



Records Officer Forum agenda

Sept 20, 2019

1:30 PM – 3:30 PM

Dept. of Revenue, 6400 Linderson Way SW, Tumwater

Icebreaker – What is one important skill every person should have?

Some answers were –

Adaptable	Willing to take risk	Listening skills/listen to hear
Patience	Ask for help	Empathy
Tact	Communications	When to remain quiet
Thinking quickly	Organizational skills	Endurance

Name change

One hundred and eighty one (181) surveys for our new name were sent out. We received seventy four (74) responses, which is a 40% response rate.

Washington Records and Information Manager (WARIM) was the top choice with 26% of the survey votes. The second choice was Washington Records and Information Managers (WARIM) with 12% of the survey votes. The third and fourth choices were WARMO or WRMO – Washington Records Management Officers with 10% of the votes for each version of the acronyms (same name, different acronyms).

We voted during the meeting for the top four choices. With 14 out of 17 in-person votes, the new name of WARIM won. **Records Officer Forum will now be known as WARIM Forum.**

Next step is branding. We currently have a logo but it needs to be resigned so it's easier to read and a review of the charter is due.

Assistance from the Group

Best Practices - We are community so we need to show our best practices so others do not have to reinvent the wheel. Maybe add to our website?

Classification – Records management positions are not consistent throughout the state agency. One agency's RO position might not be paid as well as another agency. IT reclassification just recently happen. The RO job is overdue for an updates.

Imaging reclassification - Same issue as above. Plus there is the issue where the job lands – facilities, IS, etc.

Departing employee's calendars – how do you deal with their calendars? One agency is not vaulting so they are running into an issue different from others since most agencies use the

vault to retain the records. It was suggested that it's up to the supervisor to ensure they retain a copy of their departed employee's PST file.

Office 365 and eDiscovery – User group might be established. When deciding if your agency is going to use Office 365, take a look at third party options.

SharePoint installment – no training was offered at the time but every employee had to use it. Make sure you are at the table so the correct decisions are made.

For the Good of the Order

Two Records Officers serve on the Washington Association of Public Records Officers ([WAPRO](#)) board now. Two other positions are available so please apply.

Projects that are currently being worked on by –

Dept of Fish and Wildlife are working on their systems assessments. Tammy Lee, L & I has an established system assessment.

Dept of Revenue is working on possible new position for a data librarian – Some of the issues that are being worked out are how it will be classified? How it work with other team members (records management, public disclosure, and privacy)?

Dept of Retirement is working on their records inventory. Some lessons learned are don't split the inventory by paper and electronics records. It is easier to go by sections/offices than by electronic or paper format.

Subcommittees (group discussion)

We asked attendees to select a group (listed below) where they could discuss issues and solutions, recommend tasks, provide input, or just listen. The attendees were not obligated to remain part of the subcommittee or volunteer for any tasks.

After the discussion, we asked each subcommittee to report out with review of the tasks/tag line, summary of their discussion, what are the next steps, and when is the next meeting.

Please note that some subcommittees were combined for efficiency.

- Website and Communications

This subcommittee combined Website and Communications.

Tasks/tag line: Improve communications between members, including website.

Secretary of State can sponsor the site. They will use their listserv when content has been added to the page. They discussed what content should be on the site. Ideas were list of ROs, links to professional associations, best practices, and examples of policies and procedures.

Next steps –

Carissa Bourdon will share the notes from previous website meeting with Russell Wood.
SOS staff will create sample site and show at the next WARIM meeting.

Next meeting –

End of October at the Tumwater Library, date and time to be determined.
Russell may have the beginning of our webpage ready to present.

- Professional Development Subcommittee

This subcommittee combined Professional Associations and Training/Certification as well as changed their name.

Tasks/tag line: Report out and keep members informed of actions, events, and obtain training for forum or other events, obtain certification, etc.

Next steps –

Going to update flyer with summary of each professional association.
Will add SOS and links for webinar to the training opportunities listed on flyer.
Will list local members of each association and share with group.
Will add this information to website.

Next meeting -

First Tuesday of every month. Next meeting is virtual on Tuesday, October 1, at 1:30 PM.
Location will change but first one is virtual.

Suggestion for another subcommittee -

Establish document to be used in new employee's orientation. Add responsibility to employees' profession plan development (PDP) that they will manage their records in according to retention schedules.

Might need to ask Legislation and Policy subcommittee if they can further develop this idea.
Maybe they can create a sample for agencies to use.

Legislation and Policy

- Involvement with policy members.

Tasks/tag line: Watch and report out on bills and other actions that pertain to records management and public disclosure to keep members informed.

ROs need to have a relationship with their agency's legislation liaison so they are involved in upcoming issues. If we are the ones that bring up the issues to our liaison, they will know we are passionate and committed.

Once you are recognized as an expert, lobbyists or other groups might reach to ROs.

Suggestion for further training topic –

What is ok for ROs to do when protesting? What is not authorized? Can ROs picket the Capital as an example?

Next step and meeting -

No next meeting is planned since majority of the members are not present.

- Leslie Turner's retirement party

Tasks/tag line: Plan party, purchase gift, design invites, etc.

Gift has been purchased. Donation jar will available at event to pay for Leslie's card, gift, dinner, and drinks.

Next steps –

Make reservations at [River's Edge Restaurant](#) for Friday, October 11, from 5:00 PM – 9:00 PM (June Brown). We believe 50 – 70 folks will attend.

Create and email calendar invite to ROs. Add the following text –

“If you know someone who knew Leslie, please forward this invite.”

“You can order drinks and food from the menu.”

“Casual dress.”

“RSVP to June Brown no later than October 4 so we can provide a headcount to the restaurant”.

Card will need to be purchased (June Brown).

Retirement cake will need to be purchased (Mark Kifowit).

Will ask for a volunteer to take photos at the event.

Upcoming Events

Local

~~Nov 14, 9 AM~~

WARIM Forum

Tumwater

Been moved to Dec 6 at 10 AM.

Jan 22 – 23, 2020

Records Mgt Winter Forum

Lynnwood, WA

(FreeDoc is sponsoring this event. Details to follow.)

Out of State

October 21 – 23, 2019

ARMA Live! Annual Conference

Nashville, Tennessee

Training Opportunities

SOS Training Calendar

AIIM Webinars

NAGARA Webinars