

<p>OVERVIEW</p>	<p>Ms. Brooks is a Certified Records Manager and has 25+ years’ experience in the full lifecycle management of records and information field of management. She has been responsible for managing multi-year and complex projects. She has been the corporate records manager for a global semi-conductor manufacturer, manager at a records management software development company and a consultant for records and information management. She has been involved in a number of taxonomy projects for EC/RM implementations, including Oracle Fixed RM, FileNet, OpenText, MS SharePoint, etc.</p> <p>Charmaine has been responsible for all activities associated with information governance and records management for organizations, public or private, small to large, in a variety of industries. She developed processes, systems, and procedures for the full lifecycle management of records and information ensuring compliance with governmental and legal requirements. Ms. Brooks has managed offsite records centers, supervised records management staff, and worked with all levels and departments to plan for and meet the information governance requirements.</p>
<p>CONSULTING PROJECTS</p>     	<p>METROPOLITAN WATER DISTRICT OF SOUTHERN CALIFORNIA Conduct a records program assessment using the ARMA maturity model, technology assessment, staffing assessment and a multi-year roadmap for the records program, staffing and technology ecosystem.</p> <p>WYOMING STATE ARCHIVES Revised the organizational based Wyoming government retention schedules into a functional structure based on ISO 15489, provided practical guidance and recommendations for implementation and assisted with the development of a policy framework for a trusted digital repository.</p> <p>IDAHO STATE ARCHIVES Project lead to conduct a Records Study to assess and analyze the state records holdings and provide future planning recommendations for technology, standards and best practices, training and funding mechanisms for the ISA/RC. The study analyzed the city, county and state records holdings within the state of Idaho and provided recommendations on a number of related matters.</p> <p>TRIMET Completed record management assessment and ECM requirements, developed agency-wide and departmental file plans, implementation plans and training materials. Provided mentoring to records manager to develop and implement the file plans in the departments for shared drive clean up.</p> <p>FEDERAL HOME LOAN BANK Developed a strategy to improve records and information life cycle management, records management roadmap, and determined priorities. Opportunities to improve current operations with the existing set of tools and the potential for gaining strategic advantages were identified.</p>

    	<p>CITY OF TORONTO Developed an electronic records management strategy for the City of Toronto including all components of an electronic records management program, legal compliance issues and alignment issues with existing and proposed document management and information management initiatives. Developed a Business Classification System for the City. The Classification was developed using existing Information Management tools, electronic inventories and collaborative sessions.</p> <p>CITY OF ARLINGTON, TX Conducted records inventory of electronic records and developed classification and records retention schedule based on Texas General Records Schedules.</p> <p>NISSAN NORTH AMERICA As part of a global simplification effort consolidated schedule organizational based records retention schedules structure with 9,000 + record titles into a functional schedule following the ISO 15489 standards. The records were grouped by function, sub-function, and record series reducing the number of record titles to approximately 300 record series in 14 functions. Developed a training strategy and training materials for introducing the new RRS to all Nissan North America affiliates, including PowerPoint slide decks, guidelines and quick reference cards.</p> <p>PUGET SOUND ENERGY The Energy Resources group initiated a project for the management records and information. The first phase of the project was a records management assessment to determine the current state of the group’s records, identify best practices and provide recommendations and a road map for improved governance and management of records and other content. The second phase involved an analysis of document tracking systems to assign retention to records for disposition. The third phase built on information gathered in the previous phases to develop a classification structure and file plan for implementation of OpenText.</p> <p>SNOHOMISH PUBLIC UTILITY DISTRICT IMERGE conducted a high level assessment of the districts Records Management practices. The assessment findings indicated the need for a functional records retention schedule and classification structure in order to deploy OpenText District-wide. A follow on engagement included development of foundational tools for Records and Information Management to support the current and ongoing initiatives for Enterprise Content Management (ECM) and Electronic / Physical Records Management (ERM) to automate content, records and information management using the SharePoint and OpenText platforms. The initial implementation included business processes for documents required in SAP using OpenText’s SAP connector extended ECM (xECM). Ms. Brooks developed a Functional Classification and Records Retention Schedule, OpenText documentation for Record Series Indicators (RSI), and related policies, procedures and guidelines.</p>
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<p>EXPERIENCE</p> 	<p>2005 to-present. IMERGE Consulting, Inc. Partner. Ms. Brooks joined IMERGE in August 2005; in January 2017 she was made a partner in the firm. She has extensive experience in developing file classifications and retention plans for a number of government and commercial applications. Charmaine has taught in the area of Electronic Records Management for many years</p> <p>CORPORATE RECORDS MANAGER</p> <p>Developed and directed all activities associated with records management functions for the company and subsidiaries. Established systems and procedures and supervised individuals to operate the records management program. Developed and conducted records surveys and inventories enterprise-wide and at departmental level. Developed records retention schedules, with legal research. Maintained retention schedules in accordance with applicable laws, regulations, and business requirements. Implemented Compliance Management System for tracking, audits, and findings for non-compliance.</p> <p>Maintained a working relationship with all levels and departments to plan for and meet the record retention requirements of the company. Developed and conducted enterprise-wide education and training program for new hires, department coordinators, and records management staff. Coordinated destruction process with department managers and the legal and tax departments. Managed record center operations and staff including facilities management, litigation and audit support, check in/check out, destruction of obsolete records. Prepared and presented department budgets and reports to management.</p> <p>CLIENT ASSESSMENTS</p> <p>Assess existing records and information practices and systems to measure the effectiveness of ability to capture and maintain the records of the business activities to reveal gaps between the requirements for records management and performance and capabilities of the existing systems in accordance with ISO 15489 the Records Management Standard.</p> <p>ERM STRATEGIC PLANNING</p> <p>Conduct focus groups and workshops to review compliance issues, alignment of programs with other related initiatives (e.g., Document Management Projects, Classification/Taxonomy, and Automation), review the impact of the Electronic Records Management on legacy systems and shared drive cleanup projects.</p> <p>Identify needs and difficulties within the organization: staff and training needs, change management, consolidation of records, disposal of redundant, outdated and trivial (ROT), records security and control, accessibility of records, etc.</p> <p>TAXONOMY / BUSINESS CLASSIFICATION SCHEMES/FILE PLANS</p> <p>Developed classification schemes, file plans and thesaurus for categorizing and grouping records and documents for electronic document and records management. Mapping the classification to the records retention schedules and developing disposition rules for document and content repositories. Developed file plans for implementation of ECM/EDRMS and shared drive clean up.</p>
<p>EDUCATION</p>	<p>San Diego Community College and Boise State University</p>
<p>CERTIFICATIONS</p>	<p>Certified Records Manager, ICRM Enterprise Records Management Master, AIIM Information, Organization and Access Master, AIIM</p>

<p>PROFESSIONAL</p>	<p>Charmaine is a member of the Association for Information and Image Management (AIIM) since 1993 and ARMA International since 1993,</p>
<p>PUBLICATIONS</p>	<p>The Headaches with Reorganizing Your Shared Drives 01/12/2017 with Jim Just Classification: Foundational Elements of Content Lifecycle Management 03/10/2016 <i>Document Strategy Magazine</i> http://documentmedia.com/by-author-100-1.html Managing Electronic Records Robert Smallwood, Charmaine Brooks contributing Author Wiley Publishing, CIO Series 2013</p> <p>Managing Electronic Records: Standards, best Practices & Implementation Issues – A Management Guide ; Robert Smallwood and Charmaine Brooks IMERGE Consulting, Inc. 2007</p> <p>Leveraging MS™ SharePoint 2010 to Manage Electronic Records; Robert Smallwood and Charmaine Brooks IMERGE Consulting, Inc. 2009</p>