

# THE RECORDS MANAGER

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*Newsletter of the Records Management Roundtable*  
*of the Society of American Archivists*

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## ANNUAL MEETING PROGRAM PROVES TO BE WORTH THE TRIP TO CHICAGO

If you only had thirty seconds to decide where your records are filed, how would you organize them? Would you create a large A-Z file system, a coded numeric file system, an office-specific subject file system, or a system that is more intuitive, flexible and reflects exactly how you work?

A functional filing system allows the user to create a system that works with them not against them and that identifies file locations in under 30 seconds. Sounds fantastic, but it is true. Hear about a working functional file system and how you can accommodate it to your needs at our annual meeting in August.

Jackie Esposito of Penn State University will present a short program on this subject to us at the annual meeting in August.

Join other records managers and archivists on August 29th at 6:00pm for our roundtable annual meeting.



**SOCIETY OF  
American  
Archivists**

## NAME CHANGE FOR THE ROUNDTABLE???

A proposal has been kicked around to change the name of the roundtable from the "Records Management Roundtable" to the "Records and Information Management Roundtable." This will require SAA Council approval, of course, but the steering committee is interested in hearing from practitioners on the prospect of this

change and its potential impact on both the number of roundtable members and the influence of the roundtable on the records management profession.

Please contact your steering committee members concerning the name change.

## THE RECORDS MANAGER

### MEET YOUR STEERING COMMITTEE

#### MATTHEW EIDSON

I've been an Appraisal Archivist/Senior Records Analyst at NARA in the Life Cycle Management Division for about four years working on a variety of records management issues with agencies throughout the Departments of Homeland Security, and Health and Human Services. My job has primarily been focused on the development and appraisal of agency records schedules, in particular those dealing with electronic records. As an appraiser, I analyze and help to decide which of those records warrant permanent preservation and eventual accession by the National Archives. My job is to put together the rationale for permanent preservation or temporary retention of agency records and present the case to a variety of stakeholders including the general public. I also serve agencies as an advisor on best practices in records management dealing with issues

such as e-mail management, implementation of RMA's, privacy and FOIA, RM program support and development, and training.

Before working at NARA, I worked at the State Archives in Georgia in a assortment of apprenticeship jobs including preservation, reference, microfilm, and administration. I was strongly encouraged to continue my education and join a professional association by my mentor (whom I am ever grateful to) Ms. Brenda Banks, Deputy Director of the Georgia Archives. I went on to pursue an MLIS in the archives track at the University of Pittsburgh under Dr. Richard Cox. Currently, I've been assigned on a long-term detail at the Washington National Records Center in Suitland, MD where I serve as an Acting Director of Records Center Operations. The detail has been both very rewarding and

challenging at the same time.

It has really opened my eyes giving me a feel of how records schedules (some of which I helped to develop) are actually implemented. As a member of the RMRT steering committee I hope to be able to bring to the group a sense of balanced perspective both from a practical sense but also with theoretical foundation in archives and records management.

Something not everyone knows about me is that I'm a citizen-soldier (going on 14 years) in the United States Army Reserve. I am one of those guys that lace up my boots every so often in service to country. In the Army I'm a Military Police Lieutenant which gives me a variety of unique challenges and opportunities vastly different from those in records management. I look forward to continuing my professional service in SAA and in part to the RMRT.



**Matthew Eidson**

Appraisal Archivist/

Senior Records Analyst

NARA

*"To catch the reader's attention, place an interesting sentence or quote from the story here."*

## BECOMING A RECORDS MANAGER

Steve Fisher, University of Denver sfisher@du.edu

In 2006, after nearly thirty years as a University Archivist, I became a records manager.

My institution, the University of Denver, was founded in 1864 and though it is one of the oldest institutions in the state it had never had a records manager prior to last year.

Corporate scandals such as Enron and Arthur Anderson prompted the University to take a fresh look at records management. After a failed national search to hire a Records Manager I agreed to take on the responsibility on a temporary basis.

Our first priority was to create a records

retention schedule and we hired a records consultant to help us begin the process. My heart sank when I realized that there were over 150 offices at our institution and I (with the help of two assistants) would have to survey every one of them about the state of their records. We began the survey process in February of 2006 and just recently finished it. We are now in what we refer to as Phase II of the project, seeking feedback from units on a draft records retention schedule we have circulated around campus.

Challenges ahead include getting the retention schedule approved by our Board of Trustees, determining how to

insure compliance, and how to deal with the thorny issue of electronic records. In the survey stage a record was a record, electronic or paper, but now format will become important. A very large percentage of all records created at the University of Denver are on the Banner system, and imposing a records management component will be a challenge. So far I am dealing well with my "mid life crisis." I have seen parts of campus I never knew existed and met many administrators, faculty, and staff I would never have had the opportunity to meet had I not taken on this project. The majority are cooperative and very positive about the project and that has helped us considerably.

## NOTES FROM THE CHAIR

**Margaret Merrick, Chair**

mmerrick@ctr.pcusa.org

Before we know it, the 2007 Annual Meeting of SAA will take place. Chicago is the host city and the meeting takes place from August 29-September 1 at the Fairmont Hotel. During the annual meeting Sections and Roundtables meet. The annual meeting of the roundtable will take place on August 29th from 6:00pm to 8:00pm. I invite you to take part in the Records Management Roundtable meeting. We have an exciting program planned. Jackie Esposito from Penn State University will discuss using a function-based classification system for records programs. A discussion will follow. A short business meeting will also take place during the meeting.

The Records Management Roundtable is a forum for records managers to meet and discuss issues unique to our profession. One of the best aspects of participating in a roundtable meeting is the chance to meet people in a smaller forum. Many of the sessions have so many attendees it can be difficult to have the personal contact and networking that is important and fun. Participation in a roundtable meeting provides an opportunity to do this at a large meeting.

Another way of participation is to serve on the Steering Committee of the Records Management Roundtable. The roundtable has room for more members and I urge people who are interested to

contact me. Serving on a steering committee is a great way to be more involved in SAA. In my early years of SAA membership, I served on the College and University Section steering committee and it proved to be very rewarding. I have found that SAA has always been encouraging in a member's effort to participate in committees. I urge anyone who is interested in taking the next step and becoming involved in a leadership role to consider working with the steering committee. The duties are not onerous and the rewards are high. We look forward to your participation!

***More Members  
Are Needed for  
the Records Management Roundtable.***

***To Join, Please  
Email to Chair,  
Margaret  
Merrick.***

## THE RECORDS MANAGER

# JOINT ARMA/SAA COMMITTEE ON ARCHIVES AND RECORDS MANAGEMENT MEETS

## Minutes of the Joint ARMA/SAA

Committee on Archives and Records Management

October 24, 2006

8:30 am

Attendees: SAA President Elizabeth Adkins; ARMA President Susan McKinney; Joint Committee Members Bill Millican, Christine Figueroa, David Best, Judy Huenneke, Jim Cassidy.

The Minutes of the previous meeting of the Committee at SAA in Washington, DC, August 2, 2006, were previously approved.

The newly published Joint Committee brochure, "Identifying Archival/Permanent Records in Records Management Programs, brought in by Bill was admired. The brochure is being distributed at both the ARMA and SAA booths. (David Best raised a question as to the whether the brochure was covered by copyright. Bill Millican agreed to check into).

Cassidy asked the Presidents of SAA and ARMA if they had any news or other reports for the Committee.

SAA President Adkins began by noting that SAA Council had a meeting the next week. SAA objectives were concentrated in three broad areas, Technology, Diversity, and Public Awareness. Work in these areas includes:

Technology: A review of the possibility of a publication on Best Practices and Guidelines, perhaps an annotated bibliography.

Diversity: Further consideration of what diversity is in the profession. Not just racial and ethnic diversity, but a diversity of backgrounds, training, geographic locations etc. Adkins mentioned the creation of a Task Force aimed at raising awareness of the archival profession at traditionally Black Colleges and Universities.

Public Awareness: SAA had begun a "Public Awareness Month," based on grass roots efforts of past years. Other ideas include the creation and distribution of a "public relations kit, the work of SAA Director Nancy Beaumont.

Adkins concluded by noting that 4-5 other task forces were being appointed, including the Partnership for the American Historical Record.

Susan McKinney began by noting that her main concern since the last Joint Committee meeting at SAA was the ARMA Conference. There were approximately 3600 attendees at this ARMA meeting. Also noted was the International Council on Archives (CITRA) meeting in November 2006. In addition April 2007 is Records Management Month.

## PRESBYTERIAN CHURCH (U.S.A.) EDUCATION DAYS

As Records Manager for the national offices of the PC(USA), I work for the Presbyterian Historical Society the official archives for the denomination, located in Philadelphia. But I am based in the national offices headquarters in Louisville, Kentucky. As records manager for the National Offices, I have met and worked with most of the staff in our building. I have one of the most enjoyable jobs in my opinion because I get to work all over our building. But it can at times be an ad hoc process. This year, I have an opportunity to reach even more staff. The national offices of the PC(USA) have biweekly Education Days. They are a required training event for General Assembly Council staff and the content varies each year.

This year, I was invited to take part to teach electronic records retention. This forum has been a wonderful way to reintroduce basic records management as well as to discuss the challenges of electronic records management.

This is first regularly scheduled training event in which I participated. I have found the staff receptive to the classes at Education Day and in the first sessions, very interested in the component on managing email. The teaching sessions are energetic and it gives me a chance to interact with a larger number of staff in the building at one time. I still meet individually with staff and with offices at staff meetings to discuss records management issues as a way to reinforce the sessions.