



NEW YORK ASSOCIATION OF LOCAL
GOVERNMENT RECORDS OFFICERS

NETWORK

www.nyalgro.org

Summer 2023

President's Message



Conference Recap

WOW, did everyone have as much fun at the 2023 conference as I did? I hope all that attended felt welcomed and plan to return next year. I enjoyed meeting all of you. A special shout out to the four SCHOOL DISTRICT clerks. So happy to have school districts represented!

To our Vendors: a special thank you for attending - without you our conference would not be a success. Special thanks to our coffee hour sponsor Absolute Auctions & Realty, our President's Welcome Reception sponsor eBizDocs, Inc. and our after-banquet game night/cocktail party sponsor, Dennis from IQS.

To our Speakers: thank you for making time in your schedule to come help us improve and learn.

To the Board members: the twelve of you are amazing and I am honored to serve with you.

Planning for 2024 Conference

In late September the Board will be meeting to plan the agenda for the June 2024 conference, which will be held at the Riveredge in Alexandria Bay. We received a lot of input on the conference surveys that we will be using to create a great educational schedule for you. If you have any suggestions for class topics, please email them to me at nyalgro2020@gmail.com. Your input is appreciated and essential to making the conference great!

Follow us on Facebook®

We put a lot of information on our Facebook®, including secret challenges held during the conference to win a prize! Please take a moment and check it out.

Please feel free to call me at any time if you have any questions about NYALGRO or just to say hi! 845-928-6829 x7.

—Desiree Potvin, President
nyalgro2020@gmail.com
845-928-6829 x1221



Desiree Potvin
President

Karen M. Sweeting
Vice President

Rosemary Switzer
Treasurer/Co-Editor

Colleen Rathbun
Secretary

Jessica McClennan
Member

Dina Falcone
Member

Kerriann Harrington
Member

Wendy McConkey
NYALGRO Website

June Patterson
Member

Megan Sokolow
Member

Matthew Shaler
Member

Dave Lowry
NYSED Liaison to Board

Gina Doty
Emeriti

Donna M. Mumbulo
Immediate Past President



Updates From the State Archives

—Dave Lowry

The State Archives has started posting training events for the second half of 2023. In July we'll have training on managing case files, a topic we've not covered in a while. If you use case files this is the perfect webinar for you. On September 27, you can learn How to Process and Purge Inactive Records. On November 8 is an updated version of Managing Social Media Records followed on December 13 with an updated Digital Imaging webinar. To celebrate Archives Month, on October 18 we'll be presenting one of

our popular "Ask Us Anything" webinars. The subject for this one is: Electronic Records Storage. You can register for these webinars on our website.

We continue to update our publications too. We will be releasing a major update to the Developing a Policy for Managing Email publication soon. Also, we have a new advisory in the works on Legal Discovery. This publication will explain the legal discovery process and how it can affect your records management program.

Everything has a Place, and a Name, and I Can Find it

In the past few months, I have had the opportunity to visit several Town and Village records rooms. Every time I visit another one, I discover a new and usually effective way of storing boxes. Some places have great organization systems, and others do not. Sometimes there's a new clerk or Mayor, and they have no idea what they are inheriting, other times, a new person can walk in there and understand what's happening right away.

Ideally, when we create a system for housing our records, we have one of the latter. But, how do we make that happen or verify that our system is effective?

Here are some key rules of thumb, and don't think these are from my brain only, these are all taken from one of the many free Records management guide publications on the NYS Archives website.

#1: Birds of a feather flock together.

Keep documents in boxes with documents that serve the same business function and can be disposed of at the same time.

#2: Use a Label that gives you the details on the box

NYS Archives has a sample box label available on their forms and tools list. BUT, if you are wanting the basics, your boxes should be legibly labeled with the following key pieces of information

- Records Series
- Dates
- Department
- Unique box ID

#3: Make an accessible list of what you have

What this means is to make a spreadsheet, or database or use collection management software to keep a list of what box numbers you have and what is in them. For most municipalities, an Excel spreadsheet is perfect.

You'll want whatever method you choose to have the following categories:

- Unique box ID Number
- Shelf Place Number
- Records Series
- Dates
- Department
- LGS
- 1 Number or OCA number
- Destroy Eligibility Date
- Notes Field (This allows you to add relevant details like what range of records are in the box like A-L last names etc.)

#4: Map out your room by assigning every spot a box can sit a place number.

When you put a box on a shelf, if the shelf spot has a number, you can record that number in the spreadsheet you have made, so that when you go looking for the box, you know where it should be.

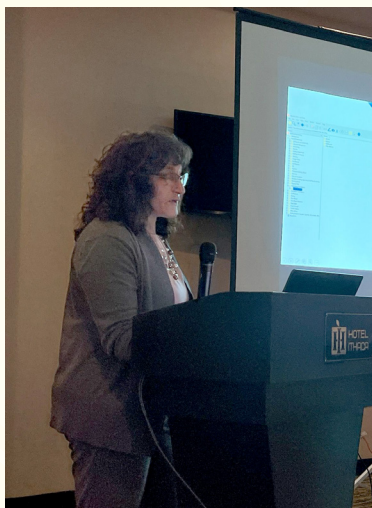
When you have all the places identified, that helps you know where things are, how much room you still have, and it makes it possible for a person to pull boxes for destruction or transfer with a list of numbers that can be quickly found.

Creating a system that will be easy to access for the future is not a "snap your fingers" or "twich your nose" type of magic, but it can usually be accomplished within a couple of days, believe it or not. You'll never regret time spent making future "you" have an easier system to manage, that I can safely promise.

Megan M. Sokolow
Records Inventory Supervisor
Livingston County, New York

Comments from Conference Surveys

- “Everything was Excellent”
- “I felt welcomed which made the whole experience good”
- “All presenters-well done and great exchange”
- “I love hearing what others are doing and how I can apply to our office”
- “I have no complaints with all conferences I’ve attended, NYALGRO maintains great and useful sessions and activities”
- “Keep up the good work: It is a great you change location every year”





HENDERSON | JOHNSON
Where great buildings come together.



New York State Archives