



NEW YORK ASSOCIATION OF LOCAL
GOVERNMENT RECORDS OFFICERS

NETWORK

www.nyalgro.org

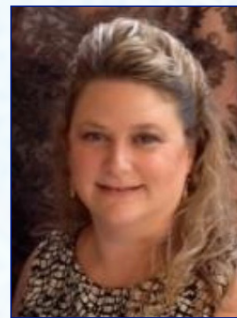
Winter 2024

President's Message

Happy New Year to all of you!

Changes to the Board

Thank you to all that voted in our electronic ballot process in November. All seats were uncontested, and I would like to congratulate the following individuals that were re-elected to your Board of Directors: Colleen Rathbun as Secretary, Jessica McClennan, Megan Sokolow and Nichole Doherty as Board Members. Sadly, we had a resignation after our last conference, Wendy McConkey has decided to retire to spend time with her new grandchild. We thank Wendy for her many years of service and hope to see her at future conferences. The Board appointed Jamie Nizol, District Clerk/Secretary to the Superintendent Attica Central School District, to Wendy's seat. We are very excited to have a school district represented on the Board and I know Jamie will bring great things to our organization.



Updated Website

Special thanks to Board members Matt and Kerriann for the redesigned/updated website for our association. It looks amazing. I encourage you all to check it out. It has a lot of past education materials and information about upcoming educational opportunities.

2024 Conference – Alexandria Bay

This year the conference will be back at the Riveredge Resort Hotel in Alexandria Bay June 9-12. Conference packets will be mailed the last week of March. Packets will also be available on our website – www.nyalgro.org

Do you need a scholarship?

The cost for the conference this year will be \$520.80 (Sunday through Tuesday). If your employer cannot budget for schooling, please consider applying for one of our scholarships. Applications are available on our website www.nyalgro.org or email nyalgro2020@gmail.com.

Do you have a records success story?

We are still looking for members to share their success stories on how they have conquered their records management problems. Please submit your story to us and we will feature you in an upcoming newsletter. Send photos too if you would like! Email nyalgro2020@gmail.com and in the subject field type "success story." Maybe your success will help someone else improve their workload!

I hope to see everyone at the conference 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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Member

Dina Falcone
Member

Jamie Nizol
Member

June Patterson
Member

Megan Sokolow
Member

Dave Lowry
NYSED Liaison to Board

Gina Doty
Emeriti

Donna M. Mumbulo
Immediate Past President



Mentor/Mentee Program

Matt Shaler at matthew.shaler@madisoncounty.ny.gov.

As a reminder, the purpose of this program is to pair a newer records manager with a more veteran one. That way you have another person to bounce ideas off of, ask questions, etc. I was very purposeful with pairing folks who are from the same level of municipality and as close geographically as possible. Please contact me if you have any questions. Thanks!

Do you need a scholarship?

Registration for our conference is only \$30. We try very hard to negotiate costs with hotels for overnight attendees to be as low as possible. If you are unable to budget this expense with your employer, please consider applying for a scholarship. Applications are available on our website www.nyalgro.org. We also posted an application in the newsletter.

Executive Board Election Results

Congratulations to the members re-elected to the Board. They will serve two years.

Colleen Rathbun as Secretary,
Jessica McClennan, Megan Sokolow and Nichole Doherty as Board Members

Thanks for all who voted!

Appraisal

Appraisal: What is it, Why do I do it, When do I do it, and How Often?

Appraisal can be an intimidating term. I usually picture insurance agencies when I first hear the term appraisal or long-lost works of art. However, in the records management sphere, it is not so lofty.

In the context of the office, appraisal has two purposes.

- #1: To identify what a record is so we know how to classify it
- #2: To discover if a record needs a specific type of care

For records managers, appraisal is the process of examining a series of records to meet those two objectives. We need to identify these details about a record so that we can obey the records laws and so that we do not end up keeping tons of boxes for longer than we need to.

Of course, there is a lot that goes into those two tasks. To identify a record and classify it, we need to discover its business purpose, and what value, if any, it has for fiscal, legal, or administrative purposes, and then assign the appropriate retention schedule item number to it.

The next part is the care a record needs to last for the entire length of its retention period. Therefore, that means deciding whether it needs to be stored in a long-term storage environment or maybe digitally preserved. You may also note that a record needs some added care or repair.

I am guessing you are thinking, I do that all the time, or maybe you are very familiar with these tasks and struggle to find the time. So, when do we need to do an appraisal? Well, I can tell you that no one has the time to go back and check all the records later; that's an inventory! It's really best to look at your overall processes and identify what records your team creates during business, then apply broad strategies to that entire set of records.

Appraisal is also valuable for the records that don't fit the routine processes that you do all the time, and there's a good chance when those records occur, you'll be thrown off your normal schedule. That's a signal that you might need to spend a moment answering the two purposes above.

What about the traditional idea of appraisal being about historical value? These are unique to your knowledge moments. Only you and your team can tell if a records series or set of documents will someday be historically valuable. There are tips in the LGS-1 to tip you off to possible historical value, which you can lean on, but your knowledge of the day-to-day work will alert you to the extraordinary.

Don't forget that you are a part of history in your role in government and that the decisions your team is making are shaping the future of your organization.

Interested in a 2024-2025 LGRMIF Grant?

—Dave Lowry

If you're interested in applying for a 2024-2025 Local Government Records Management Improvement Fund grant you will have to March 11, 2024 to apply. The State Archives egrants system is now open. Please note you must submit your application by 5:00 p.m. on the 11th.

You may apply for funds to reformat records to digital images or microfilm, address problems with your inactive records storage, create new filing systems for your active records, create a disaster plan, or address various other records management problems.

You may apply for an individual grant with a maximum award of \$75,000 or work with another local government or governments on a shared services grant with a \$150,000 maximum award. You may only apply for one grant and

cannot submit an individual application and participate in a shared services grant. You may, however, apply for a second grant in the disaster management category but these grants have a \$10,000 maximum award.

If you are interested in applying, contact your Records Advisory Officer (RAO) (<https://www.archives.nysed.gov/about/about-contact-local-government-advisory-services>)

Also, check out our recorded grants webinar which will help you navigate through the process. (<https://www.archives.nysed.gov/workshops/webinars>). Once you navigate to the workshop webpage, choose LGRMIF Grant Program as the topic.

If you decide to apply, good luck!

Register for our 2024 conference

Join us at the beautiful Riveredge Resort Hotel in Alexandria Bay, Thousand Islands on June 9-12, 2024.

The classes will be informative yet informal and relaxed. The topics will touch on many aspects of record management such as: Devising policy and procedures; how to set up a records center on a budget; social media and electronic records; grant reviews and other such pertinent subjects.

The conference is a perfect setting for networking and meeting other people who work in your field.

Come join us! We would love to see you there.





CHERYL STEINBACH MEMORIAL SCHOLARSHIP Application

This annual scholarship was established in honor of Cheryl Steinbach who was the Town Clerk and RMO for the Town of Chautauqua, and past Treasurer and NYALGRO board member. Cheryl's commitment and dedication to records management issues provided a leadership example for all public servants, not just those involved in records management. NYALGRO will award two (2) scholarships, not to exceed \$500.00 per award, toward the total cost of the NYALGRO school registration and hotel accommodations (*travel expenses not included*).

Complete the application below and attach a brief explanation stating why you should be considered for a scholarship, what you hope to accomplish and/or learn, and how this will benefit you in the future.

Award Criteria

- Applicant must be a member of NYALGRO and be in good standing by May 1st of each year.
- Applicant's government/agency will not be assuming the cost of expenses at the annual NYALGRO School.
- Applicant must NOT have been a Cheryl Steinbach Scholarship Award recipient with the last five (5) years.
- Deadline for submissions is May 1st of each year.

A panel of NYALGRO board members will review all applications and make recommendations to the full Board for approval. Applicants awarded scholarships will be notified as soon as possible, and the scholarships will be presented at the annual school. Your attendance is required.

Name _____ Title _____
 Government/Agency _____
 Address _____
 Phone # _____ Email _____
 Years in Records Management _____ Signature _____

Department Head/Elected Official Authorization

By signing below I authorize that the expenses at the annual NYALGRO School by the above named individual will NOT be paid by the government/agency. I support this application.

Print Name Title

Signature Date

Please email completed application to: Desiree Potvin, President
 NYALGRO Scholarship & Award Committee Chair
 Email: nyalgro2020@gmail.com



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