



September 2010
Volume 42, Issue No. 1

2008-9 ARMA International
Newsletter of the Year Award Recipient



For the Record
Newsletter of the Oregon Chapter

ARMA INTERNATIONAL—The Information Management Professionals

Email Management Follow-up to the Launch of Email Quick Wins

By **Elly Bracamontes**
Global Records Administrator
NACCO Materials Handling Group, Inc.

Date: Tuesday – September 14, 2010

Time: 2:30 p.m.

Location:

NACCO Materials Handling Group, Inc.
4000 NE Blue Lake Road
Fairview, OR

(See Map on Page 2)

COST: \$10—Members
\$15—Non-Members

Program Description: Elly Bracamontes made a presentation at the March 2009 Chapter Meeting about her company's plans to launch Email Quick Wins - an internal program to help employees reduce email volume while strengthening its effectiveness. So, is it still overwhelming and out of control? Elly will tell us about the successes and challenges they experienced as they trained thousands of employees at 19 different sites in 10 different countries and the lessons learned.

Speaker Bio: Isabel "Elly" Bracamontes is the Global Records Administrator for NACCO Materials Handling Group, Inc.

Continued on next page

Oregon ARMA
P. O. Box 40004
Portland, OR 97240-0004

www.oregonarma.org

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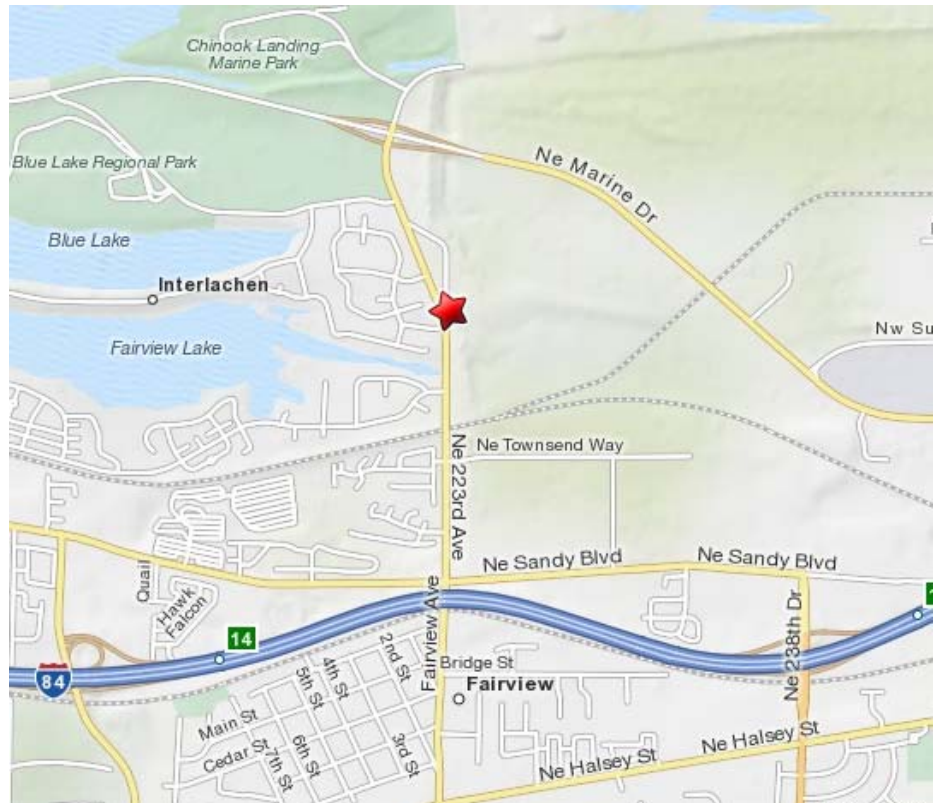
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(NMHG). NMHG specializes in the design, engineering, manufacture, and global sales of lift trucks and component parts. NMHG is one of three principle businesses under NACCO Industries, Inc, a publicly traded company.

MAP to 4000 NE Blue Lake Road, Fairview, OR

Driving directions from Portland
(NACCO Materials Handling Group - Counterbalanced Development Center)
4000 NE Blue Lake Road, Fairview, OR 97024

- Follow I-84 East to the Fairview Parkway exit.
- Take the FAIRVIEW PARKWAY exit—EXIT 14
- Turn LEFT onto NE FAIRVIEW PARKWAY
- Turn RIGHT onto NE SANDY BLVD/US 30 BY/NE PORTLAND HWY
- Turn LEFT onto NE 223rd (signal)
- Turn SLIGHT RIGHT onto NE BLUE LAKE ROAD
- 4000 NE BLUE LAKE ROAD is on the RIGHT.



Chapter Mission Statement

Provide Records and Information Management education and opportunities, and promote professional development within ARMA and the business community.

From the Square Office

by Cheryl Dorman

It's a new year for the Oregon Chapter, and we have some exciting things planned for you. If you weren't around in May, let me introduce you to one of our new Board members, VP of Programs Bruce Schinkelwitz. Bruce holds a Master of Archival Studies from the University of British Columbia and is a Certified Records Manager (CRM). Since 2007, he has worked as an independent consultant to clients worldwide, providing RIM and ECM product implementation consulting services. Many of you know Bruce, as he has done presentations for us in the past. If you have a thought or an idea about what you'd like to see for this year's program, contact Bruce and let him know. You can find his contact information on the website.



There are a few things we'd like to accomplish this year, so if you're interested in helping out, let me know. Here are some of the things in the works:

Rose Festival Records – How Can WE Make a Difference?
 Marching in the Rose Festival Parade
 Virtual Chapter Meeting (possibly including the whole GNW Region)
 Great Northwest Leadership Conference

Last year, our chapter finished strong and actually made a profit. We will be reviewing the 2010/2011 budget at our September meeting, so if you'd like a say in how we spend our money, be sure to be there.

Our September meeting will be held at the offices of Elly Bracamontes, who is our presenter doing a recap on the E-Mail Quick Wins. Incidentally, Elly is our Chapter Member of the Year for 2009/2010. We will be presenting her with a certificate at the meeting, so you don't want to miss it.

The board is continually working behind the scenes to make this year better than ever. Let's all work together to make this the best year yet!

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MEMBERS ONLY

Your exclusive pass to RIM resources and membership benefits

Kimberlee Akimoto, Director of Membership



Welcome to another great Oregon ARMA chapter year! If you are reading this column, and are currently *not* a member of Oregon ARMA, here are some reasons why you should join:

Educational opportunities! The Board is busy planning a fabulous line-up of programs for all of you. Once again, our programs will be aligned with ARMA International's Core Competencies. Increase your knowledge and skills by attending our educational programs!

Networking opportunities! Are you new to the profession? Have you been given a records "project" and have no idea where to start? Chances are you'll be able to find a wealth of knowledge and a plethora of ideas just by talking to your colleagues.

Please contact me if you have any questions about becoming a member of the Oregon Chapter of ARMA International.

Membership update:

Welcome Amanda Belle Wright, Charles Barnum, Kim Meadows, Kimberly Wollenburg, and Linda Richardson our newest members!

The following Oregon ARMA members celebrated their milestone anniversaries this summer:

Dee Wise	15 years	Mary Beth Herkert	10 years
Bruce Schinkelwitz	10 years	Karen Arms	5 years

Other anniversaries this summer:

Sue Nelson	32 years	Jeffrie Riha	26 years
Dwight Wallis	21 years	Kristi Kieffer	18 years
Pamela Willis	16 years	Karole Kellam	14 years
Nathan Bartholomew	14 years	Rebecca Shoemaker	13 years
Don Wise	13 years	Cindy Berry	12 years
Matthew Fletcher	6 years	Eva Giddings	4 years
Charles Killian	4 years	Franklin Milton	3 years
Tyrene Bada	3 years	Brian Campbell	3 years
Cathy Wheatley	2 years	Geoff Gaydos	1 year
MJ Grimes	1 year		

Newsletter Editor—Jane McGarvin

Cheryl Dorman, Chapter President

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Printed in the U.S.A.

Check It Out

September 2010

Karen Green, CRM
Director of Education



Available from the Oregon ARMA Chapter Library:



The Digital Records Conversion Process: Program Planning, Requirements, Procedures

ANSI/ARMA 16-2007

Author: ARMA International

Copyright: 2007

Description

This American National Standard provides requirements for ensuring that electronic records remain authentic and trustworthy as they are converted from one digital recordkeeping system to another. Though it does not address digital preservation, there is a substantial link between conversion and digital preservation, as many preservation strategies involve some type of conversion process.

Part I of the standard addresses the decisions relating to program planning and recordkeeping issues. Part II discusses the actual conversion process.

Appended are tables, a template that draws together recordkeeping requirements, the risks/drivers impinging on the conversion process, the controls, the stages of the conversion process, and tools designed to aid records professionals and others assigned the conversion task.

Other ANSI/ARMA Standards available through Oregon ARMA Chapter Library:

Establishing Alphabetic, Numeric and Subject Filing Systems ANSI/ARMA12-2005

Procedures and Issues for Managing Electronic Messages as Records ANSI/ARMA TR-02-2007

Retention Management for Records and Information ANSI/ARMA 8-2005

Vital Records Programs: Identifying, Managing and Recovering Business-Critical Records
ANSI/ARMA 5-2003

The Oregon ARMA Chapter Lending Library inventory may be accessed through:

<http://www.oregonarma.org/library.php>



The premier event in the records and information management field, ARMA International's 55th Conference & Expo, will be held November 7-10, 2010, at the Moscone Center West in San Francisco, Calif. It's never too early to start planning for the 2010 ARMA International Conference & Expo, which delivers the resources and tools you need to better govern your information.

Real Solutions—If you want solutions to the challenges the records and information management profession faces today, such as developing automated accurate retention schedules or establishing a metadata framework, this conference is a must. The education and face-to-face networking opportunities offered by the conference are stellar. You'll find all the tools you need — including leading-edge education from the top thought leaders in their fields, as well as the best practices, tactics, and technologies —for governing records and information seamlessly throughout your organization.

ARMA Expo—See the industry's emerging technologies as the ARMA EXPO hosts over 200 exhibitors serving the records and information management community. This is a one-time chance to visit with companies offering solutions for electronic content management (ECM), e-records solutions, e-mail management, compliance, and archiving solutions. The exposition is open November 7-8 and free to all attendees.

The advertisement features a background image of a man and a woman in business attire looking at a laptop. The man is on the left, wearing glasses, and the woman is on the right. The text "LESS MORE" is positioned above the words "PAPER WORK", which are written in large, bold, white letters. The entire scene is overlaid with a green tint.

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Advertising Rates

Effective September 1, 2008, the advertising rates for 9 issues are as follows:

Full Page \$315

Half Page..... \$255

Quarter Page..... \$215

Third Page..... \$230

One Month Ad, Any
Size..... \$55

All copy must be submitted in either .tif or .pdf format by the 10th of the month to Newsletter Director Jane McGarvin.
Phone: 503-635-0236
Fax: 503-697-6594
Email: jmcgarvin@ci.oswego.or.us



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May Chapter News Cheryl Dorman, President

The last meeting of the 2009-2010 Chapter Year was held May 11 at Iron Mountain for a wonderful lunch catered by Elephants Deli. A big Thank You to Iron Mountain for hosting this meeting and providing lunch. It was YUMMY!

Thank you to 2009-2010 Board Members present at the meeting:

John Littler, VP Programs
Cathy Wheatley, VP Facilities
Debbie Baidenmann, Secretary
Dwight Wallis, Treasurer
Karen Green, Education Director
Kimberlee Akimoto, Membership Director
Tyrene Bada, Webmaster
Tim Hunt, Immediate Past President

Officer installation for the 2010-2011 Chapter year

VP Programs, Bruce Schinkelwitz
Treasurer, Dwight Wallis
Secretary, Debbie Baidenmann
Membership Director, Kimberlee Akimoto
Education Director, Karen Green
Webmaster, Tyrene Bada

Award Presentation for Chapter Member of the Year

Elly Bracamontes

Award Presentation for Chapter Leader of the Year

Tyrene Bada

Update on our chapter goals for 2010-2011

Rose Festival 2011 – how can we get involved?

Chapter of the Year, Newsletter of the Year, Website of the Year

Increased chapter participation at monthly meetings

Discussions / Feedback time for monthly chapter meetings

Most of the discussion centered around tours of different archive/record centers. Member mentioned that afternoon meetings will work best as they save money, for both members and the chapter in general.

Members presented some great ideas of what they'd like to see for next year.

Tim Hunt invited the members to the Grand re-opening of the City of Portland Archives and Records Center that was held May 18.

Thank you everyone for a great year. Looking forward to another year!



Wonderful lunch enjoyed by members



Officer Installation



Presentation of Chapter Leader of the Year to Tyrene Bada



Message from the Great Northwest Region

Cindy Fredrickson, Great Northwest Region Treasurer Oregon ARMA member Retires

Cindy is retiring from the Bureau of Land Management at the end of August!. She has worked for the BLM for 28 years, with 18 years in Portland as the BLM Oregon State Records Manager until 2008, before moving to Coos Bay to oversee the Region's office operations.



GNW Region Manager Marc Simpson and Cindy Fredrickson, GNW Region Treasurer at Oregon ARMA's 40th Anniversary Party in 2009

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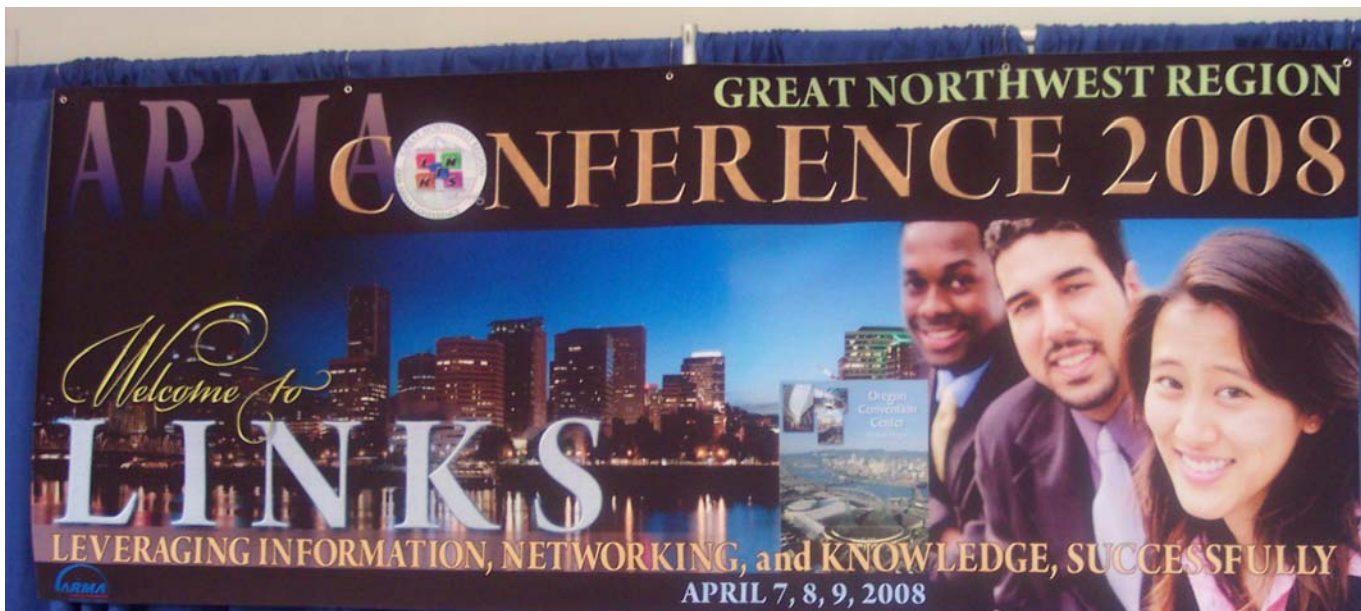
GO PAPERLESS. GO DIGITAL!

She served on the OREGON ARMA Board as Secretary and Treasurer until moving to Coos Bay, and served as Treasurer of the Great Northwest Region for the past two years.

Cindy has been diagnosed with ALS, known as Lou Gehrig's Disease. As it was getting harder to get around, she will take a medical disability retirement, and will be moving to live with her parents in Eugene early in September.

ALS is a disease associated with the Muscular Dystrophy Association (MDA) which has its annual fund raiser over Labor Day Weekend.

Cindy was responsible for the wonderful graphic signs at the Great Northwest Region Conference held in Portland in April 2008.



Regarding Cindy, Past Oregon ARMA President Jennifer Fouhy said: Cindy was a joy to work with during my years as President and on the board in other positions. She is very knowledgeable about records management, loved helping newcomers with any and all questions, always had a smile on her face and was ready and willing to help wherever she could. She has been a great asset to ARMA over the years. I wish her the best!

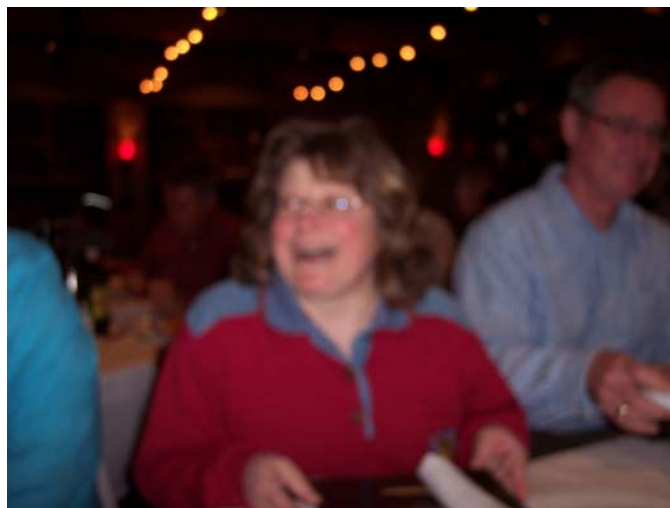
GNW Region Manager Marc Simpson wrote: I have already mentioned Cindy's success and how much we will miss her as Treasurer of the Great Northwest Region. What I don't think I can put into words is how much we will miss Cindy on the Region Team. But I think if you look at the pictures, her smile says it all. Her smile, her laugh, her integrity, her ability to hold her head high in the most trying of situations all speak to her character. She started as our Treasurer but she became our friend. Her role in ARMA has come to an end, but our friendship goes on. Thanks Cindy!

Continued on next page

Oregon ARMA Immediate Past President Tim Hunt commented: I spent several years working on the Oregon ARMA Board with Cindy, during which time I came to learn what a gracious, giving, hardworking and altogether sweet person she is. ARMA runs on volunteers and if the dictionary defined what a great volunteer is (and included a photograph), it would include a picture of Cindy's smiling face, and sunny disposition. On a personal note, my father was afflicted with ALS, so I am familiar with its effects. If anyone has the courage and strength of spirit to fight the disease, it is Cindy. Thanks, Cindy, for everything you have done for ARMA in the Northwest. Please know that your good thoughts will always be with you!!

Cindy's address as of September 4 will be
 767 Calvin Street
 Eugene, OR 97401

Our thoughts and prayers are with you, Cindy.



**Your
 Smile
 Lights
 Up
 Our
 Lives!**



“Ask the CRM”

Bob Dalton, CRM

QUESTION: I’VE HEARD OF THE EXPRESSION “RECORDS POLICEMEN”. IS THAT WHAT THE RECORDS PEOPLE DO? - Asked by a student and a thread on the records management listserv.

Response:

Unfortunately, many employees within an organization look upon the records manager as “records cops” who destroy records belonging to departments within the organization. I would like to think this is a misconception but experience has shown that it unfortunately is true in many cases. I personally recall clients who did not trust the records group because they destroyed their records without the permission of the department. I’ve actually known departments who rented and stored their inactive records in local storage lockers rather than have the records managed by the records management staff.

Personally, I am not a big fan of records management assuming the role of ownership of company records. Sometimes the records management listserv has a thread on this subject and I notice that there are people on the listserv who believe they are both custodian and owner of the company records. While I take great pride in assuming the management of the business records, I find it difficult to assume that because the records may be in our custody we have the authority to actually destroy the records even if the records retention period has passed.

I prefer to think that the records and information manager is responsible for maintaining the reliability of the records within the organization by establishing, implementing and maintaining the records management program that involves the creation, distribution, maintenance, protection, control, storage and destruction of the records. I seem to remember this from our records management books discussing the “Life Cycle of a Record”?

I firmly believe the responsibility for approving the destruction of records within the organization should be the responsibility of the client as they may have knowledge of records that could be a destruction exception that is unknown to the records manager. Destruction of records by a records manager that were an exception could undermine the goodwill of the client and place the reliability of the program in question

How many of you have the approval authority to destroy records? If you have the authority, do you destroy the records of your directors, CEO, CFO, etc., without getting prior approval. My guess you would ask permission or be looking for a new position if you destroyed something without their approval.

Some organizations may have other functions (legal, Accounting, etc.,) in their destruction approval process. For some reason having other functions within the company reviewing the destruction notices seems cumbersome, especially if the organization is very large and with units at different locations. The department should be made aware by other functions if there is a legal hold, tax hold, etc., as part of their normal business processes.

Continued on next page

I am a firm believer that a destruction notice be created, if at all possible, by departmental records coordinators, reviewed and sent to and signed by the department owner of the records. The destruction notice or letter accompanying the destruction notice should also ask if there is a reason (legal, financial or administrative) why the records should not be destroyed. Perhaps a hold has been placed on the records by litigation. Maybe the tax audit has not cleared. These reasons would be sufficient to place a hold on the records until the matter is closed. A suspense system should be in place to insure timely follow-up to review holds/tax audit records being held beyond their retention period. Records that are to be retained beyond the retention period for administrative reasons should be reviewed annually to determine if the established retention period is insufficient to meet the needs of the organization.

In closing, I am a firm believer that records management function should not assume the role of the "records policeman" and the responsibility for destruction approval rests with the department owner.

Bob Dalton, CRM of Dalton Consulting

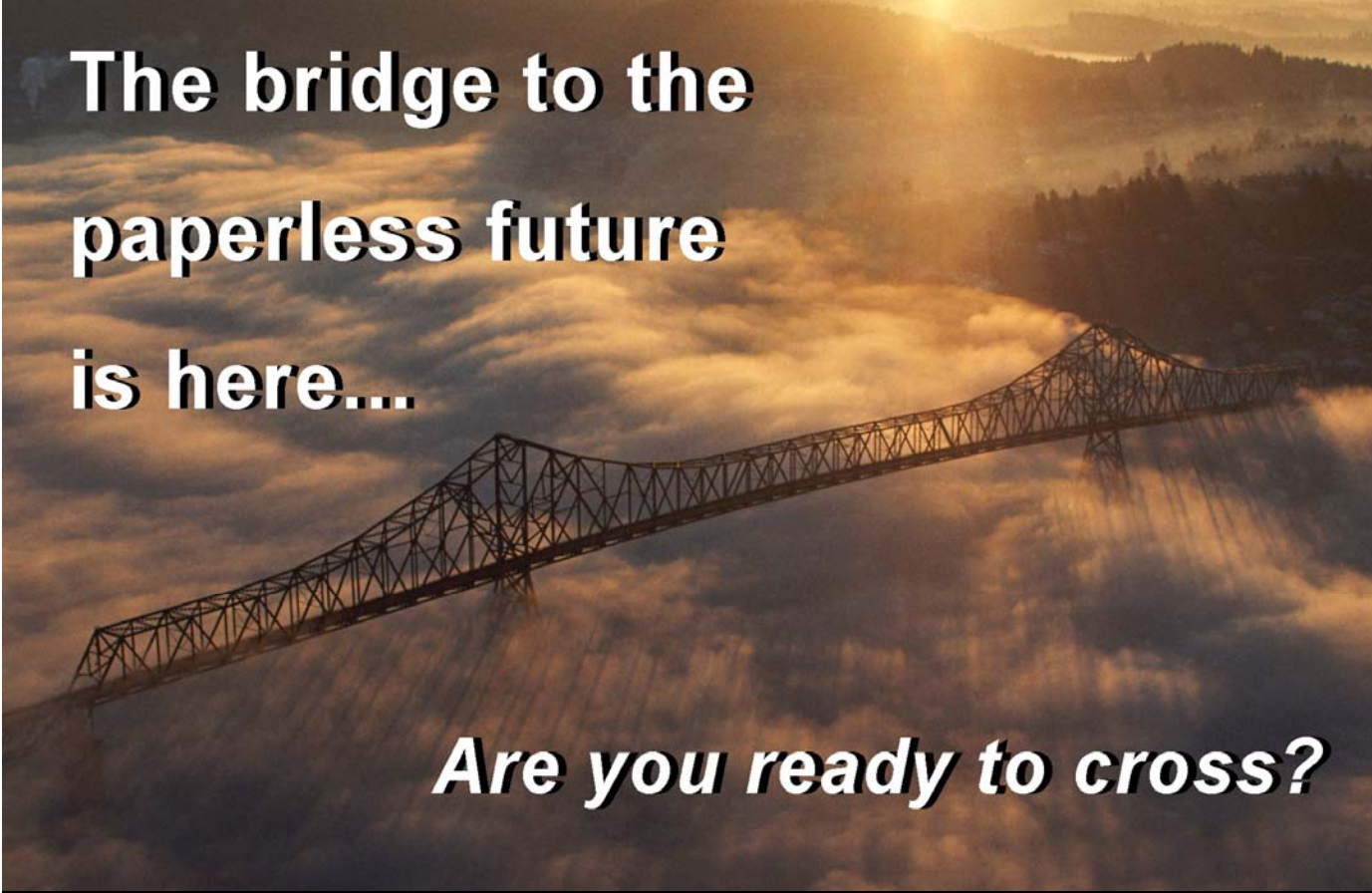
Note: My thanks to Barbara Werelius, Records Manager and Guru at Tacoma Public Utilities, and the Puget Sound Chapter of ARMA for her assistance in the development of this article.

Other articles by Mr. Dalton can be reviewed and copied at his BLOG site: ask-thecrm.blogspot.com.

TENTATIVE CALENDAR OF OREGON ARMA EVENTS

MONTH	Board Meeting	Chapter Meeting
September	September 13	September 14
October	October 11	October 12
November	November 15	November 16 (week later because of ARMA International Conference)
December	December 13	December 14
January	January 10	January 11
February	February 7	February 8
March	March 7	March 8
April	April 11	April 12
May	May 9	May 10

Dates are tentative and subject to change



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OREGON CHAPTER OF ARMA INTERNATIONAL

Meeting/Seminar Registration Form

**Email Management—Follow up to Launch of Email Quick Wins
Elly Bracamontes**

Tuesday, September 14, 2010—2:30 p.m.

LOCATION: NACCO Materials Handling Group, 650 NE Holladay Street, Portland

**Pay either by check (make checks payable to OREGON ARMA) or
PayPal (via the Oregon ARMA website)**

Or click on <http://www.oregonarma.org/meeting.php?ID=124>

Cost: \$10 for members; \$15 for non-members

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FAX: 503-274-2908—Attention: Cheryl Dorman

Email: crd@inicigroup.com

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Portland, OR 97240

Name: _____

Phone: _____

Company Name: _____

Name(s) of Guests(s) _____

REGISTRATION DEADLINE:

Reservations required by September 10

Oregon ARMA
P. O. Box 40004
Portland, OR 97240-0004

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OREGON ARMA OFFICERS

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Director / Membership	Kim Akimoto	TriMet 4012 SE 17th Avenue Portland, OR 97202	503-962-6489 (O) 503-962-3095 (F)	kimberlee.akimoto@gmail.com
Immediate Past President	Timothy Hunt, CRM	City of Portland 1221 SW 4th Avenue, Room 140 Portland, OR 97204-1987	503-823-4565 (O) 503-823-4571 (F)	tim.hunt@portlandoregon.gov
2010-11 Great Northwest Region				
Region Manager	Marc Simpson	Pierce County Public Works	253-798-3563	msimpso@co.pierce.wa.us
Region Coordinator	Jennifer Winkler	City of Seattle	206-684-8154	jennifer.winkler@seattle.gov
Region Treasurer	Timothy Hunt, CRM	City of Portland	503-823-4565 (O)	tim.hunt@portlandoregon.gov