Records Managment Quarterly
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Editor **William Benedon, CRM, FAI**

In an introductory memo to members and subscribers, Eunice M. Thompson, as president of the American Records Management Association*, wrote, "This first issue combines discussions on the future of information management with techniques for meeting today's records programming needs."

Unfortunately, we were unable to reach the *RMQ's* first editor, William Benedon, CRM, FAI, who remained involved in ARMA until a few years ago. He left a legacy of 66 issues and more than 500 articles.

*Editor's note: The American Records Management Association merged with the Association of Records Executives and Administrators in 1966, creating the Association of Records Managers and Administrators, now known only as ARMA International. The American Records Management Association published *Records Management Journal* for seven years (1960-1966), perhaps explaining why the cover of the first issue of *RMQ* mistakenly noted it was volume 8. This was corrected to volume one in that year's subsequent issues.

This issue marks the beginning of the 50th volume year for *Information Management* and its predecessors, *Information Management Journal* and *Records Management Quarterly*. In recognition of this milestone and the outside editors who led the magazine during its first 42 years, we asked the records and information management (RIM) professionals who were at the editorial helm to contribute to this issue.

As you will read in this section, this publication has always been focused on the future of the RIM profession, equipping RIM professionals for their current responsibilities, and preparing them for future challenges.

Strokes… from the Penn (Redux)

Ira A. Penn, CRM-R, FAI

When *Information Management* editor Vicki Wiler asked me, as the 1984-1998 editor of this magazine's predecessor, *Records Management Quarterly*, to write a piece for this 50th anniversary issue, I hesitated. I've been retired for almost two decades. Who would care what I might have to say? But then I thought, "Hey, that never stopped you before!" So if you're interested, read on.

I started in records management in 1964. There were no personal computers. There weren't even any word-processors. There were typewriters and file folders, and if you were really cutting edge, there was this thing called microfilm. But so what? We did fine with the paper. If we needed the information the paper contained to go to more than one place, we had carbon paper and a relatively new invention – the Xerox machine!

Piles of Paper

Of course, information on paper is bulky and builds up in large quantities, and the more it builds up the harder it is to remember where you put it. That's why, in addition to all the office staff who created the mess, there were records managers who organized it. They did so by designing things called "filing systems."

Filing systems were great as long as they were used properly. Unfortunately, people were notoriously bad at using filing systems, so important information sometimes went missing.

Perils of PCs

Fast-forward about 20 years and along came this thing called the personal computer. It was a machine about the size of a 1970s TV set, and it sat on your desk. You could input data (i.e., type) by using programs that weird people on the other side of the building created.

The premise that was sold to managers was that the machines, with their mysterious programs, would allow workers to do things better, faster, and cheaper. Unfortunately, people who couldn't use filing systems to store their paper information properly couldn't use the computer systems to do so either. The big difference was that with the paper you had a snowball's chance of actually finding the information. When the stuff was in bits and bytes and invisible… well, you can imagine.

Amazingly, this little glitch didn't seem to slow down the machine adoption rate at all. Why? Because the paper was piling up in ever-increasing amounts and the managers were looking for something – anything – to solve the problem. (Note: Needless to say, I'm over-simplifying. Forgive me. I'm working with a word count restriction.)

Of course, one might well ask, "Where were the records managers while all this was going on?" The answer, in a nutshell, is "Absent!"

RM's Evolution

The records management profession evolved from the efficiency movement. *Efficiency experts* (the term was first used in 1913 and means one who analyzes methods, procedures, and jobs in order to secure maximum efficiency) had revolutionized the industrial scene and were highly regarded. So in the early 1950s the thought was to transfer the same methodology to the office.

Office workers would become more efficient (think paper, remember) through the use of the aforementioned filing systems, along with techniques for forms design and management, reports management and control, and records disposition schedules.

All the various elements put together made up what was called "the life cycle theory of records management." And it was a damned good theory! If you controlled the information that was created and restricted it to only that which was necessary, you'd have less information to manage, and it could be organized and retrieved in an efficient manner. When it was no longer needed, it could be disposed of – or archived for historical purposes.

The hitch was that records managers never managed to don the cloak of respectability and authority that the efficiency expert had. Records managers seemed to have a Dickensian aura about them. They were the quiet Bob Cratchits working away behind the scenes. "Glitzy" is not a word you would ever use to describe the function.

In fact, unless some organization was being sued or there was a massive fire that destroyed vital documentation and threatened a company's existence, most managers and executives didn't even know what records management was! The situation was so ludicrous that when I was editor of the *Records Management Quarterly,* I was still receiving mail asking if I could supply information about opening a record store. Once a person even asked if I filled jukeboxes.

Technology Takes off

Technology can be really cool stuff. So much so that people tend to latch onto it and think it's the be-all and end-all for solving their problems. Within the office, the latching-on got so bad that it wasn't too long before there were

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Editor **Ira Penn, CRM, FAI**

In his first message to readers in July 1984, Editor Ira Penn, CRM, FAI, looked to the past to honor William Benedon's accomplishments and then to the future of the profession and its professionals, saying it "will simply be what we make it. Those who continue to learn and who adapt to meet the demands of the time will be successful. Those who don't will fail."

In this section, Penn reprises his popular "Strokes from the Penn" to share his thoughts about the evolution of records management and what it should be today.
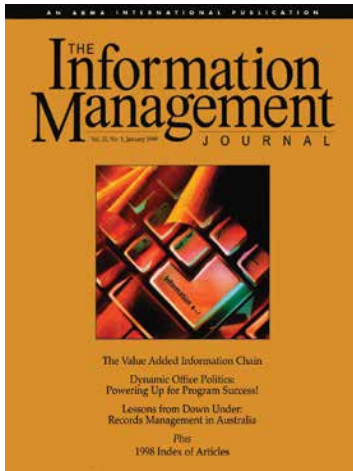
Information Management Journal
1999-2008, Volumes 33 – 42

Executive Editor
J. Michael Pemberton, Ph.D., CRM, FAI

Associate Executive Editor
Julie Gable, CRM, CDIA, FAI

J. Michael Pemberton, Ph.D., CRM, FAI, and Julie Gable, CRM, CDIA, FAI, teamed up for the last issue of *RMQ*, initiating its name change to *Information Management Journal* in January 1999. They served through 2008, after which ARMA staff assumed their duties.

Pemberton and Gable explained that the magazine's name and its scope were changing to reflect the evolution of ARMA and the profession, noting that "successful information professionals must now understand, apply, and lead in areas beyond, or in addition to records management," such as the "allied disciplines of archives management, electronic information systems, knowledge management, and corporate librarianship."

Pemberton, after a decade away from RIM and ARMA, said he felt too far away from the profession to contribute to this issue, but Gable recounts the events that led to a decade of unprecedented change for RIM professionals in the second article in this section.

managers who forgot what their problems were, but they figured that a newer, faster machine would make them go away. (This wrong thinking was greatly encouraged by the equipment vendors who were making money like crazy!)

IT Takes Ownership

Since the problems did not go away, managers started to panic. They resorted to the last refuge of the terminally inept: buzzwords! They coined the term "information resources management," which later was simply shortened to "information management."

The name change wouldn't have been bad had it not been for the fact that the actual function was usually transferred to the folks in newly created "information" departments, who knew nothing about managing records, and so "information" became synonymous with "computer data." Despite the fact that it is records (regardless of medium) that contain the information, records managers were left with the paper in the filing cabinets. They firmly held on to their quills and slowly became all but obsolete.

It's All About Efficiency

Inevitably there are instances when people ask me, "What did you do before you retired?" My answer is simple. I say, "I was an efficiency expert specializing in office systems." Never – not once – has anyone asked what that meant. Because I don't use the word "records," nobody asks if I ever met Chubby Checker or Bob Seger or Billy Joel. Because I don't use the word "information," nobody looks at me with a blank stare.

Even though the term "efficiency expert" has not been in use for some 60-plus years, everybody knows what I mean when I use it. And I'm not lying when I say it. That's exactly what I did – at least until the information charlatans took over. I worked to improve office systems. That's what records management is supposed to be.

There's a lesson to be learned here. I'll leave it to you to decide what it is.**END**

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Disasters, Regulation, Technology Drive
Decade of Change for RIM

Julie Gable, CRM, CDIA, FAI

The overarching theme of my 10 years (1999-2008) as associate executive editor of the *Information Management Journal* (*IMJ*) was complexity. Significant changes in technology, law, globalization, and privacy occurred. Consider the following.

Disasters Occur

America encountered a horrific disaster caused by acts of terrorism on 9/11/2001. The avalanche of paper documents in the wake of the crumbling World Trade Center Towers provided a ghastly new impetus for digitization. The U.S. PATRIOT Act that followed had implications for surveillance of voice, e-mail, and web records as well as those of banks, libraries, and others.

Hurricane Katrina in 2005 was a natural disaster on an unprecedented scale, and beyond the heart-rending consequences for many people came sobering new attention to the need for disaster planning, backup, and recovery.

Regulations Evolve

The decade saw the collapse of Enron. The U.S. Sarbanes-Oxley Act of 2002 that followed put new requirements in place for large, publicly traded companies and made CIOs and CEOs accountable for what they reported. Boards of directors suddenly became interested in how records were kept.

Also during this decade, organizations as diverse as Citigroup, TJ Maxx, Dai Nippon Printing, and Her Majesty's Revenue and Customs experienced data breaches affecting tens of millions of records. The European Union adopted strict laws regarding the privacy of its citizens' records, and some countries outlawed the transfer of electronic records across borders.

In April 2006, the U.S. Supreme Court approved amendments to the Federal Rules of Civil Procedure. Highlights included the recognition of electronically stored information as a category subject to legal discovery. Retention schedules were in high demand as companies realized that it was expensive and potentially detrimental to keep everything forever.

IG Emerges

Organizations began to realize that they could no longer deal with each new requirement in a piecemeal fashion, and the discipline of information governance was born. If compliance, law, and operations were the driving forces for controlling records, then policies had to be based on the input of records management, legal, and information technology as a collaborative team. Because the staggering volume of electronic records precluded the possibility of ever controlling all of them perfectly, new approaches like risk-based retention appeared.

Technology Explodes

Once focused on documents and e-mail, technology exploded with the advent of digital music, videos, smart phones, texting, blogs, data mining, software as a service, social media, and the cloud. The good news was that records management software came into its own, so much so that many highly regarded products were acquired by big-name technology vendors seeking to bring an enterprise approach to information management.

RIM Steps Up

It continues to be a challenging journey for records and information managers, but they have learned their lessons well. The degree of sophistication needed to deal with the complexity of information is enormous, but records managers have stepped up. Today's are as well-versed in laws and regulations as many paralegals; they are technically savvy and financially aware of the costs and benefits involved in governing information well.

ARMA International, through the *Records Management Quarterly*, the *IMJ*, and now *Information Management*, has brought knowledge and inspiration to records managers everywhere. It was my privilege to edit the work of some of the best minds in this profession. For 10 years, I read every word of every issue of the *IMJ*. I have never been smarter.

It is hard to believe that records management was once justified solely on the basis of saving floor space, and that knowing where the boxes were and what they contained was enough. After 50 years of ARMA, we are still in Kansas, Dorothy, but it sure feels like a different planet. **END**

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