

Building Support for a Records Management Program

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**“If Records Management is Such a Neat
Idea – Why is it so Tough to Sell?”**

Gail Blount,

Records Management Quarterly, October 1985

**So...You Have to Sell RM to
Upper Management!**

■ Who are they?

- ◆ The key decision makers in your organization

- ◆ Those with the power to decide whether your records program goes or doesn't go

**Upper Management – Examples
Local Government Sector**

- ◆ Elected or appointed boards
- ◆ Town board
- ◆ City council
- ◆ County legislature
- ◆ Mayor
- ◆ County executive

**Blount’s Three Steps to Selling
Records Management**

- Gathering information
- Developing recommendations
- Identifying program benefits

**“Marketing Your RIM
Program”**

By Heather Richmond, CRM and
Sheila Taylor CRM, The Information
Management Journal, September/October 2003

“Marketing Your RIM Program”

Richmond and Taylor

The Four Ps of Marketing

- Product
- Promotion
- Pricing
- Place

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Why Market Your RIM Product?

- To push the WIIFM factor
- To obtain the resources you need
- To survive downsizing
- If the records manager doesn't care who will?

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Tammaro's Eight Ways to Sell Records Management

- Take photographs
- Create a records advisory board
- Select a “champion” from upper management
- Do a study of current costs
- Implement a partial program
- Document everything
- Thank them forever
- Get involved in professional associations

Tammaro's Ways to Sell Records Management

Take Photographs

- Document current conditions
- Use B&W film at the beginning
- Use Color at the end

*Tammaro's Ways to
Sell Records Management*

Create a Records Advisory Board

- A focus group to deal with RM problems
- Guarantees proper input
- Establishes a wide base of support for RM
- Sell the board first on RM

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Select a "Champion" from Upper Management

- Evaluate who is influential
- Find someone who has the interest
- Nurture that interest
- Make the "champion" your salesperson

*Tammaro's Ways to
Sell Records Management*

Do a Study of Current Costs

- A study is easier to sell
- Goal: Identify operations which could be improved with a records management program
- Final report should be the end product

*Tammaro's Ways to
Sell Records Management*

Implement a Partial Program

- It's not a total commitment
- It's a limited program
- Get your foot in the door
- Target a cooperative department

*Tammaro's Ways to
Sell Records Management*

Document Everything!

- Disposal of records
 - Transfer of records
 - Handling requests for records
 - Cost savings – cost avoidance
 - Applications of technology
- HAVE A YEAR-END REPORT!

*Tamaro's Ways to
Sell Records Management*

Thank Them Forever

- Give **THEM** the credit

*Tamaro's Ways to
Sell Records Management*

Get involved a Professional Association

- Joint the association
- Speak at an association meeting
- Serve on the board or a committee

Another Way to Develop Support for a
RM Program –

The RM Procedure Manual

- Use it to obtain official support for the RM program
- Develop a draft
- Create a final draft
- Get it officially adopted
- Distribute it
- Stick to it
- Review it periodically

A Final Way to Develop Support for a RM Program –
**Using Reporting and
Measurement Techniques
for a RM Program**

**Developing a Report on the
Records Management Program**

- Use a word-processing program
- Use graphics
- Use spreadsheets
- Illustrate trends over time
 - ◆ Demonstrate good communication skills
 - Double spaced
 - No run-on sentences
 - No long paragraphs
 - Paginated

The **Four** Basic Parameters to
Track for the Report

- Transfer of records

- Disposal of records

- Requests for records

- Cost savings / Cost avoidance

The **Four** Basic Parameters to Measure for the Report

- Transfer of records
- Disposal of records
- Requests for records
- Cost savings / Cost avoidance

Promoting and Marketing an Archival Program —
Records Management Program
Support Implications

Typical Promotion Activities

- Exhibits
- Public performances
- Newsletters
- Presentations at meetings and conferences
- Tours
- Newspaper articles
- Appearances on radio and television
- in-house receptions
- electronic publication on the Internet

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Outreach Activities

- Activities that result in direct interaction with the public
 - ◆ Allows archives to encourage participation in institutional activities and to garner support for the institution so it may achieve its mission.

Results of Outreach Activities

- Enhancing the local government's image
- Increasing awareness about the local government, its records and RM services
- Educating the board and citizens about:
 - ◆ Local government responsibilities
 - ◆ Role of the RM Program
 - ◆ History of the government
- Increasing use of the government's records and information

Establish a Good PR Program

- Will develop a strong support group
 - ◆ Can contribute to the financial health of the organization
 - ◆ Make your budgetary needs known so that supporters may assist.

Case Study #1

The Archives Partnership Trust
(APT)

APT

What it is

- A 501 (C)(3) Organization

- Trust for
 - ◆ Endowment
 - ◆ Provide project support
 - ◆ Increase access to archival records
 - ◆ Continue preservation work

APT

When it Began

- 1992

APT

How it Functions

- Board of Citizens

- Co-sponsors events with other organizations

- Recruiting members of the APT

APT

Accomplishments

- Research Residency Program
- Student Research Awards Program
- History conferences
- Special Exhibitions
- Public Education Programs
- Book Signings
- Lectures
- Publications

Case Study #1

The Archives Partnership Trust
(APT)

Records Management Program
Support Implications

Case Study #2

New York State Archives Month

NYS Archives Month

What it is

- Month dedicated to:
 - ◆ Raising the level of awareness of the importance of archival records
 - ◆ Promoting the use of archival records
- Official declaration comes from the NYS Governor
- The Month is October

NYS Archives Month

When it Began

- Began back around 1989
- Started by NYC ART
- Originally, events only in NYC

NYS Archives Month

How it Functions

- Governor makes declarations
- NYS Archives conducts events
- NYS Archives encourages local governments and historical agencies to conduct events
- State Archives promotes events

NYS Archives Month

Accomplishments

■ NYS Archives

- ◆ State Archives awards
- ◆ Board of Regents luncheon
- ◆ Distribution of calendar of events
- ◆ Attend regional events

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NYS Archives Month

Accomplishments

■ Local Governments

- ◆ Banquets
- ◆ Tours and open houses of archives
- ◆ Displays and exhibits
- ◆ Misc. events

NYS Archives Month

Accomplishments

■ Historical Agencies

- ◆ Displays
- ◆ Seminars
- ◆ Appraisals

Case Study #2

New York State Archives Month

Records Management Program
Support Implications

Case Study #3

The Town of Amherst
Photographic Collection

Town of Amherst Photographic Collection

What it is

- A collection of approximately 5,000 items
- Dating from early 1950s
- Taken in connection with re-evaluation of commercial and residential properties

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Town of Amherst Photo Collection

When it Began

- Discovered in 1985
- Arranged, described and made accessible in 1987

Town of Amherst Photo Collection

How it Functions

- Housed in individual polypropylene sleeves
- Stored in loose leaf binders in alkaline boxes
- Described in a finding aid
- Finding aid distributed in a number of locations
- Individual prints available for duplication

Town of Amherst Photo Collection

Accomplishments

- Went from no access to:
 - ◆ Physical access
 - ◆ Intellectual access
- Increased publicity for the Town of Amherst Archives Program
 - ◆ Many copies of prints ordered
 - ◆ Copies of prints in published in materials:
 - ◆ "Courtesy of the Town of Amherst Archives"
 - ◆ Increased support for the program

Case Study #3

The Town of Amherst
Photographic Collection

Records Management Program
Support Implications

**Thank you!
Questions?**

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