator for the National Archives Assembly. She previously worked on the Digital Preservation Management Workshop at the Inter-university Consortium for Political and Social Research (ICPSR). She serves on the Archives and History Committee at Foundry United Methodist Church in Washington, DC and provides guidance on records management and retention schedules. She is a graduate of the School of Information at the University of Michigan where she specialized in Archives and Records Management. During graduate school, she worked at the Gerald R. Ford Presidential Library and served on the board for the SAA Student Chapter. She received a BA in History from DePaul University.

Statement of Interest

As Steering Committee member, I would carry on the work done by the RMRT in the past few years, such as the Resume Guide and The Records Manager Newsletter. I would be interested in creating a dynamic and collaborative resource for managing the Records and Information Management Primer bibliography that brings together the expertise and knowledge of RMRT members. Many SAA members hold positions with both archives and records management duties and it is critical that we continue to build a foundation for strong records management programs to support their work. Also, there is significant research and work being done in related information management fields that would be helpful to share with the RMRT.

**Steering Committee
Katie Nash**

Biography

Katie Nash holds a Masters in Library and Information Science from the University of North Carolina at Greensboro and a BS degree in Anthropology from Appalachian State University. Currently, Katie Nash is the University Archivist and Special Collections Librarian at Elon University and has served in this position for six years. Elon University is a small private 4-year liberal arts university in North Carolina that primarily focuses on undergraduate education, but has four graduate programs and one doctorate program. In this position, Katie is responsible for all aspects of University Archives and Special Collections including acquisitions, accessioning, arrangement, description, preservation, cataloging, digital projects, records management, and reference. In addition to these duties, Katie also supervises two volunteers, one student assistant, and one part-time staff position. Prior to serving as the University Archivist at Elon, she worked as the Archives Assistant at the Greensboro Historical Museum in North Carolina. In that position, she gained valuable skills in archival practice and standards, as well as archival theory. Currently, Katie serves as the North Carolina Key Contact for the SAA Membership Committee, the Secretary for the North Carolina Preservation Consortium, and the Editor for the Society of North Carolina Archivists' bi-annual newsletter. She is a member of the following organizations: Society of American Archivists, American Records Management Association (and member of local Triangle Area chapter), Society of North Carolina Archivists, North Carolina Preservation Consortium, North Carolina Library Association (member of the Roundtable for Special Collections), and the Alamance County Historical Association.

Statement of Interest

I am interested in serving as a Steering Committee Member on the Records Management Roundtable Steering Committee because I am truly interested in getting more involved with organizations and committee's that focus on records management. This past year I have been named the records management coordinator for Elon University, and while I have no formal training as a records manager, I am eager and willing to fulfill this position to the best of my ability. It is necessary for me professionally to expand beyond the archives community, and make connections and form relationships with professionals in the records management community. While I have a wealth of experience working in a University Archives and

Special Collections, I also has experience serving on a variety of committees within organizations. I serve on both national and local committees related to the library and archival professions, and also serve on a number of university committees at Elon University (including serving as the Chair of the Records Management Advisory Committee). I feel this committee would be an excellent place for me to not only get involved in a records management committee, but also bring to the table my unique experiences, abilities, and perspectives that I have gained through working at a private university.

Vice-Chair and Steering Committee

Prisca Giordani

Biography

Prisca Giordani is currently working for the International Monetary Fund as Archivist/records officer. She is responsible for the appraisal, selection and description of the Asia and Pacific department's records and she is part of a team working on a pilot project on preservation over time of digital records.

She holds a contemporary History Degree from the University of Rome and specialization in the Archival field, both at the University of Rome and the University of Vancouver, British Columbia, Canada (Master Degree at the School of Library, Archival and Information Studies). In Canada she was also Research Assistant for a project on Electronic Records (InterPARES).

She has been involved in traditional research in international and national research projects concerned with historical, administrative and archival fields and has also participated in several research projects for the preservation of authentic electronic records and record keeping: the two most significant projects were InterPARES and ERPANET.

She has been working in the actual archival and records management environment, both influencing archival product creation by IT industries and as a manager of the current and historical archives of several institutions and providing teaching and training.

While working for a European Union agency in Thessaloniki, Greece, as Archivist and Records Manager, she had the occasion to gain experience in deploying organization-wide electronic document management system. This type of experience (with several other types of ERMS) is also a considerable part of her previous professional experiences. At the Historical Archives of the European Union, she directly managed: the implementation of the ISAAR (CPF) standard in the archives; the Records and Archives Management project for the European University Institute (RAME), who provides guidance to ensure that EUI staff create records correctly in the course of their duties (delivering classification schemes integrated with retention schedules), provides guidance to ensure proper management of records in EUI offices and assists in delicate jobs such as selecting records so to ensure that records of continuing value are preserved and accessible as EUI archives; the creation and maintenance of the intranet web pages

devoted to the RAME project and the workflow for the processes of transfer to the archives or destruction of inactive records.

Statement of Interest

I would like to be part on SAA Records Management Roundtable Steering Committee as I think it is time for me to me more directly involved and participating in my area of interest in the field.

**Society of
American Archivists**

17 North State Street
Suite 1425
Chicago, IL 60602-3315

tel 312/606-0722

fax 312/606-0728

toll-free 866/722-7858

RMRT is on the Web!

See us at:

<http://www2.archivists.org/groups/records-management-roundtable>

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.