



PRESIDENT'S BLOG

By Ana Aquino-Perez

October 2007

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We had a great start this year with our September 11 program on Business Resumption. Paul Bergee presented some great information that we were able to take back to our businesses to check on our current plans and ensure we are ready for any disaster.

October comes full of activities and opportunities for all ARMA members. The ARMA International Annual Conference in Baltimore is fast approaching October 7-10. You still have time to register. This is one of the few opportunities available to get training in several areas of records and information management that otherwise would not be so easily available. If you are attending the conference, don't forget to join our Great Lakes Region Chapter Member of the Year Toast. The event is lots of fun. It is a chance to share some camaraderie with our other region's chapters and honor those that have made significant contributions to our chapters this past year. In addition, don't forget the annual tradition of exchanging chapter's pins at the conference. If you need some of our chapter pins to take part in this ritual, contact Diane Vultaggio. She will provide you with a few of our chapter's pins for you to exchange.

Our upcoming program will be held on October 16 at American Family Insurance Company on Madison's east side. The topic is *Cybersleuthing*. Doug Elrick will present a guide to the essentials of electronic discovery. Do not miss this presentation! Electronic discovery is one of the hot topics of the day and we want to make sure we are not caught off guard.

AnyDoc Software is sponsoring a free seminar on imaging in Waukesha. The seminar: *"How to Benefit from Imaging: Emerging Technologies in Scanning, Data Capture and Content Management"* will discuss how to:

- Reduce the inefficiencies caused by misrouted and lost documents.
- Eliminate the hidden costs associated with manual data entry.
- End the need for costly physical document storage and retrieval.

I hope you take advantage of these opportunities available to you to expand your information management knowledge. I look forward to seeing you soon.

TELL US HOW TO GET IN TOUCH WITH YOU!

Help us keep in touch with you, our greatest resource—ARMA-Madison Members! We use e-mail often to update you on happenings of our chapter. Make sure we have your correct e-mail address and, as always, your current postal address.

September Attendees: Ana Aquino-Perez, Jodie Armstrong, Paul Bergee (speaker), Matt Berrigan, Carrie Brudo, Thom Dahlen, Pam Duane, Roger Housner, Tim Hughes, Priscilla Jaron, Janet Nelson, Rosemary Stark, Yvonne Subak, and Diane Vultaggio.

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ARMA MADISON WEB SITE
<http://www.armamadison.org/>

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

MARK YOUR CALENDAR

October 7-10, 2007: *Are You Up to the Challenge of Managing Records & Information*, ARMA International 52nd Annual Conference & Expo, Baltimore Convention Center, Baltimore, MD

October 11, 2007: *Evolution of Forms*, BFMA Madison 30th Anniversary Celebration, Inn-on-the-Park and Great Dane Pub, 12-7, chenry@amfam.com or call (608) 242-4100, ext. 31532.

October 16, 2007: *Cybersleuthing: A Guide to the Essentials of Electronic Discovery*, Doug Elrick, ARMA Madison Chapter, American Family Insurance, late p.m.

October 24, 2007: *Giving Depositions*, Jonathon Cooper. ARMA Milwaukee Chapter, www.armamilwaukee.org

November 13, 2007: *Tour of the Wisconsin Department of Revenue*, ARMA Madison Chapter, late p.m.

December 11, 2007: *Financial and Consumer Fraud Protection-Protect Yourself*, Jeanne Benink, ARMA Madison/BFMA, Inn-on-the-Park, 7:30 a.m.

May 4-8, 2008: BFMA 2008 Symposium, Las Vegas, NV

IT'S NOT TOO EARLY!!

December 11, 2007, is the joint meeting of the Madison Chapter of ARMA and BFMA. This is always a charity event with a raffle sale of donated items with proceeds going to preselected local organizations. Start preserving that produce from your garden by making jams, jellies, salsas, sauces, and anything else that appeals to the senses. Get out the hammer and glue gun! Click those knitting needles/crochet hooks! All donations to the raffle are welcome.

Hope your projects are in high gear. Let's make this the best year ever!

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HIGHLIGHTS FROM ARMA INTERNATIONAL

Technical Report on Managing Electronic Messages Released

Procedures and Issues for Managing Electronic Messages as Records – This ANSI/ARMA Technical Report, which is the implementation guideline for the ANSI/ARMA Standard, *Requirements for Managing Electronic Messages as Records*, addresses concerns typically confronted during the implementation and management of any text-based electronic messaging system or communication, such as e-mail or instant messaging.

The new technical report is now available as a PDF download in the ARMA [bookstore](#). The print version will be available in mid-October 2007.

2007 Electronic Records Management Survey Results Now Available

Results from the Cohasset/ARMA/AIIM Electronic Records Management Survey, conducted earlier this spring, are now available. An executive summary is available free to ARMA International members at www.arma.org/pdf/news/2007erecordssurvey.pdf. Complete results are available in the white paper [Electronic Records Management Survey: A Call for Collaboration](#), prepared by Cohasset Associates.

From this summary, you will see that although progress has been made in some areas, there is still a need for action to better manage electronic records. For example, 40% of the organizations represented still don't include electronic records in their retention schedules. Even more disconcerting, almost 40% do not have a formal records hold order system in place, and 44% don't include electronic records in their records holds. The report contains valuable information you will want to share with your associates and management.

ARMA International is pleased to have once again co-sponsored the survey and trusts you will find the survey report useful.

Again, the complete report is available for download free of charge from Cohasset's MERresource.com portal at www.MERresource.com/whitepapers/survey.htm.

GREAT QUOTES

Unless you walk out into the unknown, the odds of making a profound difference in your life are pretty low.

Tom Peters

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ASSESSING YOUR CURRENT BCP STATUS

By Rosemary Stark

Is your business prepared for a disaster? If you have a business continuity plan (BCP) in place, will it work? Paul Bergee, CBCP, Bergee Business Continuity Planning LLC, gave attendees of the September 11, 2007, meeting of the Madison Chapter of ARMA some things to think about as he gave a presentation on disaster planning. He provides business continuity consulting to health care organizations, manufacturing, financial institutions, and nonprofit organizations. He previously was the Director of Business Continuity Planning for CUNA Mutual Group in Madison. Besides the position with CUNA, Paul also served on the Disaster Recovery Institute International Certification Board, was founder and past president of the Business Disaster Recovery Planners Association of Wisconsin, and helped coordinate business and municipal testing for United States and international cities.

Organizations of 1,000+ have a fair to good continuity plan, small organizations had poor to very poor plans, and the status of government agencies is unknown. When Paul asked the attendees if their business had a BCP, about one-fourth of the group raised their hands.

Paul presented four assumptions a business should make: (1) assume you will be on your own in a disaster; (2) assume that insurance is only part of the solution; (3) assume that your BCP response needs to start within minutes of the disaster; and (4) assume that a disaster or business interruption can occur at any time.

There are a number of ways to measure the organization's BCP. An organization can ask for an audit, get a checklist, buy a software package, hire a consultant, conduct a live test, go to a conference, and last, become paranoid.



Paul Bergee, CBCP, Bergee Business Continuity Planning LLC talked about tasks that should be implemented in a BCP.

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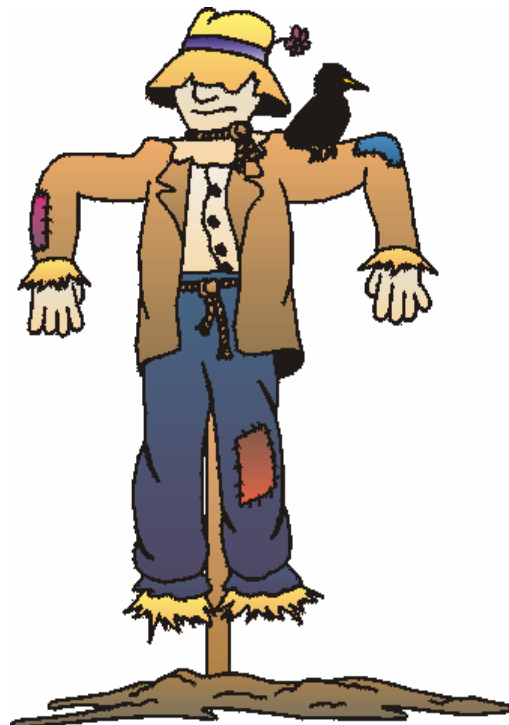
Assessing Your Current BCP Status

(Cont. from page 7)

Paul provides checkpoints, audit, and preparation items organizations should address in their business interruption planning program. Points are scored for response details, Command Center details, predisaster details, and additional details. Some of these checkpoints include your response activation procedures, Command Center location, media management, employee management, Command Center and building security, training response teams, and testing of the BCP.

Each item receives one point to be scored for a maximum of 52 points. If your score is 52, you have a good chance of surviving a disaster. If your score is less than 52....

Although Paul's checklist is geared to businesses, many of the items on his checklist could be applied to our families. We may know where our important papers are kept, but do others in our family have a clue. Have we prepared a contact plan if a tornado, flood, or fire occurs? How long before the family is "back in business?"



Discover How To Benefit From Imaging



How to Benefit from Imaging: Emerging Technologies in Scanning, Data Capture and Content Management

You are invited to have lunch with us at Microsoft's facility in Waukesha, Oct. 11th. Join panel members Mike York of Assertive Systems, Scott Lewis of Computhink and Mary Wagner-Webb of AnyDoc Software for an educational lunch-and-learn seminar.

Time:

October 11th, 2007
Registration: 11-1130 am
Seminar & Lunch: 1130 am - 2pm

Location:

Microsoft Seminar Facility
N19W24133 Riverwood Dr
Suite 150
Waukesha, WI 53188
ph: 262-446-5200

Register at:

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