

## **IPER Records Information Management Webinar Meeting with MSA, DGS RM, MEMA, and DOIT**

March 19, 2010

In attendance: Tim Baker, Maya Davis, Carrie Gross, Chris Haley, John Harding, Richard Herring, Vicki Lee, Kim Moreno, Sarah Patterson, Emily Squires, Kevin Swanson, Jane Thursby, Terraceta Tubaya, Linda Zacharski

- I. Introduction
  - a. Tim Baker (MSA): Introduction and background of IPER
  - b. Attendees introduce themselves
- II. Viewing of the presentation “Introduction to Records and Information Management for State and Local Governments: Training Support Package” available at [http://www.msa.md.gov/cosa/cosa\\_rim\\_final92109.swf](http://www.msa.md.gov/cosa/cosa_rim_final92109.swf)
  - a. Overview of IPER
    - i. 3 audiences for IPER Training: Emergency Management (EM), Records Management (RM), Information Technology (IT), but also designed for government employees at every level.
    - ii. Key terms used by IPER available at <http://www.statearchivists.org/resource-center/rim/>
  - b. Provides the What, Why, Who, and How of Records Management
    - i. Records protect life, property, and rights. They provide information needed to restore order and resume operations following a disaster.
    - ii. Care for the life cycle of records from creation to maintenance/use to either destruction (non-permanent records) or preservation (permanent records)
    - iii. RM is for all records regardless of format.
    - iv. Managing records is NOT optional - it is the law at the federal, state, and local levels.
    - v. There are benefits of good records management and problems, risks, and liabilities of poor records management
  - c. Managing the Records
    - i. Terminology has different meanings to different personnel: records managers, emergency managers, information managers
    - ii. Public record: government records are public but do not guarantee free and open access to record, or at least not immediately
    - iii. Approximately 3-5% of government records are essential (permanent) records
    - iv. Electronic Records: definitions and examples (e.g. email can be a record and should be treated as such, make decisions regarding retention based on content, not format)
    - v. Trustworthiness of records: authentic, reliable, and not deceptive; reasonably sure security is never compromised or tampered.
    - vi. Records inventory of a series is one of the cornerstones of records management and are used to compile records retention schedules

- vii. Recordkeeping requirements in laws, regulations, and agency directives must be complete, concise, compliant, and cost-effective
- viii. Challenges of managing electronic records
  1. software dependency; ideally to not be dependant on software
  2. sustainability; to ensure records are accessible in the future
  3. limitations to the life of media formats
  4. Sharing/distributing records can negatively impact trustworthiness of the record
  5. security issues
- ix. IT is crucial to helping with RM of electronic records

### III. Where to go next with IPER

- a. It should not be limited strictly to RM but should be presented to all records management officers and all local emergency management, Red Cross, COOP, etc. Everyone creates and protects records.
- b. We could use MEMA's Emergency Operations Center (EOC) in Reisterstown for some of the kickoff webinars in April-May 2010 (holds about 80 people).
  - i. Split the classes there and at MSA.
  - ii. There are other EOC's we could use: PG, Eastern Shore, Western Maryland
- c. Change only comes from the top down; get buy in from top down and our job is to assemble the masses and sell it so that the bosses understand it's importance
- d. Tim (MSA): Our backup hot site at UMBC; if you're on state network, you can backup to UMBC
- e. MEMA is using a 1993 RM Manual; even records managers are behind.
- f. Jane Thursby (MEMA) volunteered to go to the Train the Trainer in July 2010 in Atlanta and can go for free
- g. Need to make emergency managers see their role as protecting life and property
- h. Jane (MEMA) can give us dates EOC is available for the webinars
- i. Richard Herring (DGS) will not have his replacement on board until late April or early May
- j. Tim (MSA): Should we get Governor's Homeland Security involved? MEMA's person in Governor's office?
  - i. Jane (MEMA): Her boss' boss: General Adkins
- k. John Harding (MEMA): MEMA has their own RM training branch
- l. Tim (MSA): How can we more involve Secretary Collins?
  - i. Maybe he could just mention this in a cabinet meeting
  - ii. Perhaps Richard could pull off a couple of slides and brief secretary on this
  - iii. John (MEMA): Need a presentation for buy-in and this current one from IPER is not it

- iv. Chris Haley (MSA): Financial impact; how planning for saving records during emergency will save agency and put in figures so that can be justified
- v. Jane (MEMA): COOP is a core goal for Governor O'Malley and reported on every month
- vi. Also, Department of Interior has grant money to support preservation of cultural items (ESF 14)
- vii. Governor has asked Department of Planning to be in charge of this, but MSA and DGS/RM should be part of it. Department of Interior wants DC to be guinea pig and apply for ESF 14 grant

### **Meeting Sign In/Contact Information**

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