

NEW YORK ASSOCIATION OF LOCAL GOVERNMENT RECORDS OFFICERS

NETWORK

www.nyalgro.org

Spring 2016

President's Message

Spring 2016

WOW this winter went fast. As of this writing very little snow has fallen and my residents are very happy about it – until I remind them that no snow equals water restrictions in the summer. As always, your Executive Board



has been working hard to bring you a fully packed, educational and fun filled conference. This year our annual conference will be in beautiful Sullivan County at the Villa Roma Resort and Conference Center. Our schedule is printed in this newsletter and you should be receiving your registration packet in the mail shortly.

Changes to the Executive Board:

I would like to take a moment to recognize a member of the Executive Board that has stepped down from serving in anticipation of retiring from his position. Peter Scheibner is a founding member of NYALGRO and has served for the Association since its inception. His insight and guidance to all Board members will be missed and has been truly appreciated. I would also like to welcome Angela Arasim, Village Clerk from the Village of Fishkill, to the Executive Board.

Do you know someone deserving of an award/recognition?

We are always on the looking for three deserving individuals/groups to be awarded at our 2016 conference. NYALGRO gives out three awards each year and we need your help with recommendations. Please review the award descriptions on our website and reach out to us with your suggestions!!

Do you need a scholarship?

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 the deadline is fast approaching.

I am excited to meet our new members and to catch-up with existing members at the School in June. Please be sure to come up to me and say hi! Please feel free to call me at any time—I am here for all of you. 845-928-6829, ext. 7.



Desiree Potvin President

Michelle Rowe Vice President

A. Diane Muscoreil Secretary

Rosemary Switzer Treasurer/Co-Editor

Katherine Montemarano Co-Editor Newsletter

> Wendy McConkey NYALGRO Website

> > Angela Arasim Member

Lillian Barton Member

Mary Ellen Beams Member

> Gina Doty Member

Jessica McClennan Member

> June Patterson Member

Peter J. Scheibner Member

Karen M. Sweeting Member

Dave Lowry
NYSED Liaison to Board

James Tammaro, MLS Emeriti

Donna M. Mumbulo Immediate Past President



Meet Our New Board Members

Mary Ellen F. Beams



I have been a resident of the Town of Monroe in Orange County for 50 years. I have been married to my husband Frank for 30 years we have six children, two grandchildren. My career in government started in the Town of Monroe as a Deputy Town

Clerk in 2002 at which time I also began serving as the secretary to the Zoning Board of Appeals. In July of 2005 I became the Town Clerk, Records Management Officer and Registrar for the Town of Monroe. In 2006 I stepped down from the position of secretary to the Zoning Board of Appeals and added tax collection to my Town Clerk's office. This year at the Town Clerk's conference in April I received my Registered Municipal Clerk status. I also serve as the Monroe Joint Fire Districts secretary and records management officer since the formation of the district in 2011.

Angela Arasim, Village Clerk, Village of Fishkill



I started my position as Village Clerk/RMO 16 years ago I decided one of my major tasks was to try to revamp the Village records. I applied for a grant and was granted the full amount. Over three years and two more grants I was able to hire an inventory clerk

to purge records, shred, inventory and categorize all record series, and incorporate into a data base (given to me by Dave Lowry). Since then I have been able to keep up on the retention of records, find records easily, and maintain a neat and accessible file room.

Being a part of NYALGO I have not only met wonderful people, but have learned that there is always more useful information at these training schools that make me do what I do in a more efficient and professional manner. I look forward to being a part of this organization where I can contribute and assist with keeping the training school going and getting the word out to other Clerks and RMOs of what a beneficial organization this is. Thank you for your vote!

Welcome Aboard!

Helpful Tips

Here are some tips from Kathy Montemarano, Livingston County's Record Manager in how to reduce paper in offices and how her County departments transfer records to their storage facility:

Reducing paper

- There are costs of unnecessary use of paper and of storing paper.
- Think before you print.
- Think of your office as a "Less Paper" Office.
- Print only the pages you need
- Use print preview and shrink to fit
- If the second page would be a line or two, change the font or print size to print all on one piece of paper
- Use narrower margins
- Wasted forms—1/3 are outdated before they are used. Forms can sometimes be downloaded and printed as needed
- Reduce print runs
- Eliminate unnecessary forms
- Clean out your files
- Simplify your forms
- Use as scrap paper
- Save to a computer disc or memory stick
- Is a hard copy always needed or is it sufficient to make it available upon request?
- Do you need copies for all staff or can information be posted in a common area?
- Digitize information as early in the process as possible
- Paper copy can be lost or damaged
- When you attend a meeting, do you really need to have a hard copy?
- Can you be pointed to a website?
- Can you ask for printouts to be e-mailed if needed?

Benefits & Environmental issues

- Produce less waste
- Save money on paper, toner, postage, filing and copy costs
- Save a tree

County Records:

When sending records over to Record Center:

- Purge catalogs and pamphlets
- You can toss informational and reference papers that have served their purpose
- Do not send the whole pad if you have only used a few sheets on a pad of paper
- NO garbage please

Ask yourself a few questions:

- Is it the official copy?
- Does your office need to save it in your files?
- Examples:
- · Board of Supervisors—minutes, resolutions

They're available on the computer back to 1996.

They have been microfilmed.

County Auditor -vouchers

Grant to Deal with Email

One of the most frequent questions New York State Archives' staff get from constituent local governments, including many towns, is how do I deal with email or what is the retention period on email? The problem is there are no easy answers. Email poses multiple records management challenges for the user and record manager alike. The two biggest problems? Managing the large volume of email and determining which emails are records and which are not. Once you've done that, you then have to decide what kind of record it is, and match it up to the proper retention item in the MU-1 Records Retention Schedule.

To find solutions to these challenges, the New York Archives is introducing a new Demonstration Grant category for the 2016-2017 grants cycle to manage emails through the records lifecycle.

Grant applications for this demonstration project must set up reusable products and protocols that will manage electronic messages (including attached metadata) through the records-lifecycle from creation to disposition. Proposed projects must propose methodologies and processes for managing email that limit the involvement of email account holders in the management of email records and implements uniform policies and methodologies to manage electronic mail. Applications for this project will be considered Document Conversion and Access grant applications for the purposes of review and must address all related requirements of that category. A demonstration project applicant must design a planning or implementation project that lays out how the applicant will

- Develop protocols and business rules to categorize electronic messages into record and non-record categories and develop a filing schema and taxonomies for record emails, including, but not limited to, the implementation of auto-categorization software.
- Develop protocols and processes to apply retention schedules to record emails using such retention methods as big bucket solutions, uniform retention period(s) or account holder

- retention, with the use of a content management system, records management application (RMA), or other methods.
- Develop protocols and processes to identify and retain only one official copy of each record email and implement single instance storage with the use of de-duplication software or other methods.
- Develop protocols and processes to ensure the preservation of electronic mail with long-term or permanent retention requirements.
- Design and/or implement a system of access controls to protect email records from both inappropriate access and accidental or otherwise unauthorized modification, replacement, or destruction.
- Design and/or implement a governance structure outlining individual roles, responsibilities and accountability for the system and processes within the system, including a process for authorizing disposition and ensuring that email records can be destroyed only after all appropriate authorizations have been granted
- Design and/or implement a system that completely destroys any obsolete electronic records from both the system and any backups once their destruction has been authorized Proposed projects may also consider the need to
- Develop protocols and processes to comply with Freedom of Information Law (FOIL) requests and e-discovery motions for electronic mail including the ability to redact information protected under the Personal Privacy Protection Law (PPPL), personally identifiable information, and any other information that is not disclosable.
- Design and/or implement an auditing system to ensure that email records cannot be changed without such changes being documented within the system

To learn more about Demonstration Grants and this new email category visit the State Archives website at www.archives.nysed.gov or contact your State Archives' Regional Advisory Officer.

New England Archives Ce

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NYALGRO Conference



Villa Roma Resort Lodges is set in the Catskill Mountains, two-and-a-half hours' drive from New York City. On-site amenities include skiing, an indoor racquetball club, indoor and outdoor pools, kiddie pool, sports complex, indoor tennis center, bowling alleys, health club equipped with a full circuit of Universal equipment, snowmobile trails, and nightclub. There is an 18-hole PGA championship golf course and clubhouse with restaurant, steakhouse, and bar.

Come join us at the NYALGRO conference: Attend classes and learn valuable information relating to records management. In your free time enjoy your surroundings and have fun!







Thank You NYALGRO Network for your business and continued support!

Henderson-Johnson Co. Inc. has been Designing and Installing unique file storage solutions since 1994.

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Website: www.imatechnologies.biz

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 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 April 15th 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	ITTIE
Government/Agency	
Address	
Phone #	
Years in Records Management	
individual will NOT be paid by the go	Authorization expenses at the annual NYALGRO School by the above named vernment/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

Scholarships Available

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 committment 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 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, outsized 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 Distinquished 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.

Museum Tour

On Monday, June 6, at 4:00 p.m. a tour is planned of the Bethel Woods Museum. The cost will be \$15.00 and we will be carpooling. Payment in advanced is required and will be on the conference enrollment form.

The following is from their website:

"The Museum at Bethel Woods is an integral part of Bethel Woods Center for the Arts, which inspires people to lead creative and engaged lives through its many concerts, events, festivals, programs, and exhibitions—all on the site of the 1969 Woodstock Music and Art Fair. The Museum, which opened to the public in June 2008, is housed in a beautiful LEED-certified green building, set back from the top of the Woodstock festival hillside. Within the building, in addition to the Main Exhibit Gallery, Museum Shop and Muse Café (with indoor and outdoor seating), there is a spacious Event Gallery where intimate concerts and other events are held. On the lower level are the Special Exhibit Gallery, Corridor Gallery, and public rest rooms, as well as the Museum's administrative offices. Through our awardwinning Main Exhibit—"Woodstock and The Sixties"—varied and engaging special exhibitions, growing collection of artifacts and reference materials, museum programs for children, youth, and adults, and the preserved historic site, the Museum makes the lessons and ideals of The Sixties relevant and accessible today.

The Museum embodies the key ideals of the era we interpret—
peace, respect, cooperation, creativity, engagement, and a connection
to the planet we live on and all the people who inhabit it. In
addition to preserving and interpreting an era, the Museum is
actively involved in our community—through education, economic
development, and historic preservation—to encourage social
responsibility among our visitors and supporters and to advocate
for issues that make Sullivan County, and the world at large, a
better place. To borrow from 1960s ideology, everyone has the
power to change the world."





NYALGRO SCHOOL – JUNE 5-7, 2016 VILLA ROMA RESORT, CALLICOON, NY "Keep the Peace with Records Management"

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

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Municipality	Organization:					
Address:				Telepho	ne #:	
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NYALGRO SCHOOL – JUNE 5-7, 2016 VILLA ROMA RESORT, CALLICOON, NY "Keep the Peace with Records Management"

SUNDAY, June 5, 2016

4:00PM - 6:00PM **REGISTRATION - Dinner on your Own**

7:30PM - 9:00PM **Welcome Reception**

MONDAY, June 6, 2016

7:00AM - 8:30AM **BREAKFAST**

8:00AM - 3:00PM REGISTRATION

8:45AM - 9:00AM **WELCOME** Callicoon, New York Local Official

Desiree Potvin, NYALGRO President

Plenary: Getting What We Wished For: The Value of Records in the Modern Age -9:00AM-10:30AM

Thomas Ruller, New York State Archivist - Whether it is identifying the original plans for aging and now failing infrastructure or developing retention and preservation plans for electronic mail; governments and government officials are relying heavily on records to conduct business and records managers to ensure their records are under control.

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

11:00AM - Noon Litigation/Lawsuit - Michael Donnelly, Attorney at Dickover, Donnelly, Donovan LLP

> Electronic records are becoming more prominent in our records management lives, and the records manager needs more knowledge from a legal viewpoint easy to understand. This session will discuss records management issues including these topics and more: FOIL and email communications, agency records available prior to a meeting, producing records in a litigation and placing them on hold, and other topics from a legal perspective.

11:00AM - Noon Managing Social Media - Bonita Weddle, New York State Archives

> Social media services make it possible to communicate with citizens in real time. They also present a host of recordkeeping, security, and other challenges. In this session, we'll discuss how to develop policies that minimize the potential pitfalls of social media use and strategies

for managing social media records.

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

1:00PM - 2:30PM Scanning Project 101 – Katie Palmer-House, Ed.D , Dover Town Clerk and James Tammaro, Adjunct Professor at SUNY Buffalo

This session will begin with a basic introduction to the principles and activities associated with carrying out a scanning project and managing the digital records resulting from a project

and conclude with a review of some very practical advice.

1:00PM - 2:30PMI am Now the RMO, Now What? - Panelists: Kathy Montemarano, Lillian Barton,

Rosemary Switzer, Gina Doty

This session will be a panel of NYALGRO board members with "38" years of combined knowledge in the field of records management to talk about their journey to where they are now. We solicit questions from the audience to collaborate together in this learning

environment together.

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

3:00PM - 5:00PMVendor Blender - Vendors give short demonstrations. The New York Association of

Local Government Records Officers are pleased to launch a new program this year for our vendors. The purpose of the new session is to give the vendors an opportunity for more time with school attendees. As part of this engagement, the attendees will develop a better understanding of products and services.

Continued on next page

Schedule, cont.

5:00PM – 6:00PM Time on Your Own – Visit the Callicoon area

6:00PM President's Reception/Cocktail Hour

7:00PM Annual Dinner Banquet/Award Ceremony

TUESDAY, June 7, 2016

7:00AM - 8:15AM BREAKFAST

8:30AM - Noon REGISTRATION

8:30AM - Noon Email Essentials – David Lowry, NY Archives and Linda Bull, NY Archives RAO

Email messages can be official records when created or received in the transaction of public business. This session will touch on a variety of email issues and here are a few of them: identify emails that are records, consider the best retention strategies, and file, maintain, and

preserve e-mails.

8:30AM - 10:00AM Capitalizing on the Cloud - Dr. Patricia Franks, Certified Archivist, Certified Records

Manager, and Information Governance Professional

This presentation will share examples of local government use of cloud based software and services, provide insight into potential risks, and offer suggestions to mitigate the risks

associated with government use of the cloud.

10:00AM - 10:30AM COFFEE BREAK AND VISIT WITH VENDORS

10:30AM - Noon Managing Court Records – Geof Huth, Chief Records Officer of the New York State

Unified Court System

If you are responsible for managing records of the courts and need more information about

how to manage the records of retired judges or of the Supreme and County courts, attend this session for advice and direction directly from the Court

System's Office of Records Management.

Noon – 1:00PM LUNCH – Cheryl Steinbach Annual Scholarship Awards and Business Meeting

1:00PM - 2:30PM Retention Schedules - breakout session, 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, Counties, Village, Colleges and Fire districts will be breaking out into groups to discuss their own schedule

challenges and successes. Larger breakout spaces for this year's discussions.

2:30PM - 3:00PM BREAK

3:00PM – 4:30PM Protecting Essential Work and Personal Records - Lillian Barton, Saint Regis

Mohawk Tribe RMO

This session is for those who are interested in learning how to create a "bug-out" book in case of an emergency or disaster. Participants will learn how to develop a plan and make a binder that contains vital information needed to carry on in the event of a disaster or

emergency. A binder will be provided and you can take it with you.

6:00PM Dinner on your own for those staying overnight

We hope to see you at our June 2017 NYALGRO School in Geneva, NY. Please look at our website for more information. Thank you for coming!

http://www.nyalgro.org/

NYALGRO exhibit application

	Exhibit Space—2 Days	\$250
	Exhibit Space—2 Days Corporate member rate	\$350. \$250.
	Sponsor a Coffee Hour	\$125.
	Sponsor an Event Welcome/President's Reception Scholarship	\$250. on
	We have carved out a special sout to potential customers by products at a special two hour Monday, June 6th 3:00pm - 5: allotted is determined on how * You must sign up for Exhibit S	demonstrating your vendor session. oopm. Amount of time many vendors sign up. space for this offer.
When the same	Subtotal:	\$
V	Sign up to become a NYALGE Corporate Mei	
	Corporate Membership Benefits: ► Discount on exhibit booth ► Listing on NYALGRO Website ► Acknowlegement in NYALGRO New	\$250 vsletter

► Supporting NYALGRO Educational Programs

Total enclosed:

2016
Keeping
K

JUNE 5-7 Villa Roma Resort 356 Villa Roma Road Callicoon, NY 12723

Lodging & meal package information on online at http://www.nyalgro.org/.

PAYMENT

Please make checks payable to: NYALGRO.

MAIL to: NYALGRO c/o Michele Rowe 143 Corwin Road Rochester, NY 14610

Please Print	
Company Name:	
Vendor Representative:	
Address: City: _	StateZip
Vendor Representative email:	Telephone:
Do you require electricity for exhibit? YES NO	(Exhibit area will have Wi-Fi)
Required # of chairs	

Questions? Concerns?
Please contact: Michele Rowe 585-428-7014.

NYALGRO SCHOOL 2016

The Villa Roma Resort & Conference Center 356 Villa Roma Road Callicoon, NY 12723

Sunday, June 5 through Tuesday, June 7, 2016 (3 days/2 nights)

HOTEL LODGING RESERVATION FORM

Mail, Fax, or E-mail This Completed Form by April 10, 2016 to:

Villa Roma Resort & Conference Center

ATTN: Reservations

356 Villa Roma Road, Callicoon, New York 12723

OR FAX: 845-887-4824, attn: Reservations

A credit card or deposit is required to guarantee your reservation. Please bring your completed tax-exempt form and a proper form of payment such as a organizational credit card or cash. Your personal credit card may not be used as a valid method of payment with the organizational tax exemption form.

PACKAGE RATES			J
*Two Night Stay- Sunday to Tuesday	Double	Single	,
Traditional Room	\$284	\$409	
Suite	\$324	\$464	
**Early Arrival or Late Departure Rates Friday/Saturday Arrival or Tuesday Stay-over per person per night	Double	Single	
Traditional Room	\$127	\$177	
Suite	\$167	\$232	
***Day Guests/Extra Meals/ Commuters:	Per Pe	erson	
Breakfast	\$11.	80	
Lunch	\$20.	.06	
Dinner	\$35.	40	
Dinner & Cocktail Party	\$62.	54	

All rates above are per person based on single and double occupancy. All rates are subject to NYS & Local taxes, currently 10.5%.

*Two Night stay rates include five (5) meals, beginning with breakfast on Monday morning through lunch on Tuesday afternoon, welcome reception and cocktail party.

One Night Stay Rates are half of the two night package plus a \$25.00 per person surcharge. One night stay rates include dinner & breakfast only.

**Early Arrival/Late Departure rates include dinner & breakfast.

Saturday night arrivals will be accommodated in our nonconnecting villas.

***Commuter Meals include 18% gratuities and are subject to 8% NYS Sales Tax

First, Last Name:
Billing Address:
City/State/Zip:
Tele#:
Fax#:
Arrival DateDeparture Date:
Special Requests:
Dietary Restrictions:
Room Type Requested:
Roommate(s)
To confirm your room reservation a \$100.00 deposit in the form of a check or a major Credit Card is required by April 10, 2016. Make Checks Payable to Villa Roma.
□ Check#
□ CC#:
Exp:/CVV:
ROOM DESCRIPTIONS

- Traditional rooms have 2 double or 2 queen beds—hotel's choice.
- Suite rooms consist of 1 bedroom with 2 double or queen beds and a living room with a pull-out couch.

www.villaroma.com Callicoon, NY 800-727-8455