



NEW YORK ASSOCIATION OF LOCAL  
GOVERNMENT RECORDS OFFICERS

# NETWORK

[www.nyalgro.org](http://www.nyalgro.org)

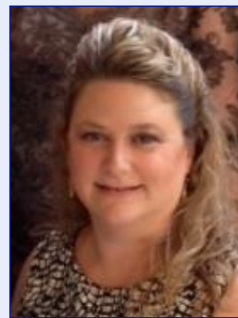
Spring 2024

## President's Message

### Hello Members:

The June conference is quickly getting close and you should have received your Conference packet in the mail. If not, no worries there are applications and the schedule in this newsletter.

If you have any questions or concerns we invite you to a Zoom meeting on April 4 so you can ask anything about the conference. It might help the new members/ first time attendees to become more relaxed and thoroughly enjoy what the conference has to offer.



Below is the information about the meeting:  
Topic: NYALGRO—Conference Prep Q&A  
Time: April 4, 2024, 02:00 PM Eastern Time (US and Canada)

Join Zoom Meeting  
<https://us06web.zoom.us/j/83914139985?pwd=UQxvX5EGrnMUKujgaLiVlJCdWlP0Sw.1>

Meeting ID: 839 1413 9985  
Passcode: 391826

—Desiree Potvin, President  
[nyalgro2020@gmail.com](mailto:nyalgro2020@gmail.com)  
845-928-6829 x1221

## Mentor/Mentee Program

The purpose of this program is to pair a newer records manager with a more veteran one. That way you have another person to bounce ideas off of, ask questions, etc. Matt Shaler set up this program and was very purposeful with pairing folks who are from the same level of municipality and as close geographically as possible.

Please contact Matt if you have any questions: [matthew.shaler@madisoncounty.ny.gov](mailto:matthew.shaler@madisoncounty.ny.gov)

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Immediate Past President



# *Conference 2024— June 9-11*

## **1000 Ways to Navigate Records Management**

*Alexandria Bay-is a perfect setting for networking and meeting other people who work in your field*



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

### **Do you need a scholarship?**

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

# April is Records Management Month

Observed each year in April since 2002, National Records and Information Management Month celebrates good record keeping and information management; and is a time to emphasize the importance of having organized records.

## 5 FASCINATING FACTS ABOUT RECORDS MANAGEMENT

- Records Management Was Recognized in Ancient Civilizations*  
Even in ancient civilizations like Sumer, record keeping was highly regarded. They used clay tablets to keep track of transactions and important events, a practice that set the foundation for modern records management.
- Information Explosion Coincided with the Industrial Revolution*  
The growing complexity of business transactions during the Industrial Revolution led to an “information explosion,” highlighting the need for proper records management practices.
- There are Degrees in Records Management*  
Records Management has become so complex and technologically driven that universities now offer bachelor’s, master’s, and doctorate degrees in information and records management.
- The International Standard for Records Management*  
ISO 15489-1:2016 is the international standard established for records management. This establishes guidelines and principles for the successful management of records in various formats and media.
- The Evolution Into Electronic Document and Records Management Systems (EDRMS)*  
Records management has evolved from managing physical documents to managing electronic documents, with EDRMS driving greater efficiency and accessibility in securely managing records in the digital era.

TOTALLY  
AWESOME 80s

## Join us for a RAD time at the Sunday Welcome Reception Trivia Night

Board Members will be dressing up in their best 80’s attire. So dust off your leg warmers, tease up your hair and come prepared in your 80’s best!



Prizes will be given out to the  
3 best dressed.



I ♥  
THE  
80's



## CHERYL STEINBACH MEMORIAL SCHOLARSHIP Application

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

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

### Award Criteria

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

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

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

### Department Head/Elected Official Authorization

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

\_\_\_\_\_  
 Print Name \_\_\_\_\_ Title \_\_\_\_\_  
 Signature \_\_\_\_\_ Date \_\_\_\_\_

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



*New York State Archives*

# NYALGRO Conference, Alexandria Bay, NY

June 9-11, 2024



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

I am a (check all that apply):

- New Member       First Time Conference Attendee  
 Existing Member       Vendor       Speaker

Type of Government / Agency:

- City       County       BOCES       Fire District  
 College       School District       Town       Village  
 Other (please identify): \_\_\_\_\_

Conference Registration Fee (pick one):

NYALGRO Member      \$30.00      \$ \_\_\_\_\_  
Non-Member (includes \$50 membership fee)      \$80.00      \$ \_\_\_\_\_

Total Submitted:      \$ \_\_\_\_\_

***All meals / breaks are included depending on the overnight package selected on the hotel reservation form. If you are commuting to the conference, you will need to purchase a commuter package with the hotel. If you are bringing a guest that is not attending the education portion of the conference, you will need to purchase additional meal tickets on the hotel reservation form.***

## IMPORTANT

Cancellations for a refund must be made by close of business on **May 24, 2024**.

Please complete this form and **return with a check payment** to: NYALGRO, c/o Karen Sweeting, Town of Sweden, 18 State St., Brockport, NY 14420.

Riveredge Resort, 17 Holland Street, Alexandria Bay

Please fill out the below form and fax it to 315-482-5010

**BY MAY 3 2024**

If you have any questions please call:

315-482-9917



**Please circle your option:**

<b>Package #1</b> - Sunday Night thru Tuesday Afternoon 6/9-11/2024 Includes Two Nights Lodging and all meals for conference	SINGLE	DOUBLE
	\$520.80	\$424.80 pp

<b>Package #2</b> - Sunday Night thru Monday Afternoon 6/9-10/2024 Includes One Night Lodging, Sunday Welcome Reception, Monday Breakfast/Lunch	SINGLE	DOUBLE
	\$256.80	\$208.80 pp

<b>Package #3</b> - Monday Afternoon thru Tuesday Afternoon 6/10-11/2024 Includes One Night Lodging, Monday Lunch/Dinner, Tuesday Breakfast/Lunch	SINGLE	DOUBLE
	\$318	\$270 pp

<b>Additional Nights</b>	Friday, June 7	Saturday June 8	Tuesday June 11
	\$160	\$160	\$107

<b>Commuter Package</b> - Lunch Monday/Tuesday & Breaks Monday/Tuesday	\$126 pp
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Extra Meal Tickets:	_____ Sunday Welcome Reception	\$65.00
	_____ Monday Breakfast	\$24.00
	_____ Monday Lunch	\$36.00
	_____ Monday Banquet Dinner/Cocktails	\$90.00
	_____ Tuesday Breakfast	\$24.00
	_____ Tuesday Lunch	\$36.00

MONDAY DINNER BANQUET - **Please circle food choice:**

Beef      Vegetarian      Fish

If you have dietary restrictions please call the hotel directly.

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ email \_\_\_\_\_

CC# \_\_\_\_\_

Expiration \_\_\_\_\_ Security Code \_\_\_\_\_

# 2024 Session Schedule

See enclosed schedule for session descriptions.

## Monday, June 10, 2024

8:00am-9:00am	New Member / First Time Attendee Orientation
9:00am-10:15am	How to Start a Records Management Inventory
9:00am-10:15am	Introduction to Electronic Records
10:45am-12:00pm	Developing a Records Management Policy and Procedure
10:45am-12:00pm	Building a Relationship Between the RMO and IT
1:15pm-2:30pm	How to Setup a Simple Records Center
1:15pm-2:30pm	Social Media
3:00pm-4:30pm	Round Table

## Tuesday, June 11, 2024

8:30am-9:45am	LGRMIF Grant Review
8:30am-9:45am	Maintaining Your Microfilm
10:15am-11:30am	Public Officers Law / Open Meetings Law
1:30pm-3:30pm	FOIL – Freedom of Information Law

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Did you know?

SCAN ME



We've redesigned our website.  
Scan the QR code to take a look  
and sign up for updates!

We're also on Facebook! Scan the  
QR code to give us a follow.  
*Remember, our President likes to  
hide things in plain sight!*



SCAN ME







NYALGRO School - June 9-11, 2024  
Riveredge Resort - Alexandria Bay,  
NY

**Monday, June 10, 2024**

- 8:00am – 9:00am      **New Member / First Time Attendee Orientation**  
New member? First time attending a NYALGRO school? Come to this session to get a quick orientation about NYALGRO and what we offer to you as a member. Meet other first-time attendees and network.
- 9:00am – 10:15am      **How to Start a Records Management Inventory**  
Conducting a thorough inventory of records is the first step in improving the management of records and information in a local government. This session will cover the various steps to take to start a records management inventory and will also focus on the benefits associated with conducting a records inventory. The session will conclude with a description of how the records inventory can be used directly to carry out other activities to further improve a local government's records management program
- 9:00am – 10:15am      **Introduction to Electronic Records**  
In this class you will learn about electronic records in depth. We will cover what electronic records are and how they differ from physical records. This class is intended to help you manage electronic records effectively throughout their life cycle. You will be confident in how to accurately name electronic files, and you will know how to ensure that your electronic records are legally authentic. You will also learn about the process of electronic records disposition.
- 10:45am – 12:00pm      **Developing a Policy and Procedure Manual**  
Steve Goodfellow, CRM, and President of Access Systems Consulting, will offer his insight and experience from 35 years consulting with local governments on tips to ease developing your own policy and procedure manuals. Key areas as well as recommendations to save you time developing and updating these essential documents will be discussed - hopefully with some humorous examples!
- 10:45am – 12:00pm      **Building a Relationship Between the RMO and IT**  
Communicating, collaborating, and cooperating for clear records objectives for your government. Learning how to play well with others to get your records initiatives completed.
- 1:15pm – 2:30pm      **How to Setup a Simple Records Center (Inventory and Supplies on a Budget)**  
Your local government records center is a key part of your records management program; it is a valuable asset in ensuring proper management of inactive and permanent records through their entire management process, from collection of records to management and storage, to records disposition. This course will cover the basics of establishing a records center, guidelines on operations of, and suggestions for improvements to any currently established centers. Topics that will be discussed will include evaluating records center facilities, proper environmental and security controls, shelving recommendations, policies



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and procedures related to operating a records center, associated costs, and venues for obtaining assistance with improving record center facilities.

1:15pm – 2:30pm

**Social Media**

This class will focus on the implementation of social media archiving systems using vendors. It will include the creation of social media and communication policies, implementation of the program, administrator and user responsibilities, daily monitoring and adapting to new social media technologies.

3:00pm – 4:30pm

**Round Table**

Join with staff from NYALGRO's executive board and the NYS Archives to discuss issues concerning your records.

**Tuesday, June 11, 2024**

8:30am – 9:45am

**What's Missing? What LGRMIF Reviewers Really Want to See in a Grant Application**

This session will provide a look into the mind of a LGRMIF grant reviewer. These grants provide funds to improve the management of records for local governments throughout New York State from small villages to large counties. These projects can include everything from a first-time inventory to an intricate content management system. The session will include some examples of good and bad grant applications and the information that is often lacking or not addressed. This will help hopeful applicants avoid common mistakes reviewers often see.

8:30am – 9:45am

**Maintaining Your Microfilm**

The New York State Archives undertook a study on the current state of the microfilm industry in order to provide local governments with the best advice on the current usage of microfilm. This session will review the results of that study and outline the Archives advice on the use of microfilm as a records management tool. This session will also provide advice on the care and maintenance of the microfilm that your local government may have in storage.

10:15am – 11:30am

**Public Officers Law / Open Meetings Law**

The Open Meetings Law was passed in 1976 to ensure that "the public business be performed in an open and public manner...". Join this session to learn about the Open Meetings Law and bring your questions to receive advice and guidance from the Committee on Open Government.

1:30pm – 3:30pm

**FOIL - Freedom of Information Law**

This session provides an opportunity for attendees to learn more about a government agency's rights and responsibilities in relation to the Freedom of Information Law. The class will focus on the areas of concern most relevant to you, so bring your questions, concerns, and unusual situations to discuss and to receive advice and guidance from the Committee on Open Government.



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 Riveredge Resort		Dates of occupancy From: _____ To: _____	
Address (number and street) 17 Holland Street	City Alexandra Bay	State NY	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.**