



NEW YORK ASSOCIATION OF LOCAL
GOVERNMENT RECORDS OFFICERS

NETWORK

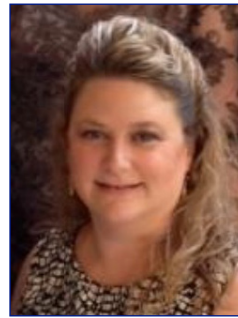
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Spring 2023

President's Message

April is Records and Information Management Month!

April is the time to move your records management program to the top of the priority list. In my office we focus on a specific project to accomplish. This year we are scanning all of our dog licenses into our electronic documents records management system so that we can get rid of the paper. This will also make it easier to purge with an easy click of a button when the retention period is over. Share what you are doing to highlight records management this month on our Facebook® page.



Changes to your NYALGRO Board

We have had some changes to the Board over the past few months. Louisa Ingrassia, Town of Wallkill Town Clerk has stepped down as Secretary. She promises to still attend the conference so we will all still be able to see her friendly face. Colleen Rathbun, Town of Queensbury First Deputy Town Clerk, was appointed to finish Louisa's term as Secretary. Megan Sokolow, County of Livingston Records Inventory Supervisor, was appointed to the seat formerly held by Colleen. Welcome Megan! Have you ever wondered what being on the Board means or what goes into planning a conference? Please reach out if you want to learn more!

2023 Conference—Ithaca

By now you should have received your conference registration packet. A lot of effort goes into organizing a conference and the pressure to offer a substantial education program is a huge responsibility. We hope you plan to attend and are as excited as we are! If you have come to a NYALGRO conference before you know there are fun activities planned and secret opportunities to win some amazing prizes. We have some great events planned and excellent opportunities to network with others in our field! Please reach out if you have any questions.

We are on Facebook®—Check us out

We try to be available to our members as much as possible and social media is a great way to reach many fast. Please follow us on Facebook®. We post all kinds of information as well as some "secret" conference games that you can only know about if you follow us.

I am really looking forward to seeing everyone in June! Please feel free to call me anytime if you have any questions or just want to say hi. We are here for you!

—Desiree Potvin, President
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Records Management

Summer is just around the corner, and as April is just about over, we are wrapping up another National Records Management Month! As RMO, this is the time you can start to get your fellow staff members on board with records management tasks. While many of our fellow colleagues may find file maintenance to be a challenging and tedious process, we as RMOs are here to help! Let them know that now is the perfect time to sort and begin the

disposal process of many records that have been in storage, or perhaps located in various departments in your building. It's easy to bring your colleagues up to speed by sending out a weekly email letting them know that if they have files, maps, boxes, etc. in their possession which they are not sure what to do with, you'll be happy to help them sort through items for proper retention.

File Management 101:

Pick a Scheme and Stick to it.

One of the bizarre and damaging assumptions that records management professionals sometimes make out in the wild is that everyone knows how to file correctly. We tell staff things like "Box records together by records series," "Box the records in order," or "Don't mix retentions in a box." But sometimes, the reality is that the records aren't organized in the office in a way that makes any of those guidelines easy to manage.

Another doozy I have said a few times is, "Organize your Local Area Network (LAN) folder structure like they are filing cabinet drawers." I was puzzled when people followed up with the question, "How should I be organizing my filing cabinet drawers?" It's not that I knew how to or have magical filing genetics. I just assumed that if you worked in an office, you knew how to file; the local government office staff would know how to do that.

Well, they often don't. And, after a recent conversation with the department head of a local office administration college program, I learned that they don't teach that stuff anymore.

So, what's a records manager to do when you keep getting boxes filled with things that are permanent retention mixed in with working documents, invoices, and timecards? You learn how to file so that you can tell your cohort how to file when that is what they need.

Trust me when I say this, good filing fixes many of the biggest records management offenses in a way that causes cascading positive effects, cost savings, and greater efficiency.

That said, what are the core steps of quality filing?

#1: Analyze your records and determine their primary identifiers, such as client ID, Name, Dates, Program Types, Case Number, or Street Address.

#2: Select the most common identifier for a filing scheme. (What identifiers do all the records in the series contain? Is the Identifier unique for each document?)

#3: Divide files into sections for access efficiency and easier disposition. (ex. Capital Improvement Project Files would have separate sections for supporting documents with shorter retentions.)

#4: Stick to the scheme consistently.

The first thing we want to see as records managers are that records are in "order," but putting things in order can mean different things for different types of records.

There are four primary ways that files can be put in order; Alphabetically, Numerically, Chronologically, or Alphanumerically.

- Alphabetically filed documents tend to be indexed using the last name and first name schema. This scheme is common for Human Resources records, especially for active files.
- Numerical filing is often seen when records are located by ID numbers, such as a Client ID, a case number, or an incident number.
- Chronological records are typically those that log events or activities occurring across time, such as requests for service, Daily Cash Logs, or transaction registers.
- Alphanumeric records often reflect several program types with client identification numbers or records organized by Street addresses.

Determining which of the four filing methods is best for the records and sticking to that consistently makes a difference. It makes it possible for a new staff member to understand how files are arranged quickly, find needed files, and know how to return documents to the right file folder.

Another benefit of quality filing is that it promotes greater success once the records are being stored digitally instead. When your file drawers reflect a specific scheme, replicating the scheme in a digital filing plan is simple. A drawer of Case Files organized by year and case ID number would logically be stored in a content management system as the file path CaseFiles\Year\YYYY_[Case ID Number.] It seems quite simple, but a disorganized filing method always throws curveballs into content management file plans. If you have a drawer full of Capital Improvement Project files with supporting documents mixed in, you will spend more time determining how to name the file and apply appropriate cutoff dates for retention. Later, it will take more time to find that one invoice for the thingy.

I have spent much time getting wrapped up in the heady, technologically advanced future of records management. Still, sometimes it's the basic stuff that people always "just knew" that we need to revisit to build the greatest success for our programs.

News From the New York State Archives

—Dave Lowry

State Archivist, Thomas Ruller, retired at the end of February. A search for a new State Archivist has begun, and we hope to have a new archivist in place by the end of 2023.

April is National Records Management Month, and the State Archives is celebrating. Check out our social media feeds where we have posts everyday providing advice on how to improve your records management program. We are also celebrating with one of our Ask Us Anything webinars. This one is on April 26 and the topic is records inventories so come ready with your questions!

There are some other great training opportunities including one on May 10 about using project management techniques to manage your archives and records management projects. Records Facilities Management for Your Organization on May 24 will provide advice on how to run a records storage facility and on June 28 we will present a new webinar on information governance. You can register on our website.

We will also be providing training at the New York Association of Town Clerks annual conference in Syracuse starting April 23. If you're a town clerk, please visit our booth say hi.





New York Association of Local Government Records Officers



New York Association of Local Government Records Officers (NYALGRO) RECORDS MANAGEMENT CONFERENCE JUNE 4-7, 2023 – HOTEL ITHACA

The Board of NYALGRO would like to offer you the chance to exhibit your products or services for use in records management. Representatives from counties, towns, villages, schools, fire districts, and cooperative extensions attend the NYALGRO School to learn about the latest technology and find solutions to their records management problems. Find new customers and connect with key players in records management. Learn about current records management needs from the customer. This is an exceptional opportunity to show off your products and promote your expertise to records professionals across the state all in one location.

Conference Details

When: **June 4-7, 2023**

Where: **HOTEL ITHACA, 222 S Cayuga St, Ithaca, NY 14850**

(607) 272-1000, <https://www.thehotelithaca.com/>

You will be formally introduced during the conference luncheon on Monday, June 5. Your company logo will appear in the NYALGRO "Network" newsletter that reaches over 500 people statewide, and we acknowledge exhibitors on our website: www.nyalgro.org. Exhibitors include a six-foot skirted table, internet, complimentary conference registration, and two lunch tickets.

Yes, we will participate as Corporate Sponsor at the 2023 NYALGRO Conference, which includes a table at the conference, Facebook recognition, and your logo in the quarterly newsletter for \$350.

We cannot attend the conference, but would like to advertise in the quarterly newsletter for \$200.

Company Name: _____

Vendor email: _____ **We will sponsor a coffee hour for an additional \$125.**

Address: _____ **We will sponsor the Welcome/President's Reception for \$250.**

Please return this section with a check made payable to "NYALGRO" to Dina Falcone, Town Clerk, Town of Lysander, 8220 Loop Road, Baldwinsville, NY 13027. Payment must be received by May 3, 2023.

Email or call with any questions (315) 638-0224 (townclerk@townoflysander.org)

- We would like to be part of the "Giveaway Day" and give a prize at the conference.
- We require electricity for the exhibit.



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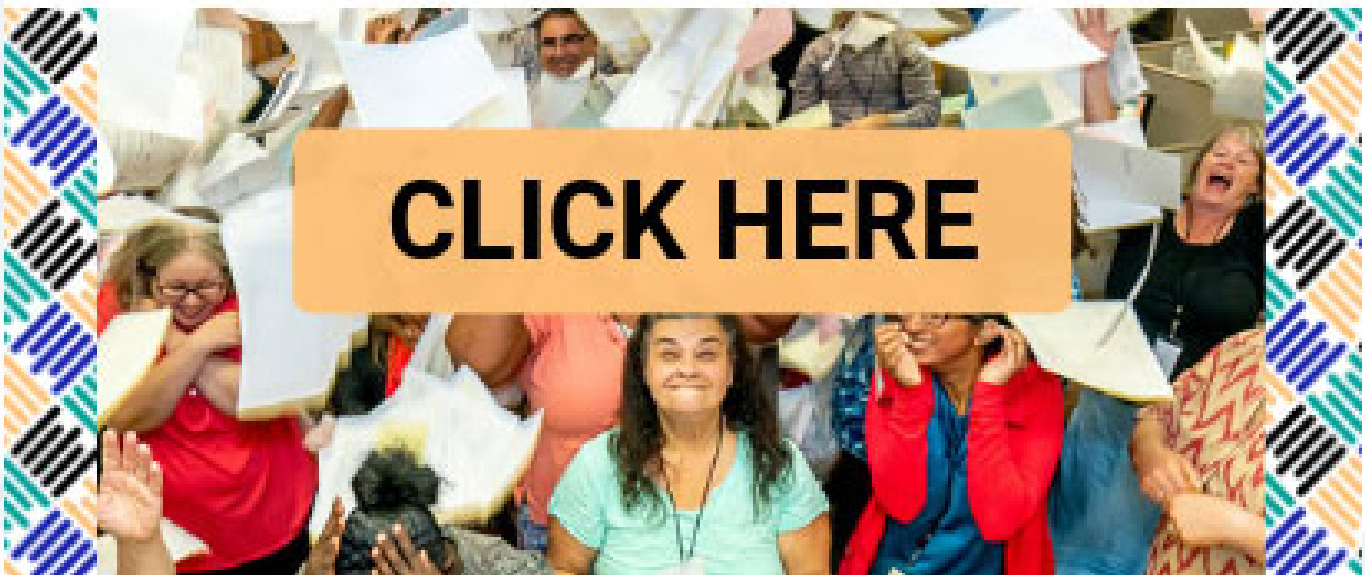
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