

RMRT SURVEY 2008

REPORT TO MEMBERSHIP

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INTRODUCTION

The RMRT steering committee compiled a survey in the Fall of 2008 to assess the roundtable membership's thoughts and ideas on the programming and future programming of the roundtable. The survey was conducted via email from November 1st to November 30th, 2008. There were sixty seven (67) respondents, or 22.1% of the membership. Below is an action plan for implementing or using the survey responses to better the programming of the RMRT.

OCCUPATIONAL DEMOGRAPHICS QUESTIONS

1. What is your highest level of education?

Results ranged from high school diploma (1) to doctorate (5), but the majority of responses were submitted by members with masters degrees (55).

2. What certifications do you currently hold?

Twenty seven (27) respondents said they held a certification. Certified archivists made up the largest group (5) and at least one respondent held a certification not related to records management (RN). Some confusion may exist between holding a certificate of completion and a certification.

3. How long have you been an archivist/records manager/information professional?

Responses ranged from less than one year to more than twenty years, with the mode for this question being five to nine years.

4. In what type of records industry are you currently employed?

Academic practitioners answered this question more than other types of practitioners, which mirrors the membership percentages (academic practitioners highest) in the RMRT.

5. How long have you been at your current position?

The majority of respondents have been in their current position less than ten years.

6. Which of the following records management duties do you perform on a regular basis?

Most of the respondents said they perform four or more of the duties listed. A long list of additional duties was also submitted by respondents.

7. How did you become a records manager?

The largest number of responses were from members who took positions that have both archives management and records management duties, but the second largest number of responses were from members who took archival management positions that eventually had records management duties added to their position.

8. How do you classify yourself?

Members with equal archives management and records management duties predominated here, but those with few records management duties came in second.

9. What other sections/roundtables do you belong to besides the Records Management Roundtable?

The top four other section/roundtable memberships represented are: Electronic Records Section (15) Lone Arrangers Roundtable (10), Government Records Section (8), and the Preservation Section (7). At least one respondent belonged to each of the thirteen (13) SAA sections. Respondents belong to eleven (11) of the twenty-six (26) SAA roundtables.

10. Are you a member of any other professional organizations related to records and information management?

ARMA and ARMA chapters predominated the other professional organization memberships of respondents.

11. How many hours do you spend each week at volunteer activities related to your professional life?

Respondents indicated they do not volunteer weekly (20), not at all (18), and two to five hours a week (16).

ROUNDTABLE PROGRAMMING QUESTIONS

12. The Archives Management Roundtable/RMRT Joint Working Group on Diversity in Records Management and Archives is charged “To contact and network with persons with physical disabilities in the archives and records management profession (archivists, records managers, and researchers/patrons), identify and study the challenges for them in same, and develop tools to assist them in overcoming these challenges.” What do you think should be the priorities and activities of this group in the upcoming year?

The Archives Management Roundtable/RMRT Joint Working Group on Diversity in Records Management and Archives has been following up on the 2008 survey of colleagues and other peer groups. Feedback from the survey has been helpful in framing priorities for this year and for providing ideas for other projects. One issue that surfaced was why do persons with disabilities need to be viewed differently than any other ‘minority’ group? Equally vocal were others who felt that the issues facing professional with disabilities were not well defined. To respond to both of these concerns the Group will work to more fully to identify and define the challenges faced by those with disabilities and explore how these challenges differ from other minority groups. Another point raised was the question of electronic accessibility. The charge from SAA is to focus on physical accessibility issues; but electronic accessibility is an issue that will be part of the Group’s consideration of the broad context of disabilities and access. One concern raised by the survey was confusion about the focus of the Group and its related goals. The desire to clear up this confusion has led the group to refocus and reframe priorities so that our mission is supported by our actions.

13. The RMRT/Lone Arrangers Roundtable Joint Committee on the creation of a records management manual for lone arrangers is charged “to develop a procedures guide specifically useful for Lone Arrangers working in archives who are starting a records management program.” What do you think should be included in the final product of this group’s work?

The survey results indicate that we should create: an online introductory overview on the basics of RIM for a lone arranger shop. Focus would be on minimal procedures and quick assessment tools/checklists. Sections would include: Overview of pieces of a RM program; implementation procedures - inventory-taking, creating surveys; legal considerations; outreach and training; case studies. Appendices would contain bibliography, resource list and sample procedures, schedules, and policies.

14. The RMRT is currently working with the Electronic Records Section to develop an SAA continuing education workshop on the preservation of electronic records and is working independently on developing a workshop to introduce archivists to records management. What suggestions do you have for other SAA continuing education workshops that might be developed specifically for records managers?

Due to lack of interest and participation, this group was disbanded. It may be reconstituted if there is a felt need by the membership for such an initiative.

15. What suggestions do you have to improve the RMRT newsletter, The Records Manager?

Most comments about the newsletter were very complimentary, but some common or related suggestions for improvement emerged:

Several respondents suggested that it’s too long and would like to see a shorter, more frequent publication. One person added that some of the information could be moved to the website, leaving only content-rich articles for the newsletter. This is echoed in the suggestions that we move to a theme-based publication. (although one respondent really likes the “interesting mix of philosophy, RM practice, and RMRT news”).

One person requested reviews of RM software and systems. According to our current guidelines, we cannot do this: “The newsletter shall not contain any advertisements, paid or unpaid, for products or services.”

Specific improvements requested:

- More focus on recent graduates
- Articles that better demonstrate the diversity of our backgrounds
- Case Studies
- A Federal records retention law published in each issue (Check copyright)

What can we do to address these suggestions?

- A co-editor will be enlisted to help with newsletter publication
- The length will be limited to fifteen pages per issue.
- Each issue will include at least two theme-based, related articles. One will be a practical, case study. The other will be a philosophical or theoretical piece.
- Each issue will feature at least one new graduate working in RM—a conscious effort will be made to draw these from all academic and professional backgrounds.
- Records retention laws will be featured in a format to be determined.

16. What suggestions do you have to improve the RMRT website?

The 24 qualitative responses to question 16 of the survey (that is of the 36% of all total respondents and 8% of total membership) generally addressed *aesthetics* or *content* or, in some cases, both. While 8 responses indicated that the current site is adequate or improved from the past, 17 responses specified enhancements and changes that would improve the experience for users.

Some of the suggestions by the membership are feasible within the production environment currently in place ("production" being understood in the broadest sense as both the human resources required and the technical infrastructure made available by the Society) while others are not.

Certain interactive features being sought at the Roundtable level, if implemented, would be redundant to existing services available at the Association level site; for example, one respondent's call for "resume uploading" capabilities available to RMRT members is best satisfied by making use of existing features accessible through the parent site. So visitors of the RMRT pages should be made aware of this service available elsewhere on the SAA's site as a benefit to its general membership.

Still other interactive features being requested will not be implemented as such due to limitations currently in place. The most salient example of this is the request for blogs and wikis to be featured. Neither the code nor the architecture of the SAA site permit blogware or wikiware, so a links page that directs users to other existing resources, outside of the SAA site, is the next best alternative.

In an effort to be responsive to the needs of the membership, efforts will be made to point users of the site to our areas of the parent site or resources outside SAA that provide intermediate solutions.

Improve look –5; Improve layout/navigation –4; Need links –4; Need blog – 2; Post examples/samples – 2

RECOMMENDATIONS

Publish a links page pointing to

- blogs and other 2.0 sites;
- published Records Retention Schedules and related policy/rules tools ; where possible, coordinate efforts with Lone Arranger's Roundtable/RMRT Manual effort to share content.

Add static content pointing users to resume/profile features offered as a benefit of SAA membership. Inform the SAA that a nice enhancement to the existing search options for the membership directory would be the ability to retrieve members by groups.

Clarify links that form the site's global navigation

- Qualify some of the existing labels- e.g. Modify "Resources" to "Educational Resources"
- Provide explanatory text in the main body of the pages that further described what the users can expect to find in the different sections

Increase awareness of the new site

- Create, vet, execute, evaluate, and report on a communication plan that highlights new postings, etc. and define/target audiences

17. What do you think are the most beneficial aspects of RMRT membership?

Respondents were pleased with networking and learning opportunities available through the RMRT, the high level of activity and opportunities to participate, and big picture goals pursued by the RMRT.

Respondents cited specific resources/elements such as:

Networking and learning:

- Newsletter
- Discussion listserv
- Mentoring program
- Learning from “old-timers” in the field
- Learning about the field in general and how others are resolving issues
- Online information available about RM
- Newcomers welcomed
- Resume review for students
- Ability to scan the membership roster to seek people in similar roles

Activeness and participation:

- Active leadership
- Opportunities to participate

Intangibles offered by the RMRT:

- Advocating RM to archivists
- Bridging the archives-records management gap, integrating the two within an organization
- Becoming more well-rounded archivists

Respondents offered related comments:

- Hope for upcoming educational offerings
- Desire to participate but don't have enough time
- Not enough advertisement of opportunities to participate
- Not enough activity of the listserv

RMRT Membership Subcommittee's PLAN OF ACTION:

1. Invite and encourage RMRT members to participate in projects, including small flexible projects that allow one-time commitment
2. Submit and respond to discussions on the RMRT listserv
3. Welcome members to propose and lead completion of projects they find interesting

18. What projects, activities, and initiatives would you like to see the RMRT undertake in the future?

Responses to this question generally fell into four broad categories including the need to boost camaraderie within the RMRT, provide tools for use by archivists performing records management duties on the job, address the “archivists vs. records managers” issue, and raise awareness of records management issues within SAA.

The first category, boosting camaraderie within the RMRT, included suggestions to increase activity on the roundtable discussion listserv and possibly host live chats to encourage networking among the membership. Some respondents felt it would be a nice to host a gathering of RMRT members together at the annual SAA meeting. There was also a suggestion that CRMs might be able to serve as an advisory board of sorts to the roundtable.

Respondents also felt it important that the RMRT continue to undertake projects that provide practical RM tools for archivists. Suggestions such as a “how to” publication regarding RM for archivists, a directory of RM software tools and what organizations are using them, a bibliography of state and federal retention regulations, and comparison and contrast of various RM tools on the market were given by respondents.

Third, we are all well aware of the divide between archivists and records managers, but we also know how closely related the two professions are. Respondents offered that the roundtable should work on notions of cooperation and healing between the two groups, and establish and maintain working relationships with ARMA and other records management related groups.

Lastly, using outreach methods to raise awareness of records management issues was a high priority among respondents to this question. The need to prove the significance of records management to SAA and get a “seat at the table” is important. Also, respondents wanted the roundtable to support SAA conference scholarships, participate in RM month and showcase RM programs, and help with RM outreach to libraries and museums.

As a result of the responses to this question, the RMRT Steering Committee’s plan of action for 2009 will include:

Submit and respond to discussion posts on the RMRT listserv.

Organize an informal gathering of RMRT members during the 2009 SAA conference.

Develop a web-based showcase of RM programs in archives, perhaps to be unveiled during RM month.

Contact ARMA chapters in your geographic region and offer to present on an archives/RM topic at a chapter meeting.

Continue to encourage SAA to partner with ARMA on records related issues whenever possible.

Continue with ongoing subcommittee work to compile practical tools regarding RM.

19. What kind of programming or initiatives should RMRT undertake to help students?

The Records Management Round Table is an excellent opportunity for students and people new to records management to share experiences, ask questions, and network with each other and with seasoned records managers. The RMRT has implemented a few programs and initiatives since the creation of the Student Advisory Board in 2008, that have benefited many of its members. Some of these programs and initiatives include welcoming and encouraging student participation, resume review sessions, mentoring projects, and a student advisory committee. After several months members were asked to complete a survey about the RMRT, asking how it benefited each person and what could be improved on. Members were asked what additional programming and initiatives the RMRT should undertake to help students and came up with several ideas. These ideas included improving networking and available resources through listserv discussions and on-line chatrooms, and providing a list of schools and programs on the SAA website. Members suggested developing student scholarships and/or discounts on meetings and workshops, which is currently awaiting SAA approval. In addition to developing/implementing more internship opportunities, students should be encouraged to volunteer or find part time jobs working with records managers. It was also suggested that the RMRT include mid-career and other non-student archivists, as well as experienced archivists new to records management. There were several ideas discussed regarding education through SAA and MLIS/Archives academic programs. Through SAA, members would like to present a Records Management 101 session at the annual conference, develop workshops, create a records management webinar, and implement a continuing education course (which is also awaiting SAA approval). Through MLIS/Archives academic programs, members suggested visiting students chapters to promote records management, and lobbying programs to include more/improved records management education.

RMRT Steering Committee's PLAN OF ACTION:

Encourage new RMRT members to notify the Chair upon joining (via website)

Provide new members a virtual "welcome packet" on how to fully benefit from RMRT involvement (via website)

Encourage student participation in listserv discussions

Contact SAA Student Chapters and arrange for a nearby RMRT member to visit

Encourage SAC to develop and complete projects of interest