CAREER PATH FOR THE NEXT GENERATION RECORDS MANAGER

San Jose State University
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Presented by:
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- Director of Information Governance at FileTrail
- Co-founder of The Information Governance Conference (InfoGovCon)
- ARMA CT Immediate Past President
- Author of ARMA IGP Prep Course
- AIIM Education Partner
Earning professional certifications can help an information professional establish credibility, but choosing the most relevant ones from among the many available can be a challenge.

– Jeff Whited, ARMA International
What’s the Difference?

**Certificate**
- Results from an educational process
- For both newcomers and experienced professionals
- Awarded by education programs or institutions
- Usually listed on resume
- Demonstrates knowledge of course content at end of set period of time

**Certification**
- Results from an assessment process
- Typically requires some amount of professional experience
- Awarded by third party, standard-setting organization
- Typically results in a designation to use after one’s name (IGP, CIP, CRM, PMP, etc)
- On-going requirements in order to maintain – CEU’s
AllIM Certified Information Professional

Developed in accordance with ISO Standard 17024 to ensure conformity to accepted procedures for individual certification programs

Demonstrate your ability to bridge IT and business

Keep your information management skills current and competitive

Lead your organization into the world of social and mobile content
Eligibility Requirements

- There are no mandatory requirements

- AIIM recommends candidates have a minimum of 3 years experience and increasing responsibility in one or more topical areas, or a Bachelor’s Degree in an information management-related discipline (for example, library science, information technology, and information security) plus one year of experience

- It is not necessary to be a member of AIIM to take the exam
The exam is available from Prometric test centers across the world and costs $265 USD.

You have 2 hours to answer 100 multiple choice questions.

You must score 560 (70%) or higher to pass the exam.

Upon completion, you will immediately receive the exam score report from the test center.

Upon passing, within 3-4 weeks, you will receive an email from AIIM that will include a link to access and download your Certification credentials and certificate and the Certified Information Professional logo.

For more information: [http://www.aiim.org/Training/Certification/Get-Certified#sthash.AU7xEFgG.dpuf](http://www.aiim.org/Training/Certification/Get-Certified#sthash.AU7xEFgG.dpuf)
Maintenance

To maintain certification, you will be required to recertify every three (3) years through one of two methods:

1. Retake the exam - the exam is updated on a regular basis (if you follow this route you will be required to pay the current exam fee at the time of the retest)

2. Take (and submit) 45 Continuing Education Units (CEUs) over a three-year period
Certified Document Imaging Architect

First global standard of competency and professionalism in the document imaging/records management industry

Validates a professional’s level of expertise in the technologies and best practices used to plan, design and specify a enterprise content system
Eligibility Requirements

- There are no eligibility requirements for this examination.
- It is recommended that you have at least 2 years of relevant work experience.
Skills and knowledge measured by the exam are consistent with those of a professional with at least 24 months of on-the-job experience.

The exam is 100 questions and you are allowed 90 minutes.

A passing score is 700 (on a scale of 100-900).

Exams are provided at Pearson VUE testing centers.

The cost is $293 USD.

For more information: [http://certification.comptia.org/getCertified/certifications/cdia.aspx](http://certification.comptia.org/getCertified/certifications/cdia.aspx)
Maintenance

- Maintenance is not required.
Certified Information Privacy Professional

Five options: US, Canada, Europe, US Government

We will focus on CIPP/US

The CIPP/US credential demonstrates a strong foundation in U.S. private-sector privacy laws and regulations and understanding of the legal requirements for the responsible transfer of sensitive personal data to/from the United States, the European Union and other jurisdictions
Domains

The U.S. Privacy Environment
Limits on Private Sector Collection and Use of Data
Government and Court Access to Private-sector Information
Workplace Privacy
State Privacy Laws
Eligibility Requirements

- You must become an International Association of Privacy Professionals (IAPP) member prior to testing.

- The Certification Foundation exam is required for all first-time certification candidates.

- You must also pass the CIPP/US designation exam, which layers over the Certification Foundation Exam, resulting in CIPP/US certification.
Certification Foundation Exam

- 90 minutes
- 90 multiple choice
- Scoring is scaled
- Each correct answer is worth one point
- Cost $275 USD

CIPP/US

- 70 minutes
- 60 multiple choice (ten of which are associated with scenarios
- Scoring is scaled
- Each correct answer is worth one point
- Cost $275 USD

For more information:
https://www.privacyassociation.org/certification/cipp_certification_programs
Once you have earned your credential, you must meet two minimum requirements to maintain your credentialed status:

1. You must keep your IAPP membership—at any level—in good standing each year

2. You must fulfill at least 10 hours of continuing privacy education (CPE) per year
Project Management Professional

Most important industry-recognized certification for project managers

Globally recognized and demanded

Demonstrates you have the experience, education and competency to lead and direct projects

Recognition is seen through increased salary according to PMI Project Management Salary Survey
Domains

- Initiating the project
- Planning the project
- Executing the project
- Monitoring and controlling the Project
- Closing the Project
Eligibility Requirements

OPTION 1

A secondary degree with at least 5 years of project management experience, with 7,500 hours leading and directing projects and 35 hours of project management education

OPTION 2

A four-year degree and at least 3 years of project management experience, with 4,500 hours leading and directing projects and 35 hours of project management education
The PMP® examination is a 200-question, multiple-choice test
You will have 4 hours to complete the exam
You can take the test online or at a Prometric location
Scoring is scaled
Online cost for the exam is $405 USD ($555 USD non-member)
Prometric cost is $250 USD ($400 USD non-member)

For more information:  www.pmi.org
PMP credential holder will need to earn 60 PDUs per three-year cycle
Certified Records Manager

The CRM credential provides a strong foundation of core skills and competencies for the RIM professional, covering everything from general management principles, all aspects of recordkeeping from creation, management, control, storage and disposition, through in-depth areas of recordkeeping technologies.

In addition, the CRM credential demonstrates your ability to apply and convey your knowledge to upper management, clients and other constituents.
Domains

Management Principles and the Records and Information (RIM) Program

Records and Information: Creation and Use

Records Systems, Storage and Retrieval

Records Appraisal, Retention, Protection and Disposition

Technology

Case Study
Eligibility Requirements

- The minimum qualifications for applying for the CRM are a college degree (four-year or bachelor’s degree) and one year of professional Records and Information Management (RIM) experience.

- One additional year of professional RIM experience may be substituted for each year of college (i.e. a high-school graduate with 5 years of professional RIM experience could apply).

- The minimum acceptable education is graduation from high school (completion of 12 grades) or equivalent (e.g. GED Certificate).

- Applicants must have at least one year of professional Records and Information Management (RIM) experience.

- Application fee: $100 USD
The six-part examination is divided into:

- Part I – Management Principles and the Records and Information (RIM) Program
- Part II – Records and Information: Creation and Use
- Part III – Records Systems, Storage and Retrieval
- Part IV – Records Appraisal, Retention, Protection and Disposition
- Part V – Technology
- Part VI – Case Studies

Parts I to V each consist of 100 multiple-choice questions and are $100 USD each; Part VI consists of two 50 point case studies, each of which require an essay response, and is $150 USD.

The passing score for each exam is 70%.

You must pass Parts I – V before being eligible to take Part VI.

Exams are conducted at a Pearson VUE testing center, which has over 4,000 independent third-party testing centers worldwide.

For more information:  [www.icrm.org](http://www.icrm.org)
The maintenance cycle is 5 years.

One hundred (100) “contact” hours of approved educational activity are required during each five-year period following initial Certification.

For more information: www.icrm.org
Information Governance Professional
Strategic thinker
Knows the ins and outs of his/her organization and its expectations.
Knows when to drive out excess cost, mitigate risk according to tolerance level and when to actively use information for its business value
Highly touted and respected person in the organization
Domains

- Managing Information Risk and Compliance
- Developing IG Strategic Plan
- Developing IG Framework
- Establishing the IG Program
- Establishing IG Business Integration and Oversight
- Aligning Technology with the IG Framework
Eligibility Requirements

OPTION 1

- Four-year degree
- Minimum three years of management or leadership experience in any of the following fields: RIM, law, compliance, audit, IT, privacy, or security
- Experience must include management of staff or overseeing the direction of work of a department, organization, function, or major project or initiative related to one of the fields above

OPTION 2

- Secondary degree
- Minimum 6 years of management of leadership experience in any of the following fields: RIM, law, compliance, audit, IT, privacy, or security
- Experience must include management of staff or overseeing the direction of work of a department, organization, function, or major project or initiative related to one of the fields above
140 multiple-choice question
2 hours and 45 minutes
Exam can be taken Fall/Spring at Pearson Vue locations
Cost is USD $599
For more information: http://www.arma.org/r2/igp-certification
Certification is awarded for a three-year period

- 60 contact hours in a 3-year cycle (this averages 20 hours/year - which is comparable to the ICRM's 100 hours in a 5-year cycle)

- 10 hours required in legal; 10 hours required in IT - remaining 40 hours are at the individual's discretion. Legal and IT change more rapidly than the other areas, so a minimum amount of continuing education is required
AIIM Certificate Courses

Business Process Management
Enterprise Content Management
Information Governance
Managing Records & eDiscovery in SharePoint 2013
Taxonomy & Metadata
Electronic Records Management
<table>
<thead>
<tr>
<th>Essentials of RIM (Records and Information Management) Certificate</th>
<th>Essentials of the Generally Accepted Recordkeeping Principles Certificate</th>
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<tr>
<td>Professional Leadership Certificate</td>
<td>Essentials of Information Governance Certificate</td>
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Optismo Certificate Courses

- SharePoint Information Management Fundamentals
- Best Practices in Solving Info Management Challenges
- CIP Prep Course
- Communication & Public Speaking
- IG & Records Management in SharePoint
- Information Governance

www.optismo.com/education
Have You Decided?
THANK YOU FOR ATTENDING.

ANY QUESTIONS?

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