With the ongoing changes that are occurring in information technology and in records management, the Florida Records Management Association (FRMA) strives to ensure that records professionals have the knowledge and skills to do their jobs effectively, and obtain recognition for their professional accomplishments. The Florida Certified Records Management Program (FCRM) provides certification for the successful completion of training in Florida records management.

The goals of the FCRM certification program are to:
- Improve the effectiveness of Florida government records management.
- Give FRMA the ability to better assess the effectiveness of its training program.
- Raise awareness of the importance of records management in the local government.
- Increase the level of professionalism for those managing Florida records.
- Provide FRMA and Florida records professionals with benchmarks to gauge their professional development.

The FCRM program will meet these goals by encouraging FRMA members to take a series of FRMA training classes that will provide the core of records management knowledge and skills needed to effectively manage Florida records, and provide a blueprint for these individuals to follow to ensure a high level of professionalism. This program is administered by FRMA, in conjunction with the John Scott Dailey Florida Institute of Government, University of Central Florida (UCF-IOG).

CERTIFICATION PROGRAM

FCRM certification is available to FRMA members only. Members must work in a government agency Records Management department or work within a Records Management department in Florida. FCRM Certification training is based on the successful completion of 36 hours of curriculum within the following broad subject areas:

- Properly maintaining agency business records to ensure compliance with State and Federal laws and regulations.
- Effectively administering the agency records management program by developing policy and procedures, providing employee training and support, and working with the State Department of Library and Archives on records issues.
- Determining the extent of agency vital records and creating protection strategies through risk assessment, storage options, and cost requirements.
- Keeping updated on current technologies and records management responsibilities, especially regarding the creation, duplication, and storage of electronic documents and email.

CERTIFICATION

Members wanting to obtain FCRM certification must fulfill the following requirements within three years of starting the program:

1. Completion of thirty six (36) hours of FRMA approved training within three years.

2. Members must maintain continuous FRMA Membership.
   Please note: Must be a current member to receive FCRM credit hours.

3. One session of each of these courses is required for initial certification:
   Basic Records Management (4 hours), Disaster Planning and Recovery (2 hours), Legislative Update on Public Records Laws (2 Hours), Florida's Code of Ethics, Sunshine Law, and Public Records (2 hours), Advanced Records Management (22 hours), and (4 hours) * any selected mandatory courses the FRMA Board may add to the curriculum. Members may attend these classes as often as desired; however, Disaster Planning and Recovery will be credited toward initial certification only once in the two-year period.

4. All hours count toward the overall 36-hour requirement. (Any additional hours accrued will not carry over for recertification.)

RE-CERTIFICATION

In order to maintain the (FCRM) Florida Certified Records Manager certification, you must complete 18 hours of approved Continuing Education hours every two years.

Continuing Education

1. Re-certification of training is based on the successful completion of 18 hours of curriculum on page 7 within the following procedures:

2. Must complete eighteen (18) hours of FRMA approved courses within two years from the initial certification.

3. Must attend Advanced Records Management (8 hours), Disaster Planning and Recovery (2 hours), and Legislative Update on Public Records Laws (2 hours), Florida's Code of Ethics, Sunshine Law, and Public Records (2 hours), and (4 hours) * any selected mandatory courses the FRMA Board may add to the curriculum every two years for recertification. FRMA members may attend either class as often as desired; however, Disaster Planning and Recovery will be credited toward re-certification only once in the two-year period.

4. Only classes taken after the certification date will be counted toward the 18 hours for re-certification.

5. Basic Records Management is only required for initial certification.

6. Members must maintain continuous FRMA membership to maintain the FCRM certification.

7. FRMA will only accept credit for approved webinars and seminars. All request(s) must be made in writing to the Director of Education and approved 30 days prior to attending session(s).

Extensions

8. If the member does not meet the deadline for re-certification, the member must request in writing to the FRMA Director of Education to receive an additional six months to take the required Continuing Education hours and upon payment of the extension fee of ($20.00), the member will be placed on pending certification status.

Decertification

9. If a member is decertified, they must request in writing to the FRMA Director of Education to retake the sessions for certification within three months of decertification, providing that the member has obtained the required 18 Continuing Education hours, and paid the re-certification maintenance fee of ($40.00). If the member does not retake the session for the certification within six months of being decertified, the member will have to take the entire 36 hours of Records Management courses over again to receive the certification of FCRM designation.

Recertifying

10. The member must contact the Director of Education in writing that they will be re-certifying within three months of decertification. If the member fails to re-certify, the FCRM certification credentials will be decertified.

AREAS OF KNOWLEDGE

FRMA will provide training in the following areas that will provide participants with the information and knowledge that they will need to carry out their records management duties in support of business needs and in accordance with State and local government records management laws and regulations.

Training will be provided in the following areas:

- Records Management Overview
- Creating and Maintaining Information
- Records Scheduling
- Records Destruction and Off-Site Storage
- Asset and Risk Management
- Records Management Program Development
- Records Management: Definition and Components
- Overview of Laws and Regulations Relating to Records Management
- Records Management Documents and Records Schedules

Records Creation and Maintenance
- Definition of records, non-records materials, and personal papers
- Recordkeeping requirements: creation and maintenance of adequate and proper documentation
- Policies and procedures for managing business information and personal papers
- Electronic records management systems, such as records management applications (RMAs) and document management applications (DMAs)
- Design, development, and implementation of information systems to incorporate records management and archival functions
- Policies and procedures for managing electronic mail and word processing documents
- File plans
- Filing and storage procedures
- Permanent records in all media, with an emphasis on permanent electronic records
- Electronic and other special media records, including audiovisual, cartographic and architectural, and micrographic records
- Vital records, including policy, storage, and cycling
- Reference policies and activities

Records Scheduling
- Overview of scheduling process
- Records inventory: paper, electronic, and special media records
- Disposition instructions that take into account:
  - Agency business needs
  - Government accountability
  - Legal rights
  - Archival value
- Maximum use of the General Records Schedules
- Unique requirements for scheduling electronic records
- Unscheduled records
- Instructions for completing Request for Records Disposition

Asset and Risk Management
- Asset and risk assessment: purpose, frameworks, and procedures
- Assessment of problems
- Risk mitigation strategies
- Identification of priorities and resource allocation

Other
- Unauthorized destruction or alienation of Florida records
- Records management program audits and evaluations/inspections
- Records management training: requirements and procedures
- Resources for solving records management problems

Training Process

Training will be offered through classes at FRMA conferences, in a traditional classroom training setting.

Periodically FRMA offers online courses through The Florida State University Institute of Government (IOG). Members can obtain the information from the FRMA website. www.frma.org

Non-certified members can only attend Basic Records Management sessions at the FRMA conferences.

The Public Records Management Seminars offered by the State Library and Archives of Florida will be accepted toward certification for Certified FCRM members only. Certified FCRM members must complete a pre-approval credit request form and send to Education Director prior to attending session(s).

After completing State Library and Archives seminar(s), all certificate of attendance must be sent to the FRMA Director of Education to verify attendance for continuing education credit hours. Please note only four hours will count towards certification.

After obtaining thirty six (36) hours of training, University of Central Florida will certify the hours and a certificate of certification will be sent in mail.

FCRM Testing: A multiple choice test that consists of fifty (50) multiple-choice questions, with four answer choices each. Member must obtain at least thirty (30) correct answers to pass the test. All examination questions are in English. The questions are based on fundamental records and information management practices, and are meant to represent the best practices in the industry and the State of Florida.

FRMA Policy
Florida Records Management Association Certification Program

<u>Florida Certified Records Management Program (FCRM)   January 2018</u>

CURRICULUM: The core curriculum for the FCRM Program includes:

Class Title	Instructor	Credit Hours Non Certified	Credit Hours Certified
Basics of Records Management (not required for re-certification) − Identification of public records − Life cycle of records − Regulatory requirements − Public records requests − Confidential and exempt public records − Records inventory − Retention schedules − Disposition − Files management − Office of Open Government − The Brechner Center	State Library and Archives of Florida Conference - Approved Speaker	4	■
Advanced Records Management − Electronic records management − Email − Social Media − Records system design − Digital scanning and electronic document management − Micrographics − Archiving and historical documents − Vital records − Attorney General Opinions	State Library and Archives of Florida Conference - Approved Speaker	22	8
Disaster Planning and Recovery − Disposition of unrecoverable public records − Mold and mildew − Records and document recovery techniques − Disaster recovery vendors	State Library and Archives of Florida Conference - Approved Speaker	2	2
Legislative Update on Public Records Laws	Florida Attorney General Office First Amendment Foundation Conference - Approved Speaker	2	2
Florida's Code of Ethics, Sunshine Law, and Public Records − History of Florida's Ethics Law − Meetings in the Sunshine − Discussions covered by the Sunshine − Documents covered by the Public Records Laws	First Amendment Foundation Conference - Approved Speaker UCF-IOG or Attorney or Online	2	2

Class Title	Instructor	Credit Hours Non Certified	Credit Hours Certified
Writing Policies and Procedures − Definitions of Policies and Procedures − Writing instructions − Developing manuals and handbooks	UCF-IOG Conference - Approved Speaker	2	2
Various Training and Development Courses	UCF-IOG (See list below) Conference - Approved Speaker	2	2
		36	**18**

UCF Training and Development Courses (as available):

    Assertiveness Skills
    Body Language: Making It Mean Business
    Business Etiquette
    Change Management: Dealing With Change
    Communication Skills
    Cooperation: Oiling Your Office
    Creativity at Work
    Diversity of Age: Generations at Work
    Email Etiquette
    Emotional Intelligence: EQ vs. IQ
    Grammar Brush-Up
    Interpersonal Effectiveness: Communicating With Others
    Leadership Laws Series
    Leadership Lessons from Mr. Potato Head
    Leadership Secrets of Santa Claus
    Meeting Management: Making Meetings Work
    Memory Skills
    Minute Taking in the Sunshine
    Parliamentary Procedure
    Presentation Skills: Present like a Pro!
    Recognition Strategies: Whale Done
    Team Building and Conflict Resolution
    Others

Contributors to the original development of this policy in 2010-2011:

FRMA Education Committee: ....Patrick Mudd, FRMA President
....Archie Matthews, FRMA Vice President
....Nancy McConkey, Dir. Of Administration
....Lesa Canfield, Dir. Of Education
....Sandra Tuller, FRMA Secretary
....Rita Smith, FRMA Treasurer
....Florida State Dept. of Library & Archives
....University of Central Florida-IOG
Special Recognition:
FCRM Program Development:.....................Kimberly Ingram, CRM