




<p>OVERVIEW</p>	<p>Karen has over 25 years’ experience as a consultant in Records and Information Management (RIM) / Information Governance (IG) in both private and public sectors. Karen's diverse experience in business and records management environments makes her proficient at file plan and classification development, the building blocks to a viable IG program. Her background also includes policy development and change management facilitation. Karen has also developed comprehensive training programs as part of IG program implementation. Her knowledge and skills have brought about significant improvements to clients in compliance with and adherence to The Principles® (Generally Accepted Recordkeeping Principles®, Association of Records Managers and Administrators)</p>
<p>CONSULTING PROJECTS</p>   	<p>State of New Mexico Higher Education Department, Santa Fe, NM. The NM Public Records Commission adopted a single functional records retention and disposition schedule in October 2015. This new schedule was based on 100 individual department schedules and around 6,000 existing record series, which were consolidated into 352. This project was part of the HED agency’s implementation of this new State schedule.</p> <p>Cary, NC (population 140,000) engaged IMERGE to help adapt the mandatory NC State Archives Retention and Disposition Schedule. IMERGE developed a classification scheme and retention schedule for 18 Town departments with assistance from department subject matter experts (SMEs) and transformed the subject/department-based schedule into a custom-designed functional one. Included were an assessment and gap analysis of ongoing records management practices and development of common terms to effectively cross-walk the Town’s existing records to the State Schedule – all serving to better reflect actual business processes. The project also included an evaluation of the Town’s public records and electronic messaging policies.</p> <p>Howard County Public School System (MD) had no RIM or ECM system in place and wanted an enterprise-wide approach to ECM and RIM. Project included a records inventory constructed from over 60 surveys and interviews of administrative departments. By this method, records types were identified, a function-based records classification and taxonomy were created, and through research of legal and statutory controls data developed for a functional retention schedule. To adopt the new schedule, a new records management policy was developed. Enterprise-wide training to HCPSS staff was included in this project. As a follow-up, a deeper-dive, more granular and extensive file plan for Human Resources, Finance, and School Construction departments was developed.</p>

	<p>Other public sector RIM / IG clients include several Wisconsin cities (Waukesha, Brookfield, Elkhorn, Manitowoc, and Madison). These Wisconsin projects include municipal utilities (water, electric, and waste management). Most recent are the City of Aspen and Pitkin County, CO; and the Department of Higher Education, State of NM, Santa Fe.</p> <p>Private-sector RIM / IG, market research, and ISO certification projects include Volvo Trucks of North America, Gilbarco Veeder-Root, Ecolab, Journal Communications, Davis & Kuelthau law firm, and The Ad Council. More information available on request.</p>
	<p>Apr 2013-present. IMERGE Consulting, Inc. Principal. IMERGE RIM / IG consulting includes statutory compliance, records program reviews, needs assessments, retention schedule development, and policies and procedures.</p> <p>Mar 94-Mar 13. Precision Organizing & Records Management, Owner. Records and information management, workflow, process mapping, policy development, office organizing.</p> <p>Jan 86–Mar 94. Volvo Trucks of North America, Jun 90-Mar 94. <i>Corporate Records Manager</i>. Responsible for RIM processes for both corporate office and remote locations, and management of company policies and procedures. ISO 9001 quality documentation training. ISO 9001 internal auditor.</p> <p>Apr 88-May 90. <i>Senior Financial Analyst</i>. Developed annual budgets, forecasts, long-range plans, and pricing.</p> <p>Jan 86-Mar 88. <i>Senior Market Analyst</i>. Product team evaluating market area and product line expansion studies. Annual marketing strategic plan development. Monthly sales forecast.</p> <p>May 80-Jan 86. Oakwood Homes Corporation, <i>Director of Market Research</i>. Information for product planning/design. Site analyses for retail sales locations in established and new markets. Demographics and post-purchase capture.</p>
<p>EDUCATION</p>	<p>BA, Political Science/Sociology, East Carolina University</p> <p>MBA, Marketing/Finance, Wake Forest University</p>
<p>CERTIFICATIONS</p>	<p>Certified Records Manager (CRM), Institute of Certified Records Managers, 2006 – present.</p> <p>Certified Professional Organizer (CPO®), National Association of Professional Organizers, 2007– present.</p> <p>Distinguished Toastmaster, Toastmasters International.</p>

<p>SPEAKING</p>	<p>ARMA, Northern New Mexico, Santa Fe. “Taxonomy and Classification: A Distinction Without a Difference”, May 2015.</p> <p>ARMA, Northern New Mexico, 2015 Information Governance Conference, Santa Fe. “Fundamentals of Information Governance”, April 2015.</p> <p>ARMA, Rio Grande Chapter, Albuquerque. Co-facilitator, “ICRM Examination Prep Workshop”, January 2014</p> <p>ARMA International Conference, Las Vegas, NV. “Toward a Better IT-RIM Conversation”, October 2013.</p> <p>ARMA, Southwest Region, San Antonio, TX. “Let’s Improve the RM-IT Conversation”, ARMA SW Regional Conference, May 2013.</p> <p>ARMA, Rio Grande Chapter, Albuquerque. “Shall We Dance? A Better Dialog Between RM & IT”, April 2013.</p> <p>ARMA, Rio Grande Chapter, Albuquerque. “The Principles® and RIM”, April 2012.</p> <p>ARMA, Northern New Mexico Chapter Santa Fe. “The World According to GARP® and the Information Governance Maturity Model”, Spring Seminar, April 2012.</p> <p>ARMA, Rio Grande Chapter. “Whelmed to Underwhelmed: Meeting Productivity Goals”, January 2011.</p>
<p>PROFESSIONAL</p>	<p>Association of Records Managers and Administrators (ARMA)</p> <p>Board officer positions: Northern New Mexico ARMA: President, 2015-present, and 2016 Chapter Leader of the Year; Director, Membership and Recruitment, 2014-2015; Rio Grande Chapter, Albuquerque: VP, Membership, 2007-2010. ARMA Milwaukee Chapter, 2003-06: VP, Membership, and Milwaukee Chapter Member of the Year, 2004. 2005 ARMA International award for member recruitment.</p> <p>Member, 2006-present. Institute of Certified Records Managers</p> <p>Member, AIIM, 2014 – present.</p> <p>Board Administrator, American Society for Training and Development, New Mexico Chapter (ASTD-NM), 2008-2011.</p> <p>Scheme Committee, Board of Certification for Professional Organizers. 2007-2008. Refined testing methods and content.</p>