



NEW YORK ASSOCIATION OF LOCAL
GOVERNMENT RECORDS OFFICERS

NETWORK

www.nyalgro.org

Spring 2015

President's Message



I hope you have all been enjoying your winter and have been able to shovel yourselves out of the snow that has hit hard in some areas of the State. Your Board members have been working to plan an exciting and educational 2015 School in beautiful Lake George, New York on June 7-9, 2015. Our theme this year will be "Riding the Records Rollercoaster" and we have some great courses planned that will give you plenty of opportunity to interact with others in your field. We will once again be at the Holiday Inn so save room in your bellies for those cookies (and please stop me from eating so many this time).

I would like to congratulate Michele Rowe, your new Vice President, and Rosemary Switzer, your new Treasurer. Both will do an excellent job with these new responsibilities. I would also like to welcome your new Board members: June Patterson, Town Clerk of the Town of Highlands; Robin Morse, RMO of the West Endicott Fire District; A. Dianne Muscoreil, First Deputy Town Clerk of the Town of Wilson; Jessica McClennan, Deputy Village Clerk of the Village of Woodbury; Lillian Barton, RMO for the St. Regis Mohawk Tribe; and Karen Sweeting, Town Clerk of the Town of Sweden. All of these individuals have brought great enthusiasm to the Board so far and I am really excited to work with each of them! Please take a moment to review their biographies in this newsletter. I would also like to take a moment to thank the Board members that have left us this year to pursue other opportunities in their professional life or to move on to the next stages of their lives in retirement: Yvonne Deligato, Binghamton University Archivist; Kathy Walruth, RM Director Schuyler County; and Carol Davidson, RMO Seldon Fire District. I would also like to welcome Dave Lowry as our new State Archives Liaison and thank Geof Huth for filling this role over the past few years.

Last, but certainly not least, I would like to thank Donna Mumbulo for her many years serving as President of this great organization. She will now assume the role of "Immediate Past President" and will be a wealth of knowledge and assistance to me and the Board. I thank her greatly for the guidance she has provided and the knowledge she has imparted.

In closing, I look forward to meeting new members and catching up with existing members at the School in June. Please be sure to come up to me and say hi, grab that cookie out of my hand, and talk about everything and anything. Please also consider applying for a scholarship if your employer cannot financially support your continued education. We try very hard to keep the cost of the school below \$500. Scholarship applications are available on our website and more information is contained in this newsletter. Please feel free to call me at any time—I am here for all of you, 845-928-6829, ext. 7.

—Desiree Potvin, President



Desiree Potvin
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Vice President

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Secretary

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June Patterson
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Peter J. Scheibner
Member

Karen M. Sweeting
Member

Dave Lowry
NYSED Liaison to Board

James Tamaro, MLS
Emeriti

Donna M. Mumbulo
Immediate Past President



Five Ways to Build Support

Establishing and operating an effective records management program can be a low-priority item in many organizations. This is often the case with local governments in New York State. Therefore, once a records management program is established in a local government, it is crucial for the local government's records management officer (RMO) to take the initiative in building on-going support for the records management program to get the resources needed to adequately manage the local government's records.

This article will explore five ways a local government RMO could build support for the government's records management program. The methods for building that should be applicable to any local government in New York State regardless of size. The ways to build support include:

1. Documenting current conditions and improvements with photographs—It is often said “one picture is worth a thousand words,” so before establishing the local government records management program or before taking new records management initiatives, take black and white photographs of the existing conditions. These photographs will graphically illustrate the current situation with respect to the government's records. After improvements have been made in how the government's records are being managed, take colored photographs of documenting those improvements. The before and after photographs can be the basis of a slide show illustrating the improvements which have been made. That slide show can be presented to the government's legislative body and other interested individuals to familiarize them with the improvements that have been made.
2. Establishing a records advisory board—The RMO can establish a records advisory board. The Board should consist of individuals within and outside the local government to guarantee proper input from “key people” inside and out of the government as the records management program is established and enhanced. The Board can also serve as a means to establish a broader base of support for the program as enhancements are made to it. The RMO should serve as chair of the Board. Other Board members might be the local government's bookkeeper, accountant or comptroller, and attorney in addition to a member of the government's legislative body and local historian. These days, with the great increase in the use of electronic records, appointing the government's information technology person to the Board might have a lot of merit.
3. Identifying a “champion” from the legislative body—The RMO should identify someone who is on the government's legislative body who is interested in being a big supporter of the government's records management program. The individual may be someone who has a special interest in managing the government's records more efficiently or who is interested in supporting the greater use of “new” technologies such as digitizing some of the government's paper records, etc. The RMO should nurture the interest by this person by making it clear to him or her that if improvements are made in the records management program, the “champion” will get most of the credit.
4. Doing a study of current conditions—Often, the government's legislative body will be supportive of conducting a study of current conditions regarding some aspect of managing the government's records before they approve the implementation of improvements in the government's records management program. Therefore, the RMO could propose a study to identify activities or operations which could be improved with enhancements to the government's records management program. The end product of the study should be a report which carries a series of recommendations for implementing various improvements or enhancements to the government's records management program. The recommendations should come with cost-effectiveness justifications or an explanation of other benefits associated with the recommended improvements.
5. Documenting everything!—As the records management program is being established, document all the activities carried out and continue to document these activities as the program matures. Activities to document might include:
 - a. The disposal of records—use a records disposal form to document how many cubic feet of records have been disposed of which have met their legal retention period;
 - b. The transfer of records to storage—use a records transfer form to document how many cubic feet of records have been moved from offices to an inactive records storage area;
 - c. The number of requests for inactive records—use a records request form to document how many records were requested from the local government's inactive records storage area; and
 - d. The use of technologies associated with the records—keep track of how many cubic feet of records were scanned or, in some cases, microfilmed and/or other technologies used in managing the local government's records, such as a software program to develop an automated locator system for government's inactive records

The statistics produced through the above documentation can then be incorporated into an annual report to the government's legislative body to reinforce the benefits associated with operating a records management program.

On-going maintenance of a local government's records management program requires on-going support. Hopefully, one or more of the activities recommended in this article will assist local government RMOs in New York State in building support for their government's records management program.

About the author: Mr. Tammaro serves as an adjunct professor at the SUNY at Buffalo, where he teaches graduate-level courses on records management and managing archival records. He is a member of the NYALGRO Board.

—James M. Tammaro, Adjunct Professor, SUNY Buffalo,
Dept. of Library and Information Studies

Networking Helps Keep my Sanity

I have spent quite a bit of time trying to come up subject matter to write an article about and when I almost threw in the towel, I thought, write from your heart. For over eight years I have been the RMO at my college campus and learn more from other record managers than anything else.

The June NYALGRO school is where I meet colleagues I know well and make new friends to network with to help me stay motivated and excited in my career. Records management, if you have not noticed, keeps changing often. For over two years I have been heavily involved in a complex ERM (Electronic Records Management enterprise software system). I have relied on many NYALGRO members to assist me through the growing pains and keeping me stay resolute that my job is to ensure our campus retention policies are adhered to within a new electronic format.

The challenge I have found during the past two years is my lack of knowledge about computer information technology. We have experts on campus that know computer systems thoroughly, but sharpening my communication skills with IT staff about the records retention schedules has been my ongoing challenge. Many IT employees do not understand the work I do, but I have been working to change that, and basically it takes time.

Although I understand how to handle the life cycle of paper records, handling them within an electronic workflow between different departments has left me feeling at times like I'm a first grader in records management. Most departments have a higher volume of electronic files compared to any other medium, so they have been doing 'parts' of the retention schedule and not all of it. There are things to think about and questions to ask, but you don't know them until you are in the thick of setting up the ERM system. That has been the challenge for me. Having you all to contact about handling certain aspects of your ERM systems has been my saving grace at times.

If you are wavering on whether to attend the June 7-9 school in Lake George, please make sure you attend for the networking with other record managers. The workshop sessions have been carefully planned using your past school's feedback forms on what you want in 2015. On a selfish note, I want to see you again or meet you for the first time to learn something that may help me in my work. I look forward to meeting you at our June 2015 school.

—Gina Doty, NYALGRO Secretary

New! Eligible for LGRMIF Grants

On January 1st of this year and pursuant to Chapter 508 of the Laws of 2014, volunteer fire companies and voluntary ambulance services became eligible to apply for Local Government Records Management Improvement Fund (LGRMIF) grants.

However, since they're not local governments under the Local Government Records Law, they are not subject to the same eligibility requirements local governments must meet, such as appointing a RMO and adopting a retention schedule.

Volunteer fire and ambulance companies must apply as not-for-profit entities. This means they are required to register in the New York State Grants Gateway, <http://www.grantsreform.ny.gov/>, and complete the Vendor Pre-qualification process for their LGRMIF grant applications to be evaluated.

The State of New York has implemented a new statewide pre-qualification process (see <http://www.grantsreform.ny.gov/Grantees>) designed to facilitate prompt contracting for not-for-profit vendors. All not-for-profit vendors are required to pre-qualify prior to grant application. This includes all currently funded not-for-profit institutions that have already received an award and are in the middle of the program cycle. The pre-qualification must be completed by all not-for-profit institutions prior to application in order to receive an award under the LGRMIF request for applications.

Volunteer fire companies and voluntary ambulance services that intend to apply for LGRMIF grants are strongly encouraged to begin the prequalifying process as soon as possible in order to ensure their ability to participate in this funding opportunity.

Please note that emergency rescue services are neither local governments under the Local Government Records Law, nor covered by

Chapter 508 of the Laws of 2014. Consequently, they are not eligible to apply for LGRMIF grants.

For questions on eligibility, contact the Grants Administration Unit at 518-474-6926 or ARCHGRANTS@nysed.gov.



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Rockland County Receives Award

The New York State Archives and the Archives Partnership Trust have selected Rockland County to receive the 2014 William H. Kelly Annual Archives Award for Excellence in Local Government Archival Program Development. This award recognizes a local government for its overall development of a soundly administered archival program and advocacy in promoting the identification, protection, preservation and use of archival local government records.

The award was presented to County Clerk Paul Piperato and County Archivist Peter Scheibner at a luncheon ceremony at the Cultural Education Center in Albany, held recently. The award is named for William H. Kelly, the former Mayor of Asharoken in Suffolk County, an advocate for strengthening local government archival and records management programs.

For almost three decades Rockland County has been a leader in local government archives management. The county has long recognized the value of its archival records, which date back to 1798 and include 1,431 cubic feet of records including: 2,673 bound volumes; over 21,960 maps and drawings; 850 photographs; and over 6,000 rolls of microfilm. The county has preserved its valuable collection by storing all microfilm off-site under strict environmental controls and by ensuring the proper housing of all original documents.

The county goes to great lengths to make its collections accessible. Many records have been digitized and made available on-line, and kiosks with touchscreen computers have been placed throughout the county where residents can search many valuable historical records, such as naturalizations, marriage records, and wills.

“We are pleased to recognize Rockland County for their outstanding efforts to manage and preserve the records of local government,” said Interim State Archivist Thomas J. Ruller. “We commend all involved in this winning program and wish them continued success in the years ahead.”

The annual Archives Awards program recognizes outstanding efforts in archives and records management work in New York State by a broad range of individuals and organizations. A complete list of this year’s award recipients follows:

William Hoyt Annual Archives Award for Advocacy

Laura Chodos (Saratoga County)

Cheryl Steinbach Annual Archives Award for Excellence in Local Government Records Management

Tompkins County

William H. Kelly Annual Archives Award for Excellence in Local Government Archival Program Development

Rockland County

Excellence in State Agency Records Management Program Development

Office of the State Comptroller (Albany County)

Excellence in the Educational Use of Local Government Records by a Local Government

Madison County and Madison-Oneida BOCES

Excellence in Research Using the Holdings of the State Archives

Joseph F. Spillane, Department of History, University of Florida

Laura and Robert Chodos Award for Excellence in Student Research Using Historical Records, Grades 9-12

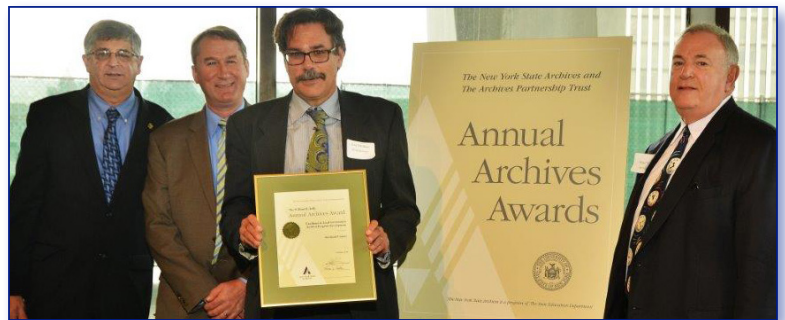
Olivia Chan, Townsend Harris High School at Queens College, Teacher: Franco Scardino (New York County)

Laura and Robert Chodos Award for Excellence in Student Research Using Historical Records, Grades 6-8

Ava Hornbliss, Ramaz Middle School, The Ramaz School, Teacher: Judy Sokolow (New York County)

Laura and Robert Chodos Award for Excellence in Student Research Using Historical Records, Grades 4-5

Jacobi Kandel, Murray Avenue School, Mamaroneck Union Free School District, Teacher: Pamela Tanenbaum (Westchester County)



Join NYALGRO!

Our members work at all levels of government:

Counties

School Districts

Cities

BOCES

Towns

Fire Districts

Villages

Businesses

Membership and Qualifications

Regular Membership—\$30 Annual Dues

Any individual holding or occupying a position involving local government records management.

Associate Membership—\$15 Annual Dues

Any individual interested in NYALGRO’s goals who does not qualify for other categories.

Corporate Membership—\$250 Annual Dues

Any business or business representative providing products or services for use in records management. Entitles holder to one free ads in our newsletter, a discount on a vendor’s table at our annual school, and a listing on our links page.

Newest Board Members

Lillian Barton, RMO-Saint Regis Mohawk Tribe



I have been with the Saint Regis Mohawk Tribe for almost 15 years. I was chosen as the RMO in 2008 to develop the records management program including implementation of a new electronic document management system. I am a certified database administrator for Hyland Software's OnBase®, as well as certified in Federal Records Management Training. I am a member of the Society of American Archivists and ARMA International. I am happily married to my husband Craig, we have two children and two grandchildren. We spend our time caring for rescued animals, including several chickens.

As a new RMO for the Tribe, my first major task was to develop the Tribe's records management processes from the ground up. This included writing policies and procedures, development of our own unique schedule, conducting an inventory of records, and one huge task of developing our inactive records storage areas, including coding and a retrieval system. Currently I am working on tweaking some problem areas, completing a disaster plan in conjunction with our emergency measures office, on-going training for employees and learning more about my new job duties as the Tribe's open records officer.

In 2009, I became familiar with NYALGRO through another RMO and became a member. In 2014 I ran for a board seat and was elected. I attended my first board meeting in January of 2015 and volunteered to be a part of the education/training committee. It is an honor to be a part of a growing association. I am looking forward to the upcoming NYALGRO School in Lake George and hope to meet and speak with many of the attendees.

Jessica McClennan, Deputy Village Clerk, Village of Woodbury



Hello, my name is Jessica McClennan, and I have recently been appointed as a board member of NYALGRO this year. I studied English, and History at Rockland Community College, and I am currently 31 years old. I was hired by Desiree, (the current president of NYALGRO) three years ago to catalog permanent documents, destroyed by hurricane Irene, while simultaneously working as a store manager in the Woodbury Commons. My past work experience as a manager in a busy retail establishment taught me very valuable lessons. The Human resources department generated a significant volume of records. It was my responsibility to receive and catalog the important records that had to be retained within the store on a daily basis. When I started working for Desiree the training I received from my previous job significantly helped me when it came to organizing what I was tasked to do. Working for the Village of Woodbury has taught me valuable insights on how to maintain permanent government records, and how to easily organize them in an efficient way so it is easier to access for future generations.

I have an amazing family, loyal friends, and a bunch of nieces and nephews that encompass my life. I love everything about the summer, especially going to the beach, thunder and lightning storms, fishing and

unplanned road trips. So far, I have enjoyed my life very much. I love taking chances, and being able to say, I have no regrets. Everything happens for a reason.

I look forward to the next two years on the board, where I intend to help others with the procedures and tactics, of executing the vast job of record management.

A. Diane Muscoreil, CMC, RMC 1st Deputy Town Clerk, Town of Wilson



I have always been an organized person, and when I was hired at the Town of Wilson, the Town Clerk showed me our Records Management Room and I felt right at home! I have more than 15 years of experience working with records management for the Town of Wilson, and have the pleasure of doing it all, from collecting the original documents to destroying them when their date comes due. I have been able to attend several NYALGRO conferences and found the information gained there to be very helpful in keeping all of the Town records in compliance.

June Patterson, Town Clerk/RMO, Town of Highlands



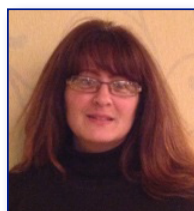
I am a 46 year resident of the Town of Highlands and I am the oldest of two children. I am the proud mother of two sons and the grandmother of two little girls.

I have worked for the Town of Highlands since 1989 when I was hired as the Secretary to the Recreation Director. In February 1994, I was appointed the full-time Deputy Town Clerk and then in 2006, after winning the election in 2005, I took over as the Town Clerk.

In 2013, I became the Vice President of the Highland Falls Fire Department Auxiliary and currently still hold this position.

I am a member of the Orange Sullivan Town Clerk's Association and the New York State Town Clerk's Association. I received my Registered Municipal Clerk certification from the NYS Town Clerk's Association in 2011. I've attended the NYS Town Clerk's conference every year since becoming Town Clerk and have attended the NYALGRO conferences for the last three years.

Karen M. Sweeting, Sweden Town Clerk



Karen M. Sweeting was appointed the Sweden Town Clerk in 2004 after serving the Town in the capacities of Court Clerk and Tax Receiver beginning in 1996. She belongs to several organizations at the national, state, county and local levels. Karen received the NYSTCA Registered Municipal Clerk certification in April 2014.; this certification is based on education, experience and training.

Karen is active in local politics and is the Financial Secretary for Court Nativity of Our Lady #931 of the Catholic Daughters of America.

Karen has been married for twenty (20) years to Robert and has four (4) boys – Michael 19, Daniel 18, James 16 and William 7. Personal interests include any sporting event or activity that her four boys are involved in. She is also an avid reader and enjoys cooking.

Scholarships

Cheryl Steinbach Scholarship

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 at least two (2) scholarships, not to exceed \$500.00 per award, toward the total cost of school registration and hotel accommodations (does not include travel expenses).

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.

In Search of Worthy Nominees for the Following:

Wheeler B. Melius Award for Excellence in Records Management

This award is given to a NYALGRO member who demonstrates outstanding service to his/her local government and New York's records management community.

The award is named after a clerk who worked in the Albany County Clerk's Office in the latter part of the nineteenth century. Wheeler B. Melius gained his notoriety when on February 10, 1880 he was the first to reach the burning Albany City Hall which housed an immense quantity of public archives and legal records. Melius, once on site, began to pass precious volumes of land records through a narrow window to volunteers outside. Single-handedly, Melius passed 700 volumes—nearly six tons of charred and often soaking, oversized books—out of the building.

Guy D. Paquin Award

The Guy D. Paquin Award is presented to an individual or organization to honor noteworthy achievements and exceptional support and involvements in the records management profession.

Robert Arnold Award or Distinguished Service

NYALGRO presents its Robert Arnold Award for Distinguished Service to an individual who has demonstrated characteristics similar to that of a Regional Advisory Officer in lending expertise and assistance to other local officials in the establishment of furtherance of records management programs.

If you would like to nominate a deserving NYALGRO member for any of the above awards, please contact: Wendy McConkey, NYALGRO Scholarship & Awards Committee Chair at CCE of Saratoga, 50 West High Street, Ballston Spa, NY 12020 or by emailing WLM8@cornell.edu.

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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 April 15 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 within 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 send completed application to: Wendy McConkey
 NYALGRO Scholarship & Award Committee Chair
 50 West High Street
 Ballston Spa, NY 12020
 Fax: 518-885-9078 or email WLM8@cornell.edu

2015 NYALGRO School

“Riding the Records Roller Coaster”

SUNDAY, June 7, 2015

4:00PM - 6:00PM REGISTRATION – Dinner on your Own
7:30PM - 9:00PM Welcome Reception



MONDAY, June 8, 2015

7:00AM - 8:30AM BREAKFAST

8:00AM - 3:00PM REGISTRATION

8:45AM - 9:00AM WELCOME Mayor Robert M. Blais, Village of Lake George and
Desiree Potvin, NYALGRO President

9:00AM - 10:30AM Plenary: IT and Records Management, Building Relationships – Bhargav Vyas, Orange/Ulster BOCES

How can you improve technology for records management and implement a robust electronic records management program? This plenary will discuss ways to work together.

10:30AM – 11:00AM COFFEE BREAK AND VISIT WITH VENDORS

11:00AM - 12:00PM Breakout the Retention Schedules – NYALGRO Board members

This is your opportunity to network with other individuals in your field to see how they code a document or how they use their retention schedule. Town, City, Schools and Fire Districts will be breaking out into groups to discuss their own schedule challenges and successes.

12:00PM - 1:00PM LUNCH - Introduction of Board Members & Vendors

1:00PM - 2:30PM Information Governance – Dave Lowry, NY Archives and Bhargav Vyas, Orange/Ulster BOCES

Information Governance (IG) is a sort of super discipline that encompasses a variety of key concepts from a variety of related disciplines including records management. IG is how an organization maintains security, complies with regulations, and meets ethical standards when managing information. Dave will explain the concept of IG and Bhargav will give more demonstrations on applying the concepts in the real world we work in.

Promoting your Program – Peter Scheibner, Rockland County Archivist

Records are indispensable in the efficient and economical operation of an organization and/or business. They are the memory of past events and the basis of future decisions. Join us for a brief review and talk on how our records management programs function; both the positive and negative issues.

2:30PM - 3:00PM COFFEE BREAK AND VISIT WITH VENDORS

3:00PM - 4:30PM E-Discovery – Seth Gilbertson, Associate Counsel in the State University of New York's Office of General Counsel

E-Discovery is perhaps the fastest growing legal compliance concern in the U.S., and it has been for the past decade. Seth will focus more intently on ways in which proper records management can prevent e-discovery costs and burdens before they occur.

Role of Records Management Officer - Dr. Hans Finke is a past NYALGRO Board member and a recipient of the Wheeler B. Melius Award

This session will focus on the duties and responsibilities a records manager needs to demonstrate in this ever changing profession.

4:30PM – 6:00PM Time on Your Own – Visit the Lake George area

MONDAY, June 8, 2015 continued

6:00PM

PRESIDENT'S RECEPTION

7:00PM

ANNUAL BANQUET DINNER AND ANNOUNCEMENT OF AWARDS

TUESDAY, June 9, 2015

7:00AM - 8:15AM

BREAKFAST

8:30AM - Noon

REGISTRATION

8:30AM - Noon

Data Storage/Cloud Technology – Dave Lowry and Maria McCashion from NYS Archives

With the growing numbers of electronic records being created in government today comes the growing need to provide appropriate data storage. A basic overview of common ways electronic data is stored and an understanding of how it fits in with records management.

8:30AM - 10:00AM

Freedom of Information Act/Law – Camille Jobin-Davis, Assistant Director, NYS Committee on Open Government

The Freedom of Information Law (FOIL) governs access to records of state and local government in New York. Come hear a lively presentation on which records are required to be made available, which may be withheld, and which must not be disclosed, including where to get help when you need it.

10:00AM - 10:30AM

COFFEE BREAK AND VISIT WITH VENDORS

10:30AM - 12:00PM

Records Management for Fire Districts – TBD

12:00PM - 1:00PM

LUNCH – Cheryl Steinbach Annual Scholarship Awards and Business Meeting

1:00PM - 2:30PM

Policies and Procedures – James Tamaro, Adjunct Professor, SUNY Buffalo

Explore the types of records management policies and procedures which should be put in place and conclude with a review of the process for developing a records management procedure manual.

Introduction about Purchasing to Assist the RMO – Karen Storm, Purchasing Agent, Albany County Division of Purchasing

An introduction to local government procurement practices and what's new with the introduction of best value and national cooperatives.

3:00PM – 4:30PM

Tour of Warren County Records Center – Carpool to this close destination

Warren County operates a full-service records management program, which includes the storage of more than 14,000 cubic feet of inactive, permanent and archival records for 30 plus county departments and agencies.

6:00PM

Dinner on your own for those staying overnight



**NYALGRO SCHOOL – JUNE 7-9, 2015
HOLIDAY INN, LAKE GEORGE, NY
“Riding the Records Roller Coaster”**

Please fill out the *NYALGRO Registration Form*, select the sessions that you want to attend and mail it with your check.

Name:	Title:
Municipality/Organization:	
Address:	Telephone #: Email:

- RAC Member
 New Member
 First Time Attendee
 Board Member

I received my School Registration by:
 e-mail
 Internet
 Mail

PLEASE CHECK YOUR REGISTRATION

Registration Fees	Registration NYALGRO Member	\$30.00	_____
	Registration Non-Member	\$60.00	_____
	(includes \$30 membership fee)		
	TOTAL SUBMITTED	\$	_____

School reservations not honored will be billed. Cancellations for a refund must be made by close of business May 22, 2015. Please complete and return with a voucher or check for the grand total to: NYALGRO, c/o June Patterson, Highlands Town Clerk, 254 Main Street, Highland Falls, NY 10928

2015 School Classes/Event – Please check the areas you wish to attend.

Sunday, June 7, 2015

7:30PM – 9PM Welcome Reception

Monday, June 8, 2015

- 9AM – 10:30AM Plenary – “IT and Records Management, Building Relations”
- 11AM – Noon Breakout of Retention Schedules – Please choose which one to attend:
 CO-2 (Counties) ED-1 (Education) MI-1 (Miscellaneous) MU-1 (Municipalities)
- 1PM – 2:30PM Information Governance OR Promoting Your Program
- 3PM – 4:30PM e-Discovery OR Role of Records Management Officer
- 6PM – 7PM President’s Reception
- 7PM Banquet and Awards (food choice selected on hotel registration form)

Tuesday, June 9, 2015

- 8:30AM – 12PM Data Storage/Cloud Technology (CERTIFICATE PROGRAM)
- 8:30AM – 10AM Freedom of Information Act/Law
- 10:30AM – Noon Records Management for Fire Districts
- 1PM – 3PM Policies and Procedures OR Bidding/Purchasing
- 3PM – 4:30PM Tour of Warren County Records Center

NYALGRO 2014 Conference
Hotel Reservation Form
June 7th – 10th 2015



In order to receive the NYALGRO package rates your reservation request **MUST** be made by no later than May, 7th 2015
 All Reservations are to be made using this form. Forms must be sent, faxed or emailed to the Holiday Inn Resort:
Mail: PO Box 231, Lake George NY 12845 Fax: 518-668-9213 Email: lakegeorge@turfhoteles.com

1 Night Package		Includes the following, along with service charges. TAX EXEMPT.	
Monday, June 8 th	Breakfast, Lunch, Cocktail & President's Reception, Overnight Accommodation		
Tuesday, June 9 th	Breakfast and Lunch		
Please indicate your selection by placing an "X" in the box below:			
Single	\$230.00	<input type="checkbox"/>	Double \$185.00 <input type="checkbox"/>
2 Night Package		Includes the following, along with service charges. TAX EXEMPT.	
Sunday, June 7 th	Welcome Reception, Overnight Accommodation		
Monday, June 8 th	Breakfast, Lunch, Cocktail & President's Reception, Overnight Accommodation		
Tuesday, June 9 th	Breakfast and Lunch		
Please indicate your selection by placing an "X" in the box below:			
Single	\$370.00	<input type="checkbox"/>	Double \$275.00 <input type="checkbox"/>
3 Night Package		Includes the following, along with service charges. TAX EXEMPT.	
Sunday, June 7 th	Welcome Reception, Overnight Accommodation		
Monday, June 8 th	Breakfast, Lunch, Cocktail & President's Reception, Overnight Accommodation		
Tuesday, June 9 th	Breakfast and Lunch, Overnight Accommodation		
Please indicate your selection by placing an "X" in the box below:			
Single	\$475.00	<input type="checkbox"/>	Double \$335.00 <input type="checkbox"/>
MEAL ONLY PACKAGE		Includes the following, along with service charges. TAX EXEMPT.	
Sunday, June 7 th	Welcome Reception		
Monday, June 8 th	Breakfast, Lunch, Cocktail & President's Reception		
Tuesday, June 9 th	Breakfast and Lunch		
Please indicate your selection by placing an "X" in the box below:			
Single	\$165.00	<input type="checkbox"/>	

Guest #1 _____ I have attached a completed NYS Tax Exemption form

Name _____

Address _____

Phone Number _____ Email _____

Please indicate meal choice for Monday's President's Reception by placing an "X" in the box below:

Beef	Chicken	Fish	Vegetarian
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please note food allergies/dietary needs: _____

All reservations must be secured with a credit card. Cash will be accepted at check in or full payment by check
 PRIOR TO May 25th 2015. No Personal Checks will be accepted at check in

Cancellations must be made by Midnight on Wednesday, June 3rd or a cancellation fee will be charged

Credit Card Type _____ AMEX _____ Discover _____ Visa _____ Mastercard

Credit Card Number _____ Exp. Date _____

Name on Card _____

Guest #2 _____

If you are reserving a double package, kindly provide the second guests name. They will need to submit a form of their own.

Check in time: 4:00pm

Check out time: 11:00am



New York State Department of Taxation and Finance
New York State and Local Sales and Use Tax
Exemption Certificate
 Tax on occupancy of hotel or motel rooms

ST-129
 (4/12)

This form may only be used by government employees of the United States, New York State, or political subdivisions of New York State.

Name of hotel or motel Holiday Inn Resort		Dates of occupancy From: _____ To: _____		
Address (number and street) Canada Street, PO Box 231		City Lake George	State NY	ZIP code 12845
				Country USA

Certification: I certify that I am an employee of the department, agency, or instrumentality of New York State, the United States government, or the political subdivision of New York State indicated below; that the charges for the occupancy of the above business on the dates listed have been or will be paid for by that governmental entity; and that these charges are incurred in the performance of my official duties as an employee of that governmental entity. I certify that the above statements are true, complete, and correct, and that no material information has been omitted. I make these statements and issue this exemption certificate with the knowledge that this document provides evidence that state and local sales or use taxes do not apply to a transaction or transactions for which I tendered this document, and that willfully issuing this document with the intent to evade any such tax may constitute a felony or other crime under New York State Law, punishable by a substantial fine and a possible jail sentence. I understand that the vendor is a trustee for, and on account of, New York State and any locality with respect to any state or local sales or use tax the vendor is required to collect from me; that the vendor is required to collect such taxes from me unless I properly furnish this certificate to the vendor; and that the vendor must retain this certificate and make it available to the Tax Department upon request. I also understand that the Tax Department is authorized to investigate the validity of tax exemptions claimed and the accuracy of any information entered on this document.

Governmental entity (federal, state, or local)		Agency, department, or division		
Employee name (print or type)	Employee title	Employee signature	Date prepared	

Instructions

Who may use this certificate

If you are an employee of an entity of New York State or the United States government and you are on official New York State or federal government business and staying in a hotel or motel, you may use this form to certify the exemption from paying state-administered New York State and local sales taxes (including the \$1.50 hotel unit fee in New York City). This **does not** include locally imposed and administered hotel occupancy taxes, also known as *local bed taxes*.

New York State governmental entities include any of its agencies, instrumentalities, public corporations, or political subdivisions.

Agencies and instrumentalities include any authority, commission, or independent board created by an act of the New York State Legislature for a public purpose. Examples include:

- New York State Department of Taxation and Finance
- New York State Department of Education

Public corporations include municipal, district, or public benefit corporations chartered by the New York State Legislature for a public purpose or in accordance with an agreement or compact with another state. Examples include:

- Empire State Development Corporation
- New York State Canal Corporation
- Industrial Development Agencies and Authorities

Political subdivisions include counties, cities, towns, villages, and school districts.

The United States of America and its agencies and instrumentalities are also exempt from paying New York State sales tax. Examples include:

- United States Department of State
- Internal Revenue Service

Other states of the United States and their agencies and political subdivisions **do not** qualify for sales tax exemption. Examples include:

- the city of Boston
- the state of Vermont

To the government representative or employee renting the room

Complete all information requested on the form. Give the completed Form ST-129 to the operator of the hotel or motel upon check in or when you are checking out. You must also provide the operator with proper identification. Sign and date the exemption certificate. You may pay your bill with cash, with a personal check or personal credit card, with a government voucher, or with a government credit card.

Note: If, while on official business, you stay at more than one location, you must complete an exemption certificate for each location. If you are in a group traveling on official business, each person must complete a separate exemption certificate and give it to the hotel or motel operator.

To the hotel or motel operator

Keep the completed Form ST-129 as evidence of exempt occupancy by New York State and federal government employees who are on official business and staying at your place of business. The certificate should be presented to you when the occupant checks in or upon checkout. The certificate must be presented no later than 90 days after the last day of the first period of occupancy. If you accept this certificate after 90 days, you have the burden of proving the occupancy was exempt. You must keep this certificate for at least three years after the later of:

- the due date of the last sales tax return to which this exemption certificate applies; or
- the date when you filed the return

This exemption certificate is valid if the government employee is paying with:

- cash
- personal check or credit/debit card
- government voucher
- government credit card

Do not accept this certificate unless the employee presenting it shows appropriate and satisfactory identification.

Substantial penalties will result from misuse of this certificate.



Records Management Solutions

- Records Management Software
- Workflow & Business Process Automation
- SharePoint Integration
- Hosted & Onsite Document Management
- Document Capture & Indexing
- Systems Integration & Consulting

Document Conversion Services

- Scanning All Size Paper Documents
- Book Scanning
- Indexing/Data Entry
- File Format Migrations
- Microfilm Scanning
- Digital-to-Microfilm Archive Writing

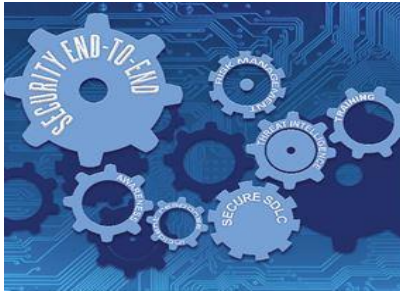


IMA TECHNOLOGIES, LLC.

150 Knickerbocker Avenue, Suite E, Bohemia, NY 11716

Phone: 631-589-8100 - Fax: 631-589-8119 - Email: info@imatechnologies.biz

Website: www.imatechnologies.biz



Security End-to-End

NYS Office of Information Technology Services
Enterprise Information Security Office

The Internet plays an integral part in our daily lives and being constantly connected at work and at home brings increased risk of theft, fraud, and abuse. Government, law enforcement, the private sector, and members of the public, must work together to create a safer cyber environment.

Consider this:

- 38% of mobile users have experienced mobile cybercrime, yet only 50% of mobile users take even the most basic security precautions¹
- Ransomware attacks grew by 500 percent in 2013²
- 12% of social media users say someone has hacked into their social network account and pretended to be them³
- 18% of users will visit a link in a phishing email⁴
- 8 Mega Breaches occurred in 2013 - each exposing more than 10 million identities; a total of 552 million identities were exposed for the year – an increase of 493% over the prior year⁵

Learn more about these issues, how they impact you, and what you can do to improve your cyber posture by attending the 18th Annual New York State Cyber Security Conference (NYSCSC '15) and 10th Annual Symposium on Information Assurance (ASIA '15) at the Empire State Plaza in Albany, New York on June 2 - 3, 2015. This year's Conference focuses on a comprehensive approach to security and will allow attendees to:

- Stay current on cyber security threats, vulnerabilities, and exploits
- Find solutions for information security issues
- Participate in cost-effective security training
- Network with peers
- Learn about industry developments by visiting the Exhibit Hall
- Earn Continuing Professional Education (CPE) credits

A variety of sessions, including topics for business managers, law enforcement, educators, information security professionals, technical staff, and others will be offered. Registration is **free** to government and public sector employees, including kindergarten-higher education. The Conference agenda will be available in the early spring. Plan to attend now and check back for updates at <http://www.its.ny.gov/eiso/conference/2015/>.

NYSCSC '15 and ASIA '15 are co-hosted by the New York State Office Information Technology Services Enterprise Information Security Office (NYS ITS EISO), the NYS Forum, Inc. and the University at Albany's School of Business and College of Computing and Information. If you have any questions, please contact the NYS ITS EISO at cyber.outreach@its.ny.gov.

¹ Symantec 2014 Internet Security Threat Report, Volume 19
http://www.symantec.com/security_response/publications/threatreport.jsp

² Ibid.

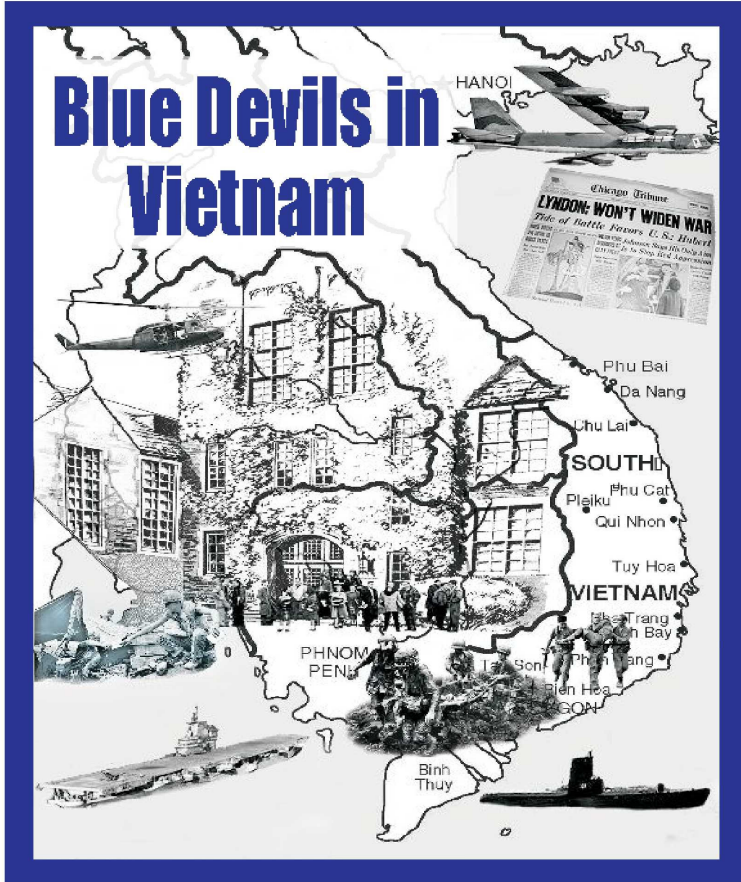
³ Ibid.

⁴ 2014 Data Breach Investigations Report
<http://www.verizonenterprise.com/DBIR/2014/>

⁵ Symantec 2014 Internet Security Threat Report, Volume 19
http://www.symantec.com/security_response/publications/threatreport.jsp

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