







Karen M. Payne, CRM, CPO®

505.559.4760

karen.payne@imergeconsult.com

<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 classification development and the other fundamentals of 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 compliance improvements with user-friendly IG programs.</p>
<p>CONSULTING PROJECTS</p>    	<p>Southern Nevada Health District (SNHD), Las Vegas, NV. SNHD asked for assistance to develop a sustainable process for managing records and information. Project involved managing a 3,000+ storage box inventory, QC of scanned documents, policies and procedures review, records retention schedule review, risk assessment and strategic roadmap. Implementation to include policies and procedures development and review and training.</p> <p>State of New Mexico Higher Education Department (HED), Santa Fe, NM. To implement the new state functional retention schedule, the agency's records had to be evaluated. In just eight days, 650 student loan files spanning five years with trigger dates from 1992-2015, and 185 private post-secondary school files were dispositioned following the new state schedule (NMAC 1.21.2).</p> <p>Town of Cary, NC (population 140,000) engaged IMERGE to help customize the NC State Archives Retention and Disposition Schedule to fit the Town's needs. By consulting with subject matter experts across all departments, IMERGE developed a classification scheme and retention schedule and transformed the subject/department-based schedule into a functional one. Included were an assessment and gap analysis of ongoing records management practices and development of common terms (an agency-specific thesaurus) to effectively cross-walk the Town's existing records to the State Schedule. The resulting functional schedule better reflected actual business processes. Also included were an evaluation of the Town's public records and electronic messaging policies.</p> <p>Howard County Public School System (MD) (HCPSS) With no RIM or ECM system in place, HCPSS engaged a team of consultants to develop an enterprise-wide approach to ECM and RIM. Project included a</p>

	<p>records inventory constructed from over 60 surveys and interviews of administrative departments. By this method, records types were identified; a functional records classification and taxonomy were created; and, through research of applicable governing Federal and state laws and statutes, data was developed for a functional retention schedule. A new records management policy was developed and enterprise-wide training to HCPSS staff was delivered. As a follow-up, a deeper-dive, more granular and extensive file plan was developed for the Human Resources, Finance, and School Construction.</p> <p>Additional public-sector RIM/IG clients include the Wisconsin municipalities of Waukesha, Brookfield, Elkhorn, Manitowoc, and Madison. These Wisconsin projects included municipal utilities (water, electric, and waste management), public safety, and even a cemetery. Wisconsin projects included negotiating with the Public Records Board for approval for municipality-specific records. Records schedule enhancement, Aspen, CO. All projects included the development and/or update and implementation of a retention schedule.</p> <p>Private-sector RIM/IG, market research, and ISO certification projects include Volvo Trucks of North America, Gilbarco Veeder-Root, Ecolab, Journal Communications, the Davis & Kuelthau law firm, and The Ad Council. More information available on request.</p>
<p>EXPERIENCE</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 (VNA), Greensboro, NC</p> <p>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</p>

EDUCATION	<p>BA, Political Science/Sociology, East Carolina University MBA, Marketing/Finance, Wake Forest University</p>
CERTIFICATIONS AND AWARDS	<p>Certified Records Manager (CRM), 2006–present. Certified Professional Organizer (CPO®), 2007– present. Distinguished Toastmaster, 2015. Toastmasters International.</p>
PRESENTATIONS	<p>ARMA, Northern New Mexico, Santa Fe, NM. “Taxonomy, Classification, and File Plans”, February 2018 ARMA, Northern New Mexico. “Taxonomy and Classification: A Distinction Without a Difference”, May 2015. ARMA, Northern New Mexico, 2015 Information Governance Conference, Santa Fe, NM. “Fundamentals of Information Governance”, April 2015. ARMA, Rio Grande Chapter, Albuquerque, NM. Co-facilitator, “ICRM Examination Prep Workshop”, January 2014. ARMA International Conference, Las Vegas, NV. “Toward a Better IT-RIM Conversation”, October 2013. ARMA, Southwest Region, San Antonio, TX. “Let’s Improve the RM-IT Conversation”, ARMA SW Regional Conference, May 2013. ARMA, Rio Grande Chapter, Albuquerque, NM. “Shall We Dance? A Better Dialog Between RM & IT”, April 2013. ARMA, Rio Grande Chapter, Albuquerque, NM. “The Principles® and RIM”, April 2012. ARMA, Northern New Mexico Chapter. “The World According to GARP® and the Information Governance Maturity Model”, Spring Seminar, April 2012. ARMA, Rio Grande Chapter, Albuquerque, NM. “Whelmed to Underwhelmed: Meeting Productivity Goals”, January 2011.</p>
PROFESSIONAL	<p>Association of Records Managers and Administrators (ARMA), Boards of Directors positions (member since 1990): Northern New Mexico ARMA (NNMARMA), Santa Fe: President, 2015-present; 2015-16 Chapter Leader of the Year; Director, Membership and Recruitment, 2014-15. Rio Grande Chapter, Albuquerque: VP, Membership, 2007-10. ARMA Milwaukee Chapter: VP, Membership, 2003-06, and Chapter Member of the Year, 2004-05, and recognition by ARMA for Milwaukee Chapter membership recruitment. Association for Information and Image Management (AIIM), Member, 2014–present. American Society for Training and Development, NM Chapter (ASTD-NM), Board Administrator, 2008-2011.</p>