CRM Exam – The Past and the Present

Introduction and Overview to the ICRM Certifications
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What’s in it for me? -- Certification Benefits

• World-wide recognized credentials for Expert Thought Leaders in the field
• Sought after by professional staffing Recruiters and Talent Services
• Potential career advancement with higher salary and benefits
• Enhanced stature in the field and increased professional recognition
• Extensive network colleagues and access to professional resources
• Demonstrated commitment to continuing education and career skills
ICRM Vision and Mission Statements

• **Vision Statement**
To serve as the professional certifying body for Records and Information Management (RIM) professionals, recognized and valued by employers and RIM practitioners worldwide.

• **Mission Statement**
To certify Records and Information (RIM) professionals as Certified Records Managers (CRM) and Certified Records Analysts (CRA), including specialty designations, and to administer a certification maintenance program that ensures its members remain current in this dynamic field.
History and Governance

- Established in 1966 and began conferring certifications in 1975.

- The Institute is governed by an elected, volunteer Board of Regents who are all CRMs and CRAs in good standing.

- Capital Hill Management Services*, Pearson VUE and Prolydian, assist the ICRM board with AMC (Association Management Company) and CBT (Computer-Based Testing) services.

  * 230 Washington Avenue Ext., Suite 101 Albany, New York 12203 USA.
  icrm@caphill.com or 877-244-3128
Our Partners

• Collaborations with strategic partners allow for the ICRM to provide bridges to related certifications and other benefits via academic and RIM training programs. Selected partners* include:

- ARMA International (Association of Records Managers and Administrators)
- MER (Managing Electronic Records)
- AIIM (Association for Information and Image Management)
- NAGARA (National Association of Government Archives and Records Administrators)
- NIRMA (Nuclear Information and Records Management Association)
- LIU (Long Island University)
- LSU (Louisiana State University – School of Library & Information Science)
- SJSU (San Jose State University)
- PRISM (launched by NSA) and others

* Available at www.icrm.org
ICRM Professional Colleagues Network*

- **625 CRA/CRM Candidates**
- **Active Members**
  - 938 CRMs (Certified Records Managers)
  - 189 CRAs (Certified Records Analysts)
- **Retired Members**
  - 203 CRMs
- **Other Designations**
  - 5 CRM-NS (Nuclear Specialist)
  - 8 CRM-FED (Federal Specialist)
  - 2 CRM-NS-FED (Nuclear & Federal Specialist)

*Approximate numbers - based on changing ICRM membership statistics

Data as of April 2015
Social Media Resources

• Twitter: @ICRM_crms
• Facebook: ICRM-Institute of Certified Records Managers
• LinkedIn: ICRM Institute of Certified Records Managers
Certification Process

1. Apply online at www.icrm.org to qualify to sit for the examinations
2. Wait for approval by the ICRM Certification Standards Committee
3. Once approved to be a “Candidate”, schedule to take the examinations
4. Exams are provided by Pearson VUE (PV) a CBT (Computer-Based Test) development and delivery service:
   ✓ Parts 1-5 are available year-round based on PV site availability
   ✓ Part 6 is offered quarterly, check https://home.pearsonvue.com/
Certified Records Analyst (CRA) vs. Certified Records Manager (CRM)

• The Certified Records Analyst “CRA” is the ICRM’s newest certification (since 9-24-16).
• The “CRA” recognizes those with RIM core knowledge by passing Parts 2, 3 and 4.
• One has a 5 year cycle to attain a “CRA”.
• A CRA in good standing has unlimited time to pass Parts 1, 5 and 6 to become a “CRM”.
• If a “CRA” goes on to pass Parts 1, 5 and 6, then their “CRA” designation is replaced by a “CRM” designation.
• A candidate must pass Parts 1 – 5, before being eligible to take Part 6.
• Once all parts of the exam have been passed, one becomes a “CRM”.

INSTITUTE OF CERTIFIED RECORDS MANAGERS
Application process: Education and Experience*

- Applicants must submit documentation of a degree or transcript, to demonstrate completion of a four-year Bachelor’s Degree from an accredited institution of higher education.
- Applicants with a Bachelor’s Degree, must also demonstrate one (1) year of “Professional” Records and Information Management (RIM) experience.
- Alternatively, one (1) year of professional RIM experience can be substituted for each year of college education (total = 5 years)

* Available at www.icrm.org
Professional RIM Experience*

- Conducts studies and surveys
- Develops, designs and implements RIM programs, policies & procedures
- Has direct managerial or operational responsibility for RIM programs
- Teaches records management
- Provides training for records management

* Available at www.icrm.org
Documentation Required for Professional Experience

• **Practitioner**
  
  Formal job description or documentation of job duties in a letter signed by the candidate’s manager.

• **Instructor or Professor**
  
  Department Head letter and syllabus/syllabi of course(s) taught.

• **Consultant, Contractor or Sales Professional**
  
  A minimum of two (2) client letters.
The application fee to become a Candidate is $100.

Register for the exams by logging onto the ICRM website (www.icrm.org)

One must log on using a “Candidate ID” and password. If an ID is needed, please request one at admin@icrm.org

Submit an application and electronic payment to https://db.icrm.org/crm/index.jsp?submit_menu=211

For assistance, please contact us at (877) 244-3128 (USA and Canada) or admin@icrm.org

Pearson VUE, the official CBT testing center for the exams, has over 5,000 test centers in 165 countries. One may also use the ICRM landing page on Pearson’s VUE’s website to schedule, cancel or reschedule exams, see https://home.pearsonvue.com
Exam information

**Parts 1 - 5**
- $100 exam fee (each)
- 100 multiple choice questions
- 80 minutes for each part
- No penalty for guessing
- One can take the parts in any order
- 5-year cycle starts once one is approved
- 70% is required to pass each part

**Part 6 (CRM only)**
- One must pass Parts 1 - 5 before one can take Part 6
- $150 exam fee
- Must write answers for two 50-point Business Cases
- 4 hours to complete
- Exam offered quarterly
- 70% is required to pass Part 6

*Note: All exams are taken through Pearson VUE CBT testing*
The Examinations

A closer look at the Examination Framework and related details
The Examinations

- Test global RIM knowledge in accordance with published sources, some are available at
  - [http://www.icrm.org/exam-preparation-resources](http://www.icrm.org/exam-preparation-resources)

- Exams are developed and vetted by the Examination Development Committee (EDC) which consists of CRMs only and is led by the Regent, Examination Development.

- Exam Questions are updated and reviewed annually
  - Exam Outlines are updated periodically and posted online; and
  - The Exam Outline matches the current test being offered.
Exam Preparation Resources

The ICRM offers a variety of resources for CRA and CRM candidates to prepare for the six examinations.

**Recommended Reading** The following publications have been recommended by the Exam Development Committee as excellent preparation resources. They are all available at the ARMA Bookstore:

- [Records and Information Management](#) by Patricia Franks, Ph.D., IGP, CRM, CA, FAI
- [Records Management for Dummies](#) by Blake Richardson
- [Records and Information Management: Fundamentals of Professional Practice](#), 3rd Ed. by William Saffady, Ph.D., FAI


**Accepted Acronyms** can be found [here](#).

**Sample Questions** The sample questions are offered below are meant as samples only. They are not in the test bank and will not appear on any exam. The answers also list the line in the Outline that each question would be tied to where it is on the exam.

- Part 1 Management Principles and the Records and Information (RIM) Program
- Part 2 Records and Information: Creation and Use
Part 1: Management Principles and the Records and Information Management (RIM) Program (CRM only)

A. Principles of Management  
B. Human Resources/Staffing  
C. Methodologies  
D. Financial Considerations  
E. Planning  
F. Additional RIM Program Components  
G. Directing and Monitoring a RIM Program  
H. Ethical Responsibilities  
I. Global Concerns of a RIM Program
Part 2: Records and Information Creation and Use

A. Information Framework
B. Risk Assessments and Audits
C. Compliance
D. Information Security and Privacy
E. Information Creation
Part 3: Record storage, retrieval, conversion, and facilities

A. Storage
B. Retrieval
C. Conversion
D. Facilities
Part 4: Records Appraisal, retention, protection and disposition

A. Records Inventory
B. Records Appraisal
C. Retention Schedule Creation
D. Retention Schedule Implementation
E. Retention Schedule Administration
F. Vital Records Program
G. Business Continuity
H. Archives
Part 5: Technology (CRM Only)

A. System Life Cycle

B. Architecture and Infrastructure

C. Life-Cycle Management

D. Imaging Techniques

E. Programs and Applications
Part 6: The Business Cases (CRM Only)

- All Candidates are required to complete two (2) written Business Cases:
  - Candidates must complete one mandatory written 50-point Business Case that covers a comprehensive RIM topic; and
  - For the second Business Case, Candidates may choose from two 50-point Business Cases. Each covers a more specific RIM topic.
- Note that Candidates must pass Parts 1-5 before applying to take Part 6
Exam Preparation

1. **ICRM Site** – Taking the Exam Web Page, Approved Acronyms, Sample Questions
2. **ICRM Prep Workshop** – Preparatory workshop on the exams, including how to take exams and study tips
3. **Experience** – Be prepared with the working knowledge gained through experience taking and passing Parts 1-5
4. **ARMA** – Local Chapter, International Conference, and Online RIM Essentials Certificate
5. **Writing Course** – Take a business writing course before taking Part 6
6. **Mentor** – ICRM Mentorship Program – mentor@icrm.org
7. **Education** – Coursework available through ICRM Partners
Partner Courses for Exam Credit

• Receive credit for selected Parts by completing courses with the following:

  • **Long Island University**, Post Palmer School of Library and Information Science:
    ❖ Certificate of Advanced Study in Archives and Records Management = Parts 2-4

  • **San Jose State University**, School of Information:
    ❖ Master of Archives and Records Administration (MARA) degree = Parts 1-5

  • **Louisiana State University**:
    ❖ RIM Certificate Program = Parts 1-5

  • **AIIM**:
    ❖ ERM Master designation = Part 5
Certification Maintenance Requirements

- Once one completes the CRA/CRM, one must earn maintenance points and pay Annual Dues of $200.00
- Earn, document and submit certification maintenance forms for credit
  - One needs 100 points in a 5-year cycle
  - One point = one (1) hour of learning contact
- Maintenance credits must be submitted within 6 months of the qualifying event or activity, and documentation of how credits were obtained is required for any request of more than one hour/point.
- More information can be found at http://www.icrm.org/certification-maintenance/
Appeals

What can be appealed?

• Just about anything can be appealed. To file an appeal, one must have a legitimate reason and submit substantiated information.

• Typical appeals:
  - Decertification
  - Unable to complete CMPs within the designated time frame (6 months after the qualifying event/activity).
  - Failing Part 6 by fewer than eight points (63%–69%)

How does one appeal?

• Appeals must be made in writing (e-mail preferred) and submitted to legislation-appeals@icrm.org. Appeal deadlines vary by cycle and are provided in the exam results notification.
Post Certification Specialty designations

• After completing the CRM, one can also add and take a Specialty Designation exam*:

  ✓ CRM-NS: Nuclear Information and Records Management Association (NIRMA)

  ✓ CRM-FED: U.S. Federal Government Specialty

*Each requires an application (with $125 fee) and completion of a 100-question multiple choice exam (70% is required to pass).
Adopt a “Can Do” Attitude and Focus when Studying

- Don’t go in cold or cram the night before
- Memorize key definitions, study regularly and take practice exams
- Take all 5 parts at once to speed up the exam cycle
- Don’t worry or even think about Part 6 until passing Parts 1-5 first
- If one does not pass certain Parts, try to remember those, for later review
Multiple Choice (Parts 1-5) Test Taking Strategies

- Go with one’s gut and try not to change answers once answered
- Answer all the questions, even if one has to *guess*
- Flag Questions which one doesn’t know the answer for and then go back and answer them later
- Use similar questions to help eliminate wrong answers
- Be aware that duplicate questions do occur on the exam
- Don’t worry or *even think about* Part 6 until passing Parts 1-5 first
Business Cases (Part 6) Writing Strategies

- Review the main chapters of RIM literature to be able to prepare content mentally;
- Read business cases, white papers, and executive summaries for examples on writing;
- Practice writing in an “Executive Summary” format and style and stay in third person and an active voice;
- Be prepared to elaborate on the “What”, “Why”, “How” and “When” for a variety of RIM topics;
- Write a practice case for a mentor, **well in advance** of the test and time it;
- Write two cases, one general example and one specific topic;
- Finish writing **BOTH** questions in 240 minutes!!
- Work with a mentor on feedback for practice exam; and
- Follow directions and don’t argue with what is on the exam.
More Test Taking Tips

- Relax, get a good night’s rest and eat a protein snack before the test
- Read the **entire question** before looking at the answer selections
- Predict the right answer before looking at the answer selections
- Read all the choices before making an answer selection
- Eliminate wrong answer selections right away and don’t revisit them
- Watch for **absolute words** such as “**Always**” and/or “**Never**” as those are usually not correct answer selections
Closing Thoughts

MY ANXIETIES HAVE ANXIETIES.

WHAT IF I CAN'T DO THIS?
WHAT IF EVERYONE HATES ME?
WHAT IF I FAINT?