



## PRESIDENT'S BLOG

By Ana Aquino-Perez

Summer 2008

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It is time once again to reflect on our last year – our accomplishments and our lessons learned. Our last program year has gone by in the blink of an eye. Where did the time go? As we examine our accomplishments and the goals we set for the chapter, it is hard to believe we have already completed our program year.

We had a wonderful year that included very good programs and a great seminar, which were all very well-attended and well-received by all the participants. We also had special events that added additional excitement to the year.

The program committee delivered an array of programs that included programs on how to assess our organizations' business continuity programs, how to develop functional retention schedules, and tours of Department of Revenue and its paperless program and MTM and its imaging processes. Doug Elrick gave us a guide to the essentials of electronic discovery and our joint program with BFMA showed us how to protect ourselves from financial and consumer fraud. A harsh winter storm forced us to cancel one of our most popular programs of the year at the last minute, our holiday program, and we had to scramble to inform our members of the last minute cancellation. However, this was a catalyst for us to develop and implement a new policy and procedure on how to deal with last-minute program cancellations.

We partnered again this year with one of our member vendors to hold our second annual community-shredding event during Records Information Management (RIM) month. Our first event was so successful the year before that we decided to make it an annual event for our chapter. The event brought in large crowds again and we were able to get some press coverage. Our spring seminar continues to be one of our most sought out events which brings a very diverse group that looks forward to this educational opportunity. This year we had a great program and a great vendors' fair with an increased number of new participants. In summary, it was a great program year!

With this newsletter issue, I close up my appointment as chapter president and welcome and congratulate the new board. We have great new leadership lined up that includes two brand new members. They will continue to lead the chapter into the new program year. They are ready to lead and to face any new challenges put in front of us.

The last three years have been a wonderful experience for me as the chapter president. I had the privilege of working with a wonderful team in our board of directors. They certainly made my job not only easy but also exciting and fun. Their commitment to the chapter and their abilities and skills in making things happen made it very easy to preside over the chapter. Who could ask for anything more?

(Cont. on page 10)

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## 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.

## MARK YOUR CALENDAR

**September 16, 2008:** Watch our Web site <http://www.armamadison.org>

**October 20-23, 2008:** 53<sup>rd</sup> Annual ARMA International Conference and Expo, Las Vegas, NV

**April 29, 2009:** Spring Seminar, Fluno Center, Madison, WI

## **HIGHLIGHTS FROM ARMA INTERNATIONAL**

### **Strategic Planning Committee Examines Visible Future**

What will the future bring? That was the question at the core of ARMA International's Strategic Planning Committee's meeting in Kansas City, Aug. 1-3. Much of the committee's discussion focused on the visible future for the profession and the association to determine if major changes were needed in the association's strategic direction. By close of the meeting, the committee had revised the association's [vision and mission, and radar screen issues](#). The revised documents have yet to be approved by the Board of Directors, but are available online in the Governance section of [My ARMA](#) for [member review and comment](#).

### **RIM for IT Guideline Task Force Needs Volunteers**

Recent changes in privacy laws and rules regarding electronically stored information are requiring IT managers and records managers to work together more often to build an information architecture that incorporates the needs of information technology and records management. To facilitate this process, ARMA International is developing a new guideline titled "Records and Information Management for Information Technology Professionals" – and help from volunteers like you is needed.

This guideline will demonstrate the relationship between IT and records management, describe the processes and drivers for each, and demonstrate how the two organizations can be structured to work together.

If you have experience in this area you're willing to share, go to [www.arma.org/standards/development/standardsprogress.cfm](http://www.arma.org/standards/development/standardsprogress.cfm) and apply today.

### **Work Begins on Records Management Maturity Model**

ARMA International has teamed with the U.S. [National Archives and Records Administration \(NARA\)](#) and the U.S. Department of the Interior (DOI) to develop a records management maturity model (RM3) that any organization could use to evolve its enterprise-wide records and information management program. It would be especially helpful to those organizations looking for guidance on how and where to start. A model drafted by the DOI in 2006 is the foundation for the RM3 project, which is expected to be ready for vote by the [Object Management Group \(OMG\)](#) by early 2009. The [Government Domain Task Force \(GovDTF\)](#) is facilitating the project, which will complement the larger-scale Business Process Management Maturity Model recently approved by the OMG.

## **ANNUAL AWARDS MEETING**

The annual awards night was held on May 13 at MTM International, Inc.'s headquarters in Verona. Following a very tasty Mexican dinner underwritten by MTM, Priscilla Jarona presented the following members with Certificates of Appreciation:

President	<b>Ana Aquino-Perez</b>
VP Programs	<b>Tim Hughes</b>
VP Membership	<b>Priscilla Jarona</b>
VP Seminar	<b>Lori Ashley</b>
Secretary	<b>Jodie Armstrong</b>
Treasurer	<b>Diane Vultaggio</b>
Past President	<b>Priscilla Jarona</b>
Finance Committee Chair	<b>Pam Duane</b>
Webmaster	<b>Tim Hughes</b>
Newsletter Editor	<b>Rosemary Stark</b>

## **GENERAL AWARDS**

### **President's Choice**

This award recognizes an individual who has contributed in a special way to the chapter. Over the past several years, this individual has quietly and steadily contributed to the advancement of RIM in the Madison community through her teaching, writing, and encouragement of graduate and undergraduate students in the UW-Madison School of Library and Information Studies (SLIS). She has invited area records and archives professionals to her classes to share their real-life experiences with the students. She is currently collaborating with area practitioners as part of the state's on-going RIM revitalization efforts. This year, she was responsible for encouraging a dozen members of her RM class to attend the chapter's spring seminar. We recognize her efforts raising records management awareness among her students and her peers. The recipient of this year's President's Choice Award is **Ciaran Trace**.

### **Rose**

The Rose Award is given to an individual who serves the chapter when called upon. For the past two years, this individual has helped coordinate publicity for the shredding event, organized and engaged the staff at Kard Recycling, and served as hostess to ARMA volunteers and members of the public participating in the event. It is with great pleasure that I present this year's Rose Award to **Vicki Harper**.

(Cont. on page 5)

## **AWARDS**

(Cont. from page 4)

### **Rookie of the Year**

The Rookie of the Year award recognizes someone who has recently become active in the chapter and made a significant contribution. This year's winner has been an active attendee at programs and seminar and always willing to get involved in discussions. This year they provided great input by volunteering to help organize the Vendor's Fair for the annual spring seminar. This year's Rookie of the Year award goes to **Cal Lanzel**.

### **Distinguished Service**

This person has been a cornerstone of ARMA Madison and Madison's records management community for many years. They have served as an officer and on various committees and hosted a monthly meeting. This person is very involved with the Madison business community and through these contacts helped spread the word about records management. They have provided support of various activities through financial support, participation and communications. This person has served as a role model and mentor for our members and their employees

I am pleased to present this year's Distinguished Service Award and extend our very best wishes to **Karl Wellensiek**.

### **Leadership & Service Award**

This year's Leadership and Service Award go to someone who exemplifies both of these qualities. For several years this individual chaired the Seminar Committee and through the results of these seminars, helped build our Chapter's financial resources. They are willing to help out whenever needed and never wait to be asked. For the past three years, this person has served as our Chapter President and led us through a full roster of professional programs, spring seminars and strategic planning. They helped kick off our Annual Shred Event. They've even got their daughter involved -- she helped out with this year's Shred Event and attended some monthly meetings.

The recipient of this year's Leadership and Service Award is our very own chapter President, **Ana Aquino-Perez**.

### **Chapter Member of the Year**

The Chapter Member of the Year is given to an individual who has contributed in a significant way to the chapter's mission and success. This person has a 'can do' attitude that won't quit and brings a consistently high level of energy and commitment to the chapter's operations. Whether performing as an officer, helping out on committees or participating at programs and seminars, this person always has a positive attitude and brings fun and excitement to the activity.

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## AWARDS

(Cont. from page 5)

I am honored to present this certificate to **Jodie Armstrong**. Jody will be recognized and receive her plaque this fall at the annual ARMA conference in Las Vegas.

In the past, ARMA Madison has given out some special awards that can vary from year to year. The following award was given to two members.

### Old Faithful (2)

Chapter meetings and the annual spring seminar wouldn't be the same if it weren't for the familiar faces of our RIM colleagues. This year we would like to recognize two such individuals who come out of the trenches of their daily RIM work to join us on a regular basis and make a contribution to our shared learning and networking. This year's Old Faithful awards go to **Jim Page** and **Steve Bose**. Jim and Steve represent the collegial spirit and professional commitment that make their work teams and the ARMA Madison chapter successful.

The following **Anniversaries** were recognized:

<b>10 Year</b>	Priscilla Jarona
<b>15 Year</b>	Steve Bose Tom Smith Terry Walsh
<b>20 Year</b>	Karl Wellensiek
<b>30 Year</b>	Tim Hughes

## GREAT QUOTES

“Can you tell me, please which way I ought to go from here,” asked Alice.

“That depends a good deal on where you want to get to,” said the cat.

## **FOCUS ON RESEARCH FROM THE ARMA INTERNATIONAL EDUCATIONAL FOUNDATION: *RIM Checklist for Mergers, Acquisitions, Divestitures, and Closures*, a Study by John T. Phillips, CRM, FAI**

Most RIM professionals who work for large corporations will need to deal with at least one merger, acquisition, or other large-scale change in status during their careers; many will be faced with this situation repeatedly. Too often, records considerations are not adequately addressed (if at all) during the planning or execution of these business transactions. Only afterwards, when an investigation, audit, or search inevitably brings to light this oversight will the records manager – and the attorneys – be left to deal with the mess.

The need for a standardized and proactive approach for managing the records issues associated with mergers, acquisitions, and divestitures was well known. As is too often true, however, many of us waited for an educational institution or consulting firm to publish something in the literature on this topic that we could use for an authoritative reference.

The ARMA International Educational Foundation (AIEF) recognized the need for this information, coordinated obtaining the resources to perform and fund the research, and took the necessary steps to get it done in 2005. John Phillips, a well-respected and frequent contributor on RIM topics offered to do the work and the Twin Cities chapter of ARMA International underwrote 50 percent of the project's costs. The remainder was funded by donations from individual donors.

The results provide an excellent discussion on the issues and challenges associated with these transactions, recommendations on how RIM professionals can (and should) be included in the planning, due diligence, analysis, and implementation phases, as well as the resources required to be successful. There are two detailed checklists included: one for the RIM program elements and one for the specific records affected. It is an invaluable RIM resource and a crucial element in the RIM toolbox.

The ARMA International Educational Foundation is a funding resource for research and scholarship in the field of records and information management. This is only one of many research projects on records management issues that have been addressed by the AIEF. All AIEF research is available for download free from its website.

One of the most important sources for AIEF funds is the donations received from ARMA chapters and chapter members. For more information, visit the foundation's Web site at <http://armaedfoundation.org/>

Pilar McAdam, CRM, Trustee and CFC Coordinator, ARMA International Educational Foundation

## **2008-2009 BOARD OF DIRECTORS**

By Priscilla Jarona  
Past President & VP of Membership

Thank you to all who took the time to vote. We had an excellent roster of candidates. Below is a list of the new Board of Directors who will be transitioning into their new positions in July.

President: Tim Hughes  
Past President: Ana Aquino-Perez  
VP Programs: Thom Dahlen  
VP Seminar: Cal Lanzel  
VP Finance: Diane Vultaggio  
VP Membership: Priscilla Jarona  
Secretary: Jodie Armstrong

On behalf of the Chapter, I would like to thank Ana for leading our Chapter as President for the past three years. She brought many good changes and had lots of great ideas for how to make our Chapter better for our members. She will be a great asset to Tim as she assists him during his term.

In addition, Rosemary Stark will remain our Newsletter Editor. Rosemary has served in this position for quite a few years and has done an excellent job of reporting to our members. Pam Duane will also remain as the Archivist/Librarian for the Chapter. Pam has also served in this roll for many years and is an excellent resource.

Please join me in congratulating your new Board and thanking the past Board members for their service to the Chapter.

We are always looking for individuals to assist with some of the committees. It is a wonderful experience where you get to know others and become a more active member of the Chapter. Please either volunteer by contacting the new VPs or say yes if called upon for assistance.

Have a great summer and we'll see you in September when our monthly program begins!



## **TIPS AND TRICKS TO UNCOVER THE MYSTERY OF SCANNING OPERATIONS**

The final program for the ARMA Madison chapter took place at MTM International Inc's Conversion Services and Records Storage Facility in Verona, Wisconsin. Scott Hagen, director of the Physical Records' Division, spoke about increasing efficiencies in records scanning. Scott has more than 10 years of experience in the enterprise content management (ECM) industry.

Document preparation is the most important part and drives the efficiency of the process. Removal of staples and clips and proper identification of the documents goes a long way in making the job less tedious.

1. Determine where the documents will be stored, such as Windows directory or CD/DVD. Once converted, how will the documents be used? Scott suggested using technology to your advantage-adjust pages and do cleanup tasks on the documents as you go.
2. Make the data entry efficient by using barcodes and forms recognition software.

How do you know everything scanned properly? Run a test. Establish a Quality Control process where you test a percentage of the documents. Inspect the first, middle, and last image in a batch. Create a test that meets your needs.

Determine the best way to maintain or distribute the information, CD/DVD, Flash Drive or a secure site with limited access. How does the company back up the information? Does the company want Personal Identification information and how does it get removed from the scan stations?

If information is also stored in paper format, several factors need to be looked at. What is the access activity level-how often and who needs the information. A scan-on-demand procedure could be implemented instead.

Scott gave the attendees lots to think about when considering conversion of paper records to electronic format.



## **President's Blog**

(Cont. from page 1)

We worked hard and accomplished many of the goals that we set forth this year and in previous years. We approved our revised bylaws, created a chapter leadership handbook that will serve as a legacy for future chapter leadership, and finalized our strategic plan and two-year operating plan for the chapter. We had a great program year with increased attendance. Our seminar was one of the best we have put together in a while. We continued to develop partnerships with other institutions like the University of Wisconsin-Madison and with member vendors. Our membership increased by 13.5% and several of our members continued to be involved in RIM activities beyond the chapter level. Our finances also increased after hitting an all time low. We improved the board of directors' nomination and voting process and ended up with two new members on the board.

The new program year will bring us new challenges and programs that we hope will continue to offer you opportunities and educational programs to meet your professional needs and the information management needs of your workplaces. Our new leadership is ready to move forward. They have already spent time this summer creating action plans and programs for the upcoming year. Please, continue to provide them the support you have shown to all of us in the past.

I am looking forward to seeing you all again in the fall. It has been my pleasure to serve you these last three years!!

Signing off,

Ana Aquino-Pérez



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.

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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.



Scott Hagen, MTM Physical Record division director, spoke about increasing efficiencies in records department.

## ANNUAL AWARDS



Ciaran Trace receives the **President's Award** from President Ana Aquino-Perez.



Jodi Armstrong receives the **Chapter Member of the Year Award**.



Jim Page and Steve Bose were recipients of the **Old Faithful** award.



Gillian Hill, Great Lakes Region Manager, visited the Madison Chapter of ARMA International.