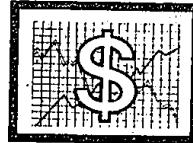


# Business

Marilyn Fitchett editor/591-2300

Thursday, March 12, 1987 O&amp;E

classifieds inside



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Legal restrictions, a company's personal needs and historical importance are three

considerations for maintaining a good records management department.

staff photo by STEVE FECHT

## Records managers seek respect for 'forgotten' job

By Maria Gold  
special writer

Ask Sherwood about the company whose records department went up in smoke along with the building.

"They went out of business, went bankrupt, because they couldn't save the documents," Sherwood said.

"Ask Richard Matyn about the company that disposed of some files they thought were useless."

"They got themselves in all sorts of trouble to the tune of billions of dollars because they could not produce the documents the court asked for," Matyn said.

Sherwood, president, and Matyn, vice president, are members of the Association of Records Managers and Administrators (ARMA), a 30-year-old organization founded to promote records and information management through educational study and research.

If the companies whose records were destroyed or discarded knew how to manage their records properly, the costly consequences could have been avoided. Helping companies decide what records management program will work for them is ARMA's specialty.

The group is holding its fifth annual spring seminar Wednesday, March 18, at the Dearborn Hyatt Regency, a daylong conference. Topics include how to set up a records system, legal requirements for records retention, disaster recovery, and how to lobby for new equipment.

COMPANY RECORDS, an often forgotten aspect of company operations, include all data relevant to every aspect of a company, from employee files to top-secret technologies developing within a department. Records management is a strict set of guidelines that businesses develop and depend upon to organize information and store it appropriately.

It includes everything from following state and national records retention regulations, to determining which storage system will work best for the company, to planning for disasters.

ARMA public relations chairman Jerry Van Loosen, vice president of sales at Van Loosen Enterprises in Redford, says that records retention programs are formulated by three factors. First are the legal restrictions, which dictate how long a company is legally required to retain documents. The rules are often confusing, he says.

Matyn, who works in the corporate records management department of Ford Motor Co. in Dearborn agrees.

"Some of the retention schedules are outlandish."

ARMA International is currently pushing for uniform retention schedules.

Second is a company's personal needs, including storage space and maintenance costs.

HISTORICAL importance is the third factor when deciding how long to keep records. Matyn says that a large portion of Ford's records are kept "virtually forever."

"Without records retention, Ford's celebrated \$5-a-day

pay rate and the design for the Model T might be assets of the incinerator."

Van Loosen says that retention schedules vary with each company, but about 95 percent of company records can be destroyed after 10 years of inactivity. After that time, he recommends destroying the data, but only after writing the retention plan into the company by-laws.

"Don't be a pack rat with information," he said, because irrelevant data can come back to haunt a company — in the form of a court subpoena.

A company is required to present all relevant records unless they have been destroyed in accordance with a valid records retention program.

"A records retention program is one way of providing defense for a company," Van Loosen says. "You won't be responsible for something that you're legally not required to have."

Records retained past the legal requirement must also be produced when subpoenaed. These records can work against the company in a lawsuit. Had they been destroyed after the approved period, the company would not be responsible for their content.

But if records have been disposed of prematurely, the company can also incur costly damages.

VAN LOOSEN says that the majority of lawsuits concern former employee and benefit disputes. He cautions small companies that tend to handle employee claims in a personal basis to document everything and keep updated records in case a file is filed. "You don't open themselves up to a liability that you didn't see if they handled the situation right the first time."

Large companies always have some litigations pending, Matyn says, and must be careful to follow every company and legal guideline for each piece of data.

As important to a company as a retention policy is the management plan. Natural disasters, which cannot be avoided, can wreak havoc on a company if they are not planned for.

"Disaster recovery is a plan of how the company can get back on its feet the day after the fire," Matyn said. Knowledge of restoration techniques and backup copies of data stored off-site can save a company.

AS IMPORTANT as records management can be to a company, records managers are often given the status of file clerks, Sherwood said, often making it difficult to convince management to spend money on updating equipment. She is director of policy services at League Insurance Cos. in Southfield.

When Sherwood's department members wanted equipment to set up a microfiche storage system, they needed to justify the cost to management. They explored how the new system could help other departments and itemized cost savings, mostly in paper expenses, from the current system.

The weekly report, a two-inch thick stack of paper, was delivered to management with two tiny sheets of microfiche on top. Attached was a note which said that with a file cabinet, the pocket-sized sheets would replace the stack of paper.

"The system was approved," Sherwood said.

Microfiche, as well as micrographics and magnetic tape, are replacing paper filing systems at many companies where records managers recognized the potential savings from the more advanced systems.

But even the most advanced system cannot help a company whose records are in disarray.

"If you can't manage the records, there is no reason to have them," Sherwood said.

ARMA's Detroit chapter, with 150 members and an annual budget of \$25,000, meets monthly to exchange information and discuss the progress of EFL, Elimination of Legal Size Files from records departments nationwide.

The organization, serving the tri-county area, also sponsors scholarships for records professionals and students. The professional award pays up to \$300 and the student award up to \$1,200. Sherwood can be reached at 557-1300; Matyn at 322-3880.

# JOBS

## Private Industry Council scrambles to find clients

Three years ago, Corinne Kelly was a 17-year-old single mother busing tables at two local restaurants and not making ends meet. Her mother called the Oakland County Private Industry Council for help.

Today, Corinne is employed in data processing by her local school district.

"I picked up on things pretty fast," she says of her on-the-job computer training experience. "Now I've got the health insurance, I bought a car and I'm going to move into my own place. I'd like to go to college some day."

PICS FREE services include workshops to assess experience and interest, develop resume writing and interviewing skills. Classroom and on-the-job training is offered in a spectrum of fields that include auto repair, machine, health care and computer repair.

"We groom that person, listen to their problems and try to make a marriage in terms of work," according to Harold McKay, PIC's area manager of employment and training.

"Youth is the hardest segment to reach," said Kathleen Strand, director of the Oak Park Community Employment Service. "I would also love to be able to recruit recently divorced females."

Dorothy Kultz agreed.

"A lot of people are eligible who don't think they are. We help the working poor as well as the handicapped and unemployed. We are really a grass roots programs that cares about helping people."

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include auto repair, machine, health care and computer repair.

"They (Troy VIP) send us qualified applicants. We will be reimbursed 90 percent of their first six months' salary in exchange for training. We give people a chance to be gainfully employed."

Local businesses are encouraged

to tap PIC's resources in meeting recruitment needs.

"PIC also meets the needs of local businesses through its pre-employment screening services and training programs tailored to individualized businesses."

Ted Meekin of Troy's DECO-GRAND explained how the program works in his plant where clients are trained in the use of computer-controlled numeric lathes, which turn and grind engine parts.

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## Numbers game hurts neediest

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