

**MAY
2004**

PRESIDENT’S CHATTER

By Priscilla Jaron

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The annual spring seminar on Privacy and Records Management turned out to be a very successful event. We received very favorable ratings from all of the attendees. The speakers did an excellent job of holding everyone’s interest, and each one had different information to provide to us. The vendor fair was new this year and went over very well. We left plenty of time at the breaks for attendees to meet with the vendors. Overall this was an excellent learning and networking experience for all attendees.

If anyone has a topic they would like for next year’s seminar, pass it on to Ana. It’s never too early to plan. I would like to thank Ana and the other members on the planning team (Lori Ashley, Ruth Breunig, Pam Duane, Tim Hughes, and Diane Vultaggio), as well as any others who assisted, for pulling together all the details to make this successful.

It’s hard to believe that we have the last program of the year coming up. You should have received your flyers by now and I urge you to sign up. The tour of the Epic Center will prove to be very interesting. This is also our annual awards and election night and an opportunity for you to say thanks to board members and others who make these monthly meetings informative sessions for you.

For those of you who can’t make it to the meeting, have a safe and enjoyable summer and see you in the fall!

ARMA*Adison*

*ARMA**Adison* is published monthly from September through June. We welcome all letters, comments, and contributions from members. Send to:

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April ARMA Madison Seminar Attendees: Ana Aquino-Perez, Tim Hughes, Pat Peirce, Rosemary Stark, Ruth Breunig, Janet Nelson, Diane Vultaggio, Pam Duane, Priscilla Jarona, Nan Kunde, Karl Wellensiek, Harold Coltharp, James Page, Mary Boneck, Steve Bose, Bonnie Eustice, Charles Poole, Steve Spielbauer, and Sarah Schild

ARMA MADISON WEB SITE

<http://archives.library.wisc.edu/armad/armad.htm>

Check the ARMA Madison Web site frequently as new information is posted as it becomes available.

The information contained in this newsletter does not necessarily reflect the views of the membership or the editor, nor is there any endorsement of ads, seminars, articles, or commentaries intended. Contributions or gifts to the Association of Records Managers and Administrators, Inc. are not deductible as charitable contributions for U.S. Federal Income Tax purposes.

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FROM ARMA HEADQUARTERS**ARMA International's Washington Policy Brief**

This monthly online advisory contains brief summaries of recent legislative and regulatory issues that may affect the records and information management profession. Further information about the issue is accessed by clicking on the link provided at the end of each summary.

For continually updated information and intelligence about the legislative and regulatory news that affects you and your organization, go to <http://www.arma.org/legislative/uslegreg.cfm>

**FREE WHITEPAPER: "DRIVING BUSINESS VALUE WITH DOCUMENT MANAGEMENT"
Market Realities and Practical Guidelines for Mid-Sized Companies**

"A mid-sized company needs to 'do more with less' in a far more compelling way than a Fortune 500-class organization. It may have the same document issues as its larger brethren -- regulatory compliance, for example...In the mid-market, budget and IT staffing levels simply do not support an all-embracing content management initiative that might cost hundreds of thousands of dollars and take months to implement."

Find out why document management matters and how to make it work with this free paper authored by Kinetic Information.

FTC Requests Input on Record Disposal Regulation

The Federal Trade Commission (FTC) is seeking public comment on a [proposed rule](#) regarding the proper disposal of consumer report information and records under the [Fair and Accurate Credit Transactions Act \(FACTA\)](#) and the Fair Credit Reporting Act (FCRA). FACTA, which was enacted on December 4, 2003, amends the FCRA and directs the FTC, the Federal Reserve Board, the Office of the Comptroller of the Currency, the Federal Deposit Insurance Corporation, the Office of Thrift Supervision, the National Credit Union Administration, and the Securities and Exchange Commission to coordinate with one another to adopt comparable and consistent rules regarding the disposal

of sensitive consumer report information. Comments on the proposed rule must be received on or before June 15.

FTC Asks for Public Views on Identity Theft Proposal

The Federal Trade Commission is seeking public comment on proposed rules under the Fair and Accurate Credit Transactions Act) regarding further definition of the terms "identity theft" and "identity theft report," the duration of active duty alerts, and the appropriate proof of identity needed by consumers to block fraudulent trade lines in their consumer reports, place or remove fraud or active duty alerts, or obtain a file disclosure containing a truncated Social Security number under certain circumstances.

ADVERTISE WITH US IN THE ARMA MADISON NEWSLETTER

Want more exposure to your chapter members? You can advertise in our chapter newsletter. Annual advertising rates are \$100 for up to a half column ad. This rate is for approximately 10 issues. You may change your ad anytime throughout the year.

Your continued support for the Madison chapter of ARMA International and the profession of records and information management is always appreciated.

Please send a camera-ready artwork copy of your ad and a check payable to ARMA Madison to P.O. Box 8863, Madison, WI 53708-8863. The electronic file of the artwork can be sent directly to the newsletter editor at rosemary.stark@strand.com.

If you have any questions, please contact Priscilla Jarona, President (608-458-3320), or Tim Hughes, Treasurer (608-252-4799).

MARK YOUR CALENDAR

July 16-18, 2004: Great Lakes Leadership Conference, Detroit, Michigan

RECIPES

Farmers' Market. That says spring is here! These recipes take advantage of the abundance of rhubarb, asparagus, and Vidalia onions that show up at the market.

Rhubarb Nut Bread

1 1/2 cups brown sugar
2/3 cup oil
1 egg
1 cup buttermilk or sour milk
1 teaspoon salt
1 teaspoon soda
1 teaspoon vanilla
2 1/2 cups flour
1 1/2 cups diced rhubarb
1/2 cup chopped nuts

Mix first four ingredients and blend in dry ingredients. Fold in rhubarb and nuts. Pour into two greased and floured loaf pans. Top with 1/2 cup sugar and 1 tablespoon butter, which has been mixed together. Bake at 325° for 45 to 60 minutes. Freezes well.

*Rhubarb Bars*

1 cup flour
5 tablespoons powdered sugar
1/2 cup butter

Pat into 9x13 pan; bake 12 minutes at 350°.

Mix the following together and pour over the crump mixture:

2 eggs, beaten
1 1/2 cup sugar
1/4 cup flour
1/4 teaspoon salt
1/2 teaspoon vanilla
2 cups finely chopped rhubarb

Bake at 350° for 35 minutes.

Vidalia Sweet Quiche

25 whole soda crackers
3 medium Vidalia onions, sliced thin
1/4 lb butter or margarine
2 cups milk
5 beaten eggs
1 teaspoon salt
Pepper to taste
1 teaspoon Accent or seasoning salt
2 cups sharp or medium cheddar cheese, grated

Sauté the onions in butter. Place crackers in casserole. Layer the onions on the crackers. Mix eggs, salt, pepper, milk, and Accent. Pour over onions and top with cheese. Bake at 350° for 30 minutes in 9x13 pan. Cover with towel for 15 minutes before serving. Serves 8.

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PRIVACY & RECORDS MANAGEMENT – SPRING SEMINAR

By Rosemary Stark

The Madison Chapter of ARMA and the Wisconsin Public Records Board held an all-day Seminar titled “*Privacy & Records Management*” on April 20 at the Exhibition Hall of the Alliant Energy Center in Madison.

After opening remarks by President Priscilla Jarona, Russ Whitesel from the Wisconsin Legislative Council and the Wisconsin Public Records Board, opened the morning sessions. He gave a brief introduction of the issues and challenges that new privacy laws and regulations have created for the efficient and effective management, preservation, and disposition of records. He emphasized that balance must be maintained between the public and private sectors. Mr. Whitesel had two points to make:

1. Everything relates.
2. NIASAIS: Nothing is as simple as it seems.

Bob Tillman, the Director of Public Relations and Political Advocacy for ARMA International, addressed *The Privacy Landscape*. He began by saying that record managers made the perfect privacy officers, but the jobs have gone to attorneys because of the laws enacted (need to be a lawyer to understand them).

“Privacy is about a person’s power to control whether their own personal information remains private, unless they specifically permit its use.” In the business world this takes on a different meaning: “The more a company knows about you the better it can market to you.”

There is a vast difference between European countries and America regarding privacy. Their laws are a result of Nazism. EU countries passed more stringent laws in 1981 guaranteeing privacy rights. Mr. Tillman mentioned that Wisconsin is one of the ten most secure states in the United States. A situation that may become a problem is outsourcing to other countries that do not have privacy laws.

Bob mentioned that a person’s Social Security number gets access to everything. An individual should refuse to give it out and should remove it from checks, insurance cards and any other item that it is printed on. Do not carry the card in your wallet.

Be wary of the information you use or post on your computer. When disposing of your outdated computer, the information on your hard drive has to go through seven cleanings before all information is deleted. Bob said a “record is anything opposing counsel says it is.”

He wrapped up his comments by saying that the records managers are the last bastion of information.

Carmen Brandt, CRM, CDIA, from KeyMark West presented *Information Security and Fraud Prevention Utilizing RIM Principles*. She suggested that records managers start mapping the information in an office to see who “touches” the information and how often. “It’s all a record – even if it is in a database.”

In her work with the casinos in Nevada, Carmen has developed plans for maintaining the integrity of a business or organization. One of her main points is that **someone should be watching. Don’t assume everyone is honest.** People are becoming more brazen when it comes to stealing information. Organizations need to set up security measures such as passwords to make it more difficult to obtain personal information.

Fraud is another big problem with \$600 billion being lost to fraud in 2002. The average fraud scheme is not detected for 18 months. There are three types of fraud: asset misappropriation, corruption, and fraudulent statements. Fraud is most often committed by someone you would not suspect. Separation of duties can be a big deterrent to fraud.

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Privacy & Records Management

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The newest crime is identity theft, and 1 in 5 people will become victims. Carmen said each individual should be careful how personal information is disseminated. Don't give out information unless you know who you are giving it to. You can sidestep some of the areas where personal information is asked just by refusing to give it. Many of your transactions can still be carried on. You need to be proactive!

Internal controls can be built into information management systems to eliminate opportunities for fraud and information theft. Capture and manage the information as it is created or when it enters an organization. Management at the front end is the key to protecting your and business assets.

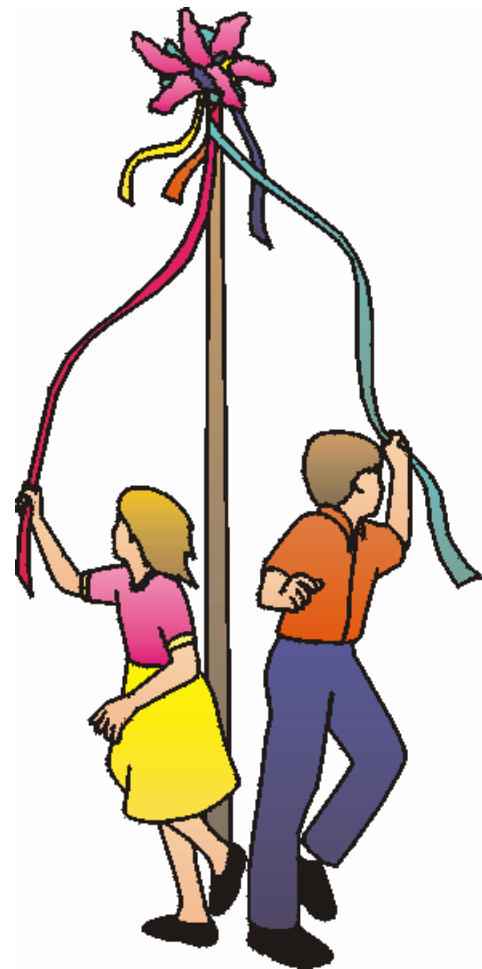
Tim Kelley, opinion page editor for the Wisconsin State Journal, shared media perspectives on **Privacy & Technology**. This issue draws a lot of attention, especially since the Patriot Act has been passed. The question on where to draw the line between the public right to know and the personal right to privacy is a problem for the media. Information is available from many sources, waiting to be "mined" from easily obtained databases from numerous sources. Some, such as the DNA databases, have been put to good use in freeing individuals wrongly accused of a crime.

Any time you give information out about yourself you have inadvertently provided fodder for a database maintained by someone. Tim referred to this information as the *matrix*, which combines information about individuals from government databases and privates sector data companies. "The states run it, feds fund it, private company maintains data."

Tim stated that we need to restore some checks and balances on information collections. He said we are edging away from fundamental principles of privacy. Our most valued right is to be left alone.

James McDonnell and James Wisniewski from the Wisconsin Department of Transportation teamed up to present the challenges of **getting "IT" right**: building, implementing, and maintaining technology infrastructure that can meet business and privacy requirements for the agency and its stakeholders.

They emphasized IT has the truck to haul the data: the treasure, which is owned by someone else. It is important for the *owner* and the *trucker* to work together. Without cooperation, the data does not get managed in ways that meet laws and regulations. Data takes a variety of formats, and all entities must be in tune so that data maintains its public or private nature.



Recipes

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Asparagus Onion Casserole

- 1 pound fresh asparagus, cut into 1-inch pieces or 2 packages (10 ounces each) asparagus cuts, thawed
- 2 medium onions, sliced
- 5 tablespoons butter or margarine, divided
- 2 tablespoons flour
- 1 cup milk
- 1 package (3 ounces) cream cheese, cubed
- 1 teaspoon salt
- 1/8 teaspoon pepper
- 1/2 cup shredded cheddar cheese
- 1 cup soft bread crumbs

In a skillet, sauté the asparagus and onions in 1 tablespoon butter until crisp-tender, about 8 minutes. Transfer to an ungreased 1 1/2-quart baking dish. In a saucepan, melt 2 tablespoons butter. Stir in flour until smooth. Gradually add milk. Bring to a boil; cook and stir for 2 minutes or until thickened. Reduce heat. Add cream cheese, salt, and pepper; stir until cheese is melted. Pour over vegetables. Sprinkle with cheddar cheese. Melt remaining butter; toss with bread crumbs. Sprinkle over casserole. Bake, uncovered, at 350° for 35-40 minutes or until heated through. Serves 4 to 6.

GREAT QUOTES

Imagination is more important than knowledge.

Albert Einstein

PRIVACY & YOUR RECORDS

By Ana Aquino-Pérez

If you missed our chapter's spring seminar, you missed out on a great opportunity to get some great information on the issues of privacy and managing your records.

Seventy-three people attended our chapter's 2004 Spring Seminar "***Privacy & Records Management***" on Tuesday, April 20, 2004, at the Exhibition Hall of the Alliant Energy Center in Madison, Wisconsin. It was a great day for education, exchanging ideas, and networking. The seminar was designed to raise awareness, stimulate dialogue, and help records managers, IT professionals, and business managers fulfill their dynamic role in planning and implementing for compliance in today's information-rich environments.

Once again state government employees were the largest percentage of the audience. That number included a mix of computer technology specialists, program managers, and members of the records and archives communities. Other participants attending represented private sector industries such as insurance, utility companies, law firms, consultants, and small businesses.

This year, the chapter provided scholarship opportunities for students to attend the seminar. Nancy Gustavson from Madison Area Technical College and Jamie Healy-Plotkin from the UW-Madison School of Library & Information Studies were awarded scholarships to attend this year's seminar.

The seminar, co-sponsored by the State of Wisconsin Public Records Board (PRB), had something for everybody. Russ Whitesel, from the Wisconsin Joint Legislative Council and PRB member representative, opened up the morning sessions by introducing the issues and challenges that privacy and records management present to our professions.

During the morning sessions, Bob Tillman, from ARMA International, addressed ***The Privacy Landscape in America*** where he explored the new laws and regulations recently enacted. Carmen Brandt, from KeyMark West, identified the critical issues relating to information, fraud, and identity security during her presentation on ***Utilizing RIM Principles to Advance Information Security and Fraud Protection***.

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Privacy & Records Management

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During the afternoon sessions, Tim Kelley, Opinion Page Editor from the Wisconsin State Journal, shared media perspectives on privacy during his session on **Privacy & Technology: A Media Perspective**. James Wisniewski and James McDonnell from the Wisconsin Department of Transportation teamed up for the last presentation of the day to introduce the challenges of **Getting "IT" Right**: building, implementing, and maintaining technology infrastructure that can meet business and privacy requirements for the agency and its stakeholders.

Seminar participants also had the opportunity to visit with vendors during the vendor fair. Representatives from various companies were available to share their expertise in information and records management, to talk about their service offerings, and demonstrate their solutions. Participating vendors included Pellitteri Waste Systems; Cities Digital Solutions, Inc.; Kard Recycling Service, Inc.; Iron Mountain, and MTM, Inc. Datakeep, Inc. and SourceCorp were our seminar lunch sponsors. A vendors' prize drawing was one of the highlights of the day. Several participants received several prizes donated by Iron Mountain and Pellitteri Waste Systems. Ana Aquino-Perez won the TV/DVD combo prize drawing donated by Pellitteri Waste Systems. Following her agency's policy, Ana turned in the prize to her department for departmental use.

Program evaluations rated presentations, speakers, and the facility highly. ARMA's primary role is education and professional development, and this seminar accomplished that goal. To further that goal, the chapter donated \$250 to the ARMA International Educational Foundation on behalf of the seminar speakers. Thanks to the work of seminar committee members and the donations of member companies, it was also a financial success. After all expenses, the Chapter netted over \$2,500 for future Chapter efforts.

The seminar would not have been made possible without the help and support of a great seminar committee and chapter members that were willing to get involved and offered their help to make this seminar possible. Our thanks go to all of them!

ARMA Seminar Committee Members:

Ana Aquino-Pérez, Seminar Chair
Wisconsin Dept. of Transportation

Diane Vultaggio, Publicity, Certificates
Wisconsin Dept. of Employee Trust Funds
Tim Hughes, CRM, Seminar Registrar
Madison Gas & Electric Company
Pam Duane, CRM, Facilities & CRM Credits
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Ruth Breunig, Vendor Liaison
Alliant Energy
Priscilla Jarona, Vendor Liaison
Alliant Energy
Lori Ashley, Publicity & Education Liaison
Cohasset Associates, Inc.

ARMA Seminar Donated Services

In addition, the seminar had the following donated services and seminar sponsorship from member companies and organizations:

Brochure layout & certificates of completion: Marilyn Jafferis – **ETF**

Brochure printing: **Alliant Energy**

Web publicity: **UW-Madison**

Registration, confirmations, mailing: **MG&E**

Printing speaker handouts, seminar packets: Pat Peirce – **American Family Insurance**

Vendor registrations, confirmations: Shirley Guimond – **Alliant Energy**

Vendors Placards: Mary Kirkpatrick: **WisDOT**

Seminar day registration: Chuck Poole – **Foley & Lardner**

Seminar luncheon sponsors : **Datakeep, Inc. and SourceCorp**

Financial Report

Total Receipts \$7,500 Total Expenditures (\$4,498)
Net Revenue \$2,507

Thanks to all for your hard work and for your help in providing a solid records management educational experience in our community.

RETIREMENT IS WONDERFUL!

By Helen Flores

I recommend it highly. Cruz and I are spending time with our family and especially enjoying the grandchildren.

Cruz is doing woodworking and just finished a table for 19-month old Hannah. He's also started a new sewing table for me, and will make more picture shelves for family and friends.

My original quilt, "Arbolito" (Little Tree) won 2nd place Viewers choice, out of 200 entries, at the Sun Prairie Quilt show in March. It's an original design, and I did all the applique and patchwork on the top. Sue Vollbrecht of Monona machine-quilted it. As you may imagine, I am insufferably proud of this and view it as a sign that leaving records management for fabric was the right choice. (Please see Page 11 for a photo of this gorgeous quilt.)

I took a class to learn to do my own machine quilting and am making baby quilts. Baby quilts are more fun than anything, and I also can develop my skill and practice quilting on small projects before tackling larger ones. And I know lots of babies and children who need them.

Otherwise, we're a bit ahead on the yard work and planning to garden more. We also plan to take a circle tour of the Great Lakes when the weather warms up. Life is good.

SEMINAR PICTURES



Priscilla Jarona, President, welcomes attendees to the Spring Seminar.



Ana Aquino-Perez, VP of Seminars, addresses the attendees.

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More Seminar Pictures

(Cont. from Page 9)



Bob Tillman, ARMA International, speaks on the Privacy Landscape.



Attendees visit vendors during a break.



Carman Brandt, CRM, CDIA, Keymark West, discusses some methods to protect information.



Attendees listened intently to a speaker.

ARMA MADISON WANTS YOU!

Actually, Ruth Breunig, VP Programs, is looking for some enthusiastic members to assist her with the program lineup for 2004-2005. Ruth would be happy to have you work with her or make suggestions to her for programs/speakers for the coming year. Ruth can be reached by phone (608) 458-4808 or e-mail ruthbreunig@alliantenergy.com She welcomes your input.

ARMA INTERNATIONAL EDUCATIONAL FOUNDATION HIGHLIGHTS

The ARMA International Educational Foundation (AIEF) Board of Trustees met in February to review last year's progress and begin making plans for 2004. The first research project, *Legal Obstacles to E-Mail Message Destruction*, was a success. AIEF is planning one, maybe two, follow-up projects to be presented at the Long Beach conference this fall.

AIEF has premiered a newsletter that may be found on its Web site, www.armaedfoundation.org Check it out for more information on the foundation's strategic plan and other plans for the future.

ARMA members have been generous to the foundation. Pledges and one-time gifts to date total \$151,500



Arbolito, by Helen Flores

