



October 2010
Volume 42, Issue No. 2

2008-9 ARMA International
Newsletter of the Year Award Recipient



For the Record
Newsletter of the Oregon Chapter

ARMA INTERNATIONAL—The Information Management Professionals

PRESENTATION AND TOUR OF THE OREGON STATE ARCHIVES

By Mary Beth Herkert, CRM
Oregon State Archivist

Date: Tuesday – October 12, 2010

Time: 12:00–2:00 p.m.

(PORTLAND MEMBERS: Contact Cheryl Dorman by October 8 to coordinate carpooling plans) Please plan to arrive by 11:45 a.m.—Bring Brown Bag Lunch

Location:

Oregon State Archives
800 Summer Street NE
Salem, OR

(See Map on Page 2)

COST: \$10—Members; \$15—Non-Members

Enter the world of the Oregon State Archives. October's meeting will be a presentation by Mary Beth Herkert of the State Archives. Her presentation will touch on the many aspects of archiving records, including retention of records generated in Social Media.

(continued on page 3)

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

www.oregonarma.org

Inside This Issue

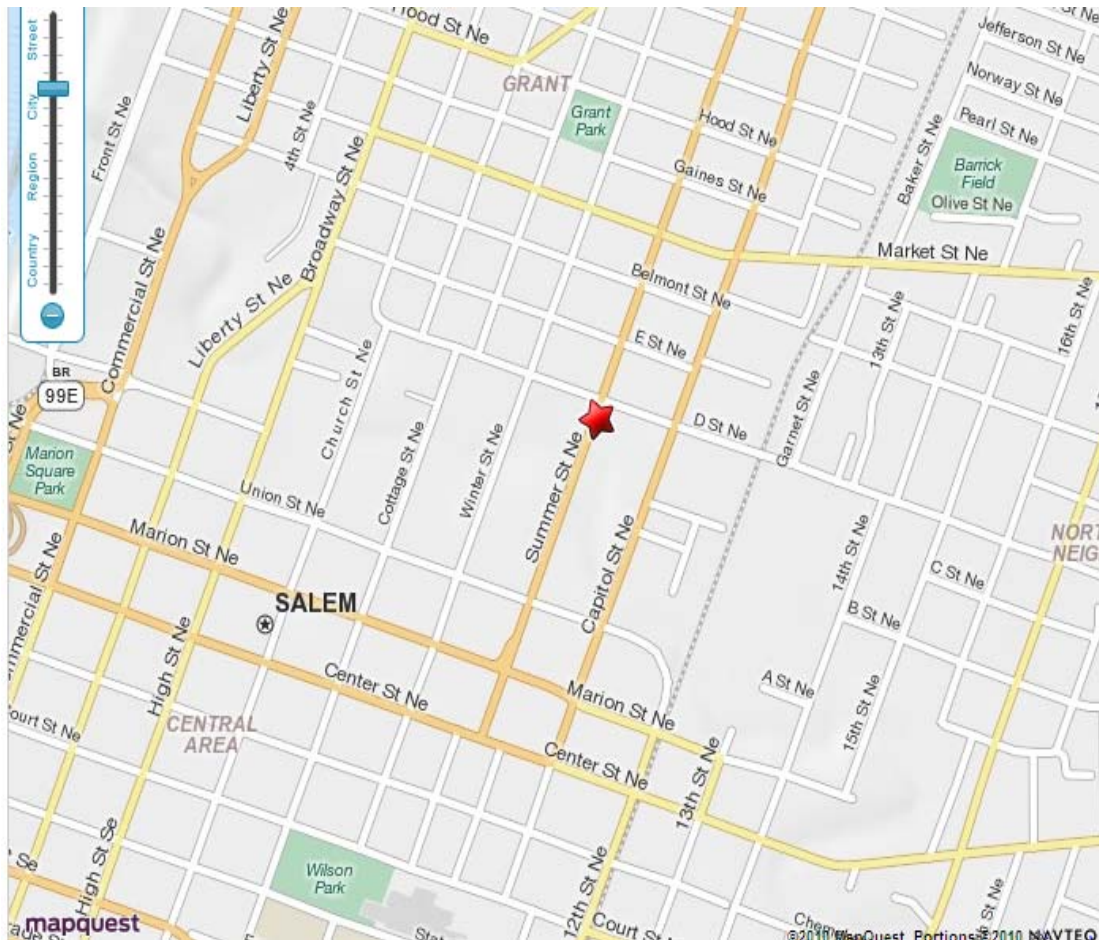
Program—Oregon State Archives Presentation and Tour	1
From the Square Office—Cheryl Dorman, Chapter President	4
Chapter Leader and Member of the Year—Cheryl Dorman	4
Members Only—Kimberlee Akimoto, Membership Director	5
Check it Out—Karen Green, Education Director	6
Advertising Rates	6
September Meeting & Email Quick Wins—Meeting Recap—Cheryl Dorman	7
Oregon Archives Crawl - Tim Hunt	9
GNW Region Update— Marc Simpson, Region Manager	10
Ask the CRM—Bob Dalton, CRM	12
Chapter Meeting Schedule	13
Registration	15
Officer Page	16



Come with your pens and paper to create your own “archive” notes and wear your walking shoes, as she will be giving us a tour of the archives after the presentation.

The Archives is located in the Cecil L. Edwards Archives Building at 800 Summer Street NE in Salem. The public entrance to the Archives Building is located on the Summer Street side of the building. Metered parking is available in the parking lot located off Summer Street. Free one hour parking is available on D Street and in the neighborhood to the north of the building. See: <http://arcweb.sos.state.or.us/tour/lobbymax.html>.

MAP to 800 Summer Street NE, Salem
From I-5, take Market Street NE, to Summer St., NE.



Chapter Mission Statement

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

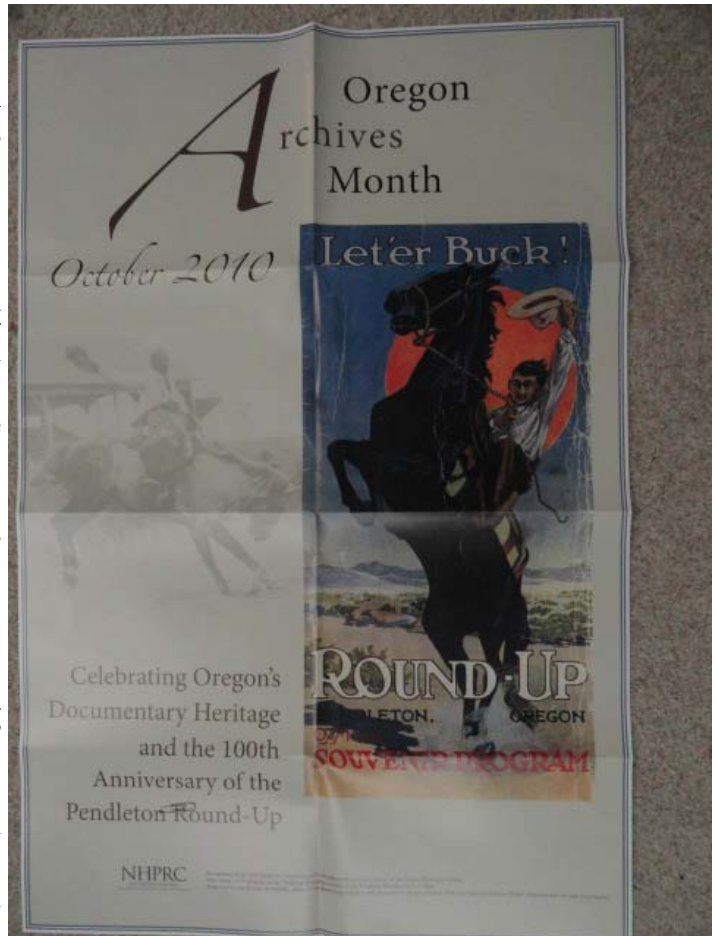
Program Description:

October's featured speaker is Mary Beth Herkert, Oregon's State Archivist. A tour of the Oregon State Archives and its many historical holdings will follow the presentation.

About our speaker: Mary Beth Herkert, CRM. Secretary of State Bill Bradbury appointed Ms. Herkert as Oregon's State Archivist in 2005. Ms. Herkert holds a Masters degree in history from the State University of New York, Albany and is a Certified Records Manager. She is active in numerous professional organizations, and serves on the board of the National Association of Government Records Administrators (NAGARA).

About the Oregon State Archives: The history of the Oregon State Archives highlights the importance of disaster planning and of protecting valuable records. Before the Oregon State Archives was established, there was no unified approach for preserving historical state records in Oregon. Records that documented state government in the late 19th and early 20th centuries had disappeared over the years; the fire that destroyed the State Capitol in 1935 also destroyed many valuable records. Concern for the safety of historical records during WWII, and the realization that many valuable records were in danger of destruction because of neglect, led the state to establish the Oregon State Archives in 1947.

Today, the Oregon State Archives houses and provides access to the permanently valuable records of Oregon government. It also authorizes disposition of the public records of Oregon government, provides records management advice and assistance to state agencies and political subdivisions and operates the State Records Center which provides inexpensive storage for inactive state agency records. In addition, the Oregon State Archives files, codifies and publishes state agency administrative rules and publishes the Oregon Blue Book. The Oregon State Archives also coordinates the work of the State Historical Records Advisory Board.



Oregon Archives month poster

From the Square Office

by Cheryl Dorman

Archive seems to be the word of the day, or even the month. Throughout our lives, we “archive” many things. Most of us have the standard contracts and paperwork that we dutifully file away. On a more personal side, we also archive things like pictures, special trinkets and maybe an old birthday card or two. Archiving preserves our history. It tells a story of who we are and where we came from. It’s our legacy.



Without archives, how would we know who our ancestors are, or who was the 26th President of the United States (that’s Theodore Roosevelt by the way). Businesses need to archive records for many different reasons. Archiving is an important step for businesses to retain their history; however, not all records are archived for the same amount of time. Some records need only be kept for a few years. Others should be saved and preserved forever.

To some of us, archiving may be a mystery. If you want to hear from a leading expert and obtain valuable information about archiving, come join us at the Oregon State Archives for a presentation and a tour.

Chapter Member and Leader of the Year Awards

Chapter Member of the Year—Every year the Oregon Chapter selects a Chapter Member of the Year. The Selection Committee for this award is made up of the current Member of the Year, one Board member and one Chapter member. The Committee looks for a person who has contributed the most to the chapter that year in the way of commitment, attendance, and who best supported and promoted ARMA International objectives. This last year, Elly Bracamontes was chosen. Elly has been working with her company to create and promote Email QuickWins, an email management system. This has taken much of her time, but yet she still found time to attend our chapter meetings and be involved. She has also done presentations for us at previous chapter meetings.



Chapter Member of the Year
Elly Bracamontes

Chapter Leader of the Year—This is a new award for ARMA International and the recipient is one who is an outstanding leader in the chapter. Our first recipient is Tyrene Bada because of her dedication and hard work the last year in keeping up with our website demands. Tyrene also took on the task of creating a new look for the Oregon ARMA website. She has been a member of the Oregon Chapter since June 2007 and immediately stepped in to help on the board, renewing her current role as Webmaster. Working with a budget of nearly \$0, Tyrene has made it a point to attend the ARMA International Annual Conference every year, spending her own money to get there and be a part of the conference.



Chapter Leader of the Year
Tyrene Bada

As a recipient of these awards, the Oregon Chapter of ARMA is proud to pay for a full registration to the ARMA International Annual Conference in San Francisco this year for both Elly and Tyrene. Congratulations and thanks for being such great role models.

Do you have someone in mind you think is worthy of these awards? If so, we’d like to hear it. Remember, it’s your chapter. We want to acknowledge all of those who deserve to be recognized for their contributions to ARMA and the Records Management community.

Check It Out

October 2010

Karen Green, CRM
Director of Education



Available from the Oregon ARMA Chapter Library:



Guideline for Evaluating Offsite Records Storage Facilities

Author: ARMA International

Copyright: 2007

Description: This guideline is a practical tool to evaluate your organization’s storage needs, determine whether their business practices make outsourcing the best decision, and assess the ability of vendors to meet storage requirements. It includes checklists for records security and protection, service levels, contract terms, and cost comparisons. This guideline will assist in the development of:

- A customer profile
- A request for information (RFI) process
- A request for quote (RFQ) process

The Oregon ARMA Chapter Lending Library inventory may be accessed through:
<http://www.oregonarma.org/library.php>

Advertising Rates

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

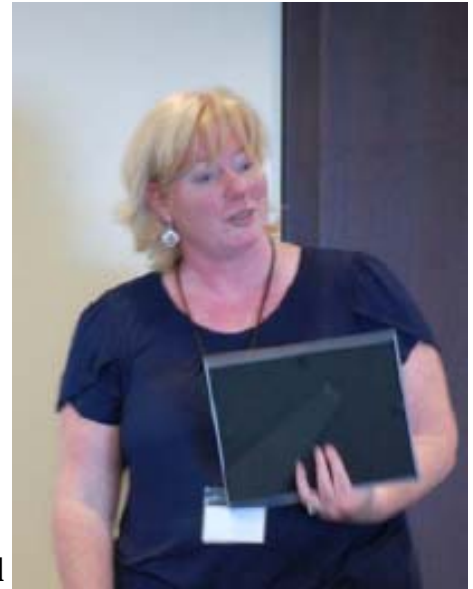
Full Page.....	\$315	Half Page	\$255
Quarter Page.....	\$215	Third Page	\$230
One Month Ad, Any Size..... \$55			

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

September Meeting and Email QuickWins Recap

by Cheryl Dorman

Our September meeting was small but very successful. We had some new members there, one coming from Eugene. Thank you to all of those who participated. Elly Bracamontes was formally presented with the Chapter Member of the Year Award, and she immediately stepped into her role as presenter and gave an outstanding presentation on Email QuickWins, an email management system created and implemented at NACCO Materials Handling. Unfortunately, the presentation and the materials are propriety to NACCO, so we are not able to put it on our website. In case you missed the meeting, here are a few highlights.



Elly and her team initially set out to add tangible business value. They interviewed employees and got their input on what kind of system they would use. Working with a cross-functional Change Management and Communication Team, they launched the campaign, set up a pilot program launch with one of the internal groups at NACCO and provided training for those using the new system.

Communication was fun and easy to understand. A video presentation was put together to show at the training sessions. This video was produced in house using NACCO employees and presentation materials. Since NACCO is international, this video was re-produced in other countries using their own language. Keeping this in-house kept down the costs of implementation at a time of lay-offs and budget cuts. The use of cartoons and an ongoing story kept people interested. Strategically placed advertisements kept their attention.

Email QuickWins worked because it had the full support of the employees and top-level management. There was employee interest and involvement. Training was designed around the employees and is now mandatory for all new hires.

The next step for Email QuickWins is to continue with the habit-building phase, moving from habit to sustainment.



Fortunately, you can trust one company to protect it.

Information. Created and shared in astonishing quantities and formats. Fortunately, you can partner with Iron Mountain to customize a Compliant Records Management program that meets these complex information challenges. We're the trusted partner of over 90,000 companies around the world, and we'd like to talk with you. Please call 800-899-IRON, or visit www.ironmountain.com/crm.



Records Management | Data Protection and Disaster Recovery Services | Secure Shredding | Digital Archiving
 Electronic Discovery Support Services | Health Information Services | Document Management Solutions

© 2007 Iron Mountain Incorporated. All rights reserved. Iron Mountain and the design of the mountain are registered trademarks of Iron Mountain Incorporated.

**Oregon Archives Crawl – October 2
Tim Hunt, CRM**

You’ve heard of Pub Crawls, but have you ever heard of an Archives Crawl?

Everyone is invited to join the first annual Oregon Archives Crawl this October in celebration of Oregon Archives Month. Walk, bike, run, or crawl between four different downtown locations and learn what local archives have to offer researchers, students, genealogists, scholars, homeowners, history buffs, and the curious of any age. We have something for everyone, old and young, native Oregonian and visitor passing through, professional and novice.

Travel at your leisure between the Portland Archives and Records Center, the Portland State University Library, Multnomah County Central Library and the Oregon Historical Society. At each place you can tour the facilities and participate in activities that bring history to life. The Oregon Historical Society and the Multnomah County Central Library will also be hosting displays by other area archives including the Oregon Jewish Museum, Willamette University, Oregon State Archives, Lewis & Clark College, the Oregon State University, the Mazama’s and the Washington County Museum. Each location and participating organization will have family friendly activities throughout the day.

A free Archives Crawl “passport” will be issued to help you navigate the crawl. A fully stamped passport enters you in a raffle drawing at our After Party at the Oregon Historical Society, where there will be light refreshments, live music and a whole lot of fun.

Join us for the first annual Oregon Archives Crawl and become a part of history!

**First Annual Oregon Archives Crawl
Saturday, October 2 — 11:00 AM to 4:00 PM
Free and Open to the Public**

Starting at any of the following locations: Portland Archives & Records Center, Portland State University Library, Multnomah County Central Library or the Oregon Historical Society.

**The After Party hosted by the Oregon Historical Society
Saturday, October 2 — 4:00 PM to 6:00 PM
Free and Open to the Public**

**Enjoy fun, music, and raffle prizes!
An Oregon Days of Culture event**

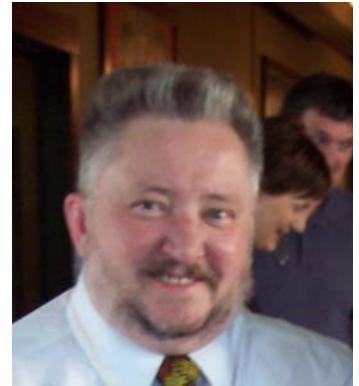
For more information, including a complete list of participating organizations: <http://pdxarchivists.wordpress.com/>.

<p>City of Portland Records Center 5thFloor of the new Portland State University Academic & Student Recreation Center (ASRC) at 1800 SW 6th Ave. Suite 550.</p>	<p>Portland State University Branford P. Millar Library's Portland State University Library 1875 SW Park Avenue Portland, OR</p>	<p>Oregon Historical Society 1200 SW Park Avenue Portland, OR Located between Madison and Jefferson Streets.</p>	<p>Multnomah County Central Library 801 SW 10th Street Portland, OR Located between Taylor and Yamhill Streets</p>
---	--	--	--



Message from the Great Northwest Region

Ask any program chair or anyone who has chosen speakers for a seminar or conference. Trying to find a balance of topics that appeal to members of varying levels of expertise is quite a challenge. Next, factor in our ailing economy. Fewer members are receiving financial support from their employers. For many chapters, attendance at meetings and seminars has been down. The result is less revenue for the chapters to provide programs and seminars. And while the revenues from such events have been down, the cost to put them on has risen. Now add this wrinkle. The Baby Boomer generation is retiring and more and more Generation X and Y people are members and assuming leadership roles in our organization. We Boomers love our monthly meetings. We love the face to face interaction. It is how we networked for years. But the Gen X and Y people grew up in an electronic



(continued on next page)

LESS MORE
PAPER WORK

Contact us today so we can
help with your paperLESS needs!

14780 S.W. Osprey Dr. Ste 240
Beaverton, OR 97007
503-641-0800 ~ 800-444-8688

INTEGRA
PAPERLESS BUSINESS SOLUTIONS

www.IntegraECM.com

GO PAPERLESS. GO DIGITAL!

world. They want things fast, quick, and on demand. Many would opt for a webinar versus a seminar. And their preferred networking is on Facebook versus face to face. Boomers meet, they tweet. There's nothing wrong with either. We're just a bit different. So how do we, the chapter and region leaders, blend those things together to provide quality education to all of you? And when I say all of you, I mean *all* of you. We have a number of members in our region who don't attend monthly meetings because they live too far away to do so. It wasn't until I visited the Greater Anchorage Chapter last May that I realized that their members in Fairbanks are an 8-hour drive away. The members in Juneau can't even drive to Anchorage. The only way to travel between the two cities is by boat or by air. And similar situations are repeated in all four states. How do we provide educational opportunities to all of you? This is the very question that we tackled last June when the chapter and region leadership met for our annual GNW Leadership Conference. I am very pleased to tell you that from our discussion, we formed a task force. Their goal is to put on an educational program that will be sent out to as many of the members of the region at the same time as possible. Just imagine our eight or so members in Fairbanks getting together and ordering pizza, the folks in Seattle brown bagging it and our friends in Boise sitting down to a buffet, while we all watch the same program. It is an ambitious undertaking. But it's one that once successful, could open new avenues to bringing fresh programs and speakers to our members, wherever they are! I am very excited about that.



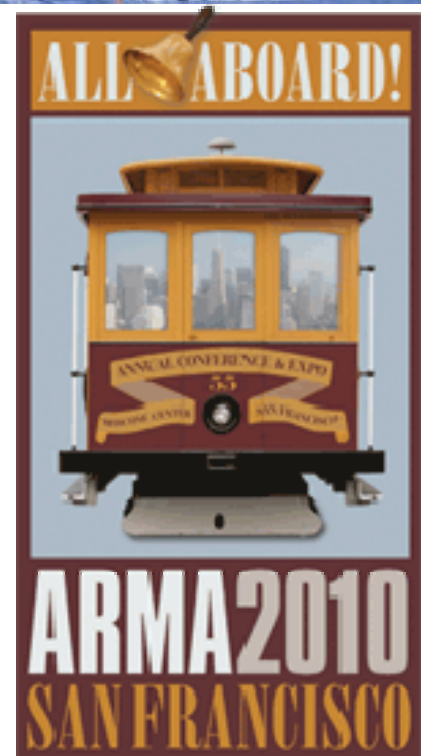
While we're on the subject of educational opportunities, I should mention that the 55th Annual ARMA International Conference and Expo is right around the corner. This year it will be just a bit later than usual. If at all possible, I urge you to attend this premiere event. Check out the details at www.arma.org. I hope to see you all November 7-10 at the Moscone Center West in San Francisco!

Another point that we discussed at Leadership last June was how to attract the younger professionals into our organization. How do we reach them? We reach them on their "turf". The Great Northwest Region is looking into our own page on Facebook. From there, we hope to point people to our region website.

Speaking of our website, have you visited it lately? If you haven't, you should! Our webmaster, Denise Simons, has been very busy working to make the site a more valuable asset for all of us. It's looking great and some new features are coming soon, so check it out at www.armagreatnorthwest.org.

The ARMA of the future will certainly look different than the ARMA of the past. We in the Great Northwest Region leadership are doing all we can to meet the needs of all of our members. If you have a new idea or a suggestion on how we can improve on an old one, please let us know!

Marc Simpson, GNW Region Manager



“Ask the CRM”

Bob Dalton, CRM

Reviewing Records for Destruction— Do you have any tips on reviewing records for destruction? This question was recently asked by an administrator during a review of their department’s filing system.

Response: While an organization may have a good records management program on paper, with all the proper policies and procedures, there usually is something missing in the process; the lack of consistent and timely reviews of records past their retention period. I am sure that many of you can relate to this problem. As I have stated in previous articles, this is not unique to any one organization, private or public. Without a systematic approach and staff assigned and trained to manage the program your records will not be reviewed regularly.

Here are a few things that I have found that work effectively with any records review:

- If you have an existing records management database, you can create a listing of records that are due for destruction for each client or department within your organization. Annotate those that may be over-due for review. If you suspect an error in the retention period, write a comment on the index that the record may require additional retention.
- If you use an outside vendor to manage your business records, they probably have the ability to create listings of records due for destruction. The major vendors in my area have electronic systems that allow the customer to create and publish listings based on criteria established by the customer. Vendors will also create reports to your specifications for a fee.
- If your lists of records transferred to storage (transmittals) are in paper mode only, start by reviewing the transfer notices of the oldest boxes in storage to insure the information on the transmittal accurately describes the records within the boxes. I have found over the years that not all records shipped to storage were accurately described. I have encountered transfer notices that did not include the dates of the records within the boxes. Box contents on the transfer notices simply labeled “Projects”. Each box with missing or misleading information will require individual inspection to determine the contents and see if they can be destroyed or re-indexed with the proper information to identify the contents.
- As Ellie’s father said in the movie ‘Contact’; “Small moves Ellie, small moves”. The same goes with a records cleanup. Hopefully, the client will review the listing and approve the destruction of the records. However, if you cannot get an approval of destruction of the collection, arrange to review them in small amounts. You will have a better chance of getting the cooperation of the reviewer if they are not overwhelmed by the task. The smaller the amount of records the client has to review, the better.
- Secure a dedicated room to store and review the records so the client does not have clutter in his/her area. You probably already have the clutter in your own office. If you have a collection of records off-site at a commercial records center you may be able to arrange a room to view the records at their site. Generally, there is a charge to using this viewing room. Try to have the client set aside specific time during the work day for review and management of their records. Emphasize the importance of time management. I had clients actually request I put a few records at a time in their chair every morning to review.
- If the actual owner of the records cannot or refuses to complete the review, you might have to find a person with the authority to approve the destruction and/or would be willing to have

Continued on next page

someone else who is knowledgeable perform the task.

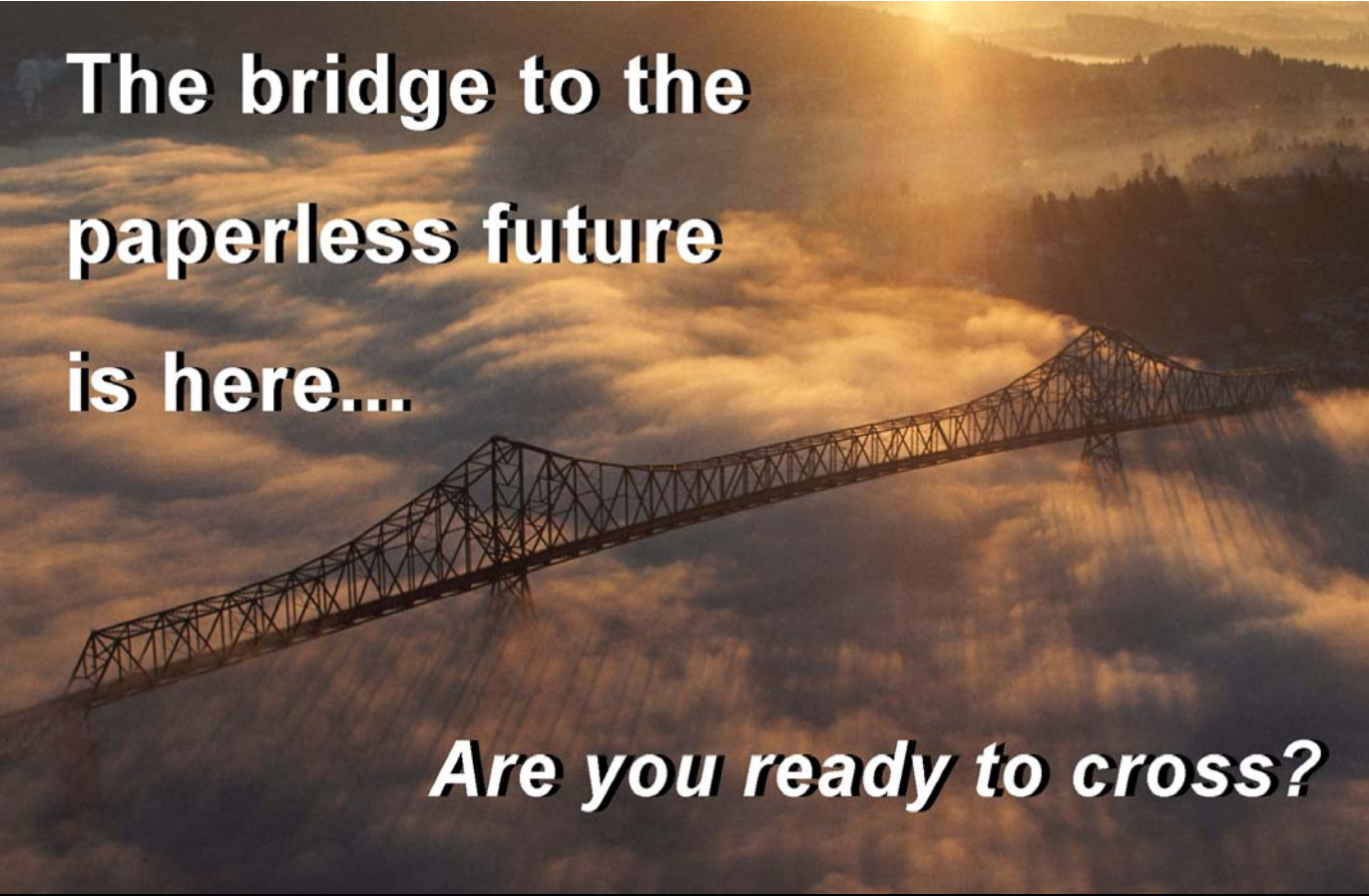
- Try to secure a champion from upper management who will help promote an annual records review program so that it becomes a requirement, not an option.
- Review all boxes in storage to insure that they have an appropriate retention period. If your local or state agency within a state that has a formal records management program, use or create a destruction notice that meets the state's guidelines. Once you have destroyed the backlog, the annual review should become much easier if done on a regular basis.
- If you have an onsite records center and/or special areas to store records, do not let them become a dumping ground for non-records. Insist on control of the environment to insure the protection of the records from unauthorized use and review. This is easy to say but a challenge to do. I have taken photographs of poorly managed storage areas and used them successfully in presentations to management staff to emphasize potential risk to their organizations.

The cleanup process is probably one of the more stressful parts of a records managers duties. However, when you have completed the cleanup of the backlog you should feel satisfaction for successfully accomplishing the task.

OREGON ARMA CHAPTER MEETING SCHEDULE

MONTH	Board Meeting	Chapter Meeting
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



**The bridge to the
paperless future
is here....**

Are you ready to cross?

**Discover how Archive Systems is changing the way
Oregon manages documents.**

Everyone sees a future that is increasingly paperless, but paper continues to play a major role for every company today. Archive Systems delivers a bridge to that future by integrating digital technologies with state-of-the-art records management services. From business records storage and Virtual File Delivery to on-demand document management and accounts payable automation, we offer the services and solutions that will help you make the journey at your own pace.



23070 NE Townsend Way
Fairview, OR 97024
www.archivesystems.com

Business Records Storage | Secure Document Shredding | Offsite Data Storage
Virtual Records Center | On-demand Document Management | Imaging and Workflow Automation

OREGON CHAPTER OF ARMA INTERNATIONAL

Meeting/Seminar Registration Form

Oregon State Archives—Mary Beth Herkert and tour

Tuesday, October 12, 2010—12-2 p.m. (please arrive by 11:45 a.m.)

Bring brown bag lunch

LOCATION: Oregon State Archives presentation by Mary Beth Herkert and tour

**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=127>

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

Register online at OREGONARMA website

Phone: 503-972-2623 - Cheryl Dorman

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

Email: crd@inigroup.com

Or Mail form and payment to:

ARMA Oregon

P O Box 40004

Portland, OR 97240

Name: _____

Phone: _____

Company Name: _____

Name(s) of Guests(s) _____

REGISTRATION DEADLINE:

Reservations required by October 8

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

www.oregonarma.org



OREGON ARMA OFFICERS

President	Cheryl Dorman crd@inicigroup.com	inici group, Inc. 3030 SW Moody Ave, Suite 104 Portland, OR 97201	503-972-2623 (O) 503-274-2908 (F)
Vice President Programs	Bruce Schinkelwitz, CRM bruceschinkelwitz@me.com	8868 SW Amicus Terrace Beaverton, OR 97007	888-901-3401 (O)
Vice President Facilities	TracieLyn Rydzewski tracielyn.a.rydzewski@intel.com	Intel 14533 Walnut Grove Way Oregon City, OR 97045	503-680-6974 (O)
Secretary	Debbie Baidenmann dbaidenmann@ci.beaverton.or.us	City of Beaverton P O Box 4755 Beaverton, OR 97005	503-526-2436 (O) 503-526-2479 (F)
Treasurer	Dwight D. Wallis, CRM dwight.d.wallis@co.multnomah.or.us	Multnomah County Records Management 1620 SE 190th Portland, OR 97223	503-988-3741 (O) 503-988-3754 (F)
Webmaster Director	Tyrene Bada tyrene.bada@pcc.edu	Portland Community College 12000 SW 49th Avenue Portland, OR 97219	503-977-8583 (O)
Newsletter Director	Jane McGarvin, MMC jmcgarvin@ci.oswego.or.us	City of Lake Oswego P O Box 369 Lake Oswego, OR 97034	503-635-0236 (O) 503-697-6594 (F)
Education Director	Karen S. Green, CRM karengre@co.clackamas.or.us	Clackamas County Records Management 270 Beaver Creek Rd, Suite 200 Oregon City, OR 97045	503-655-8656 (O) 503-655-8195
Membership Director	Kim Akimoto kimberlee.akimoto@gmail.com	TriMet 4012 SE 17th Avenue Portland, OR 97202	503-962-6489 (O) 503-962-3095 (F)
Immediate Past President	Timothy Hunt, CRM tim.hunt@portlandoregon.gov	City of Portland 1221 SW 4th Ave, Room 140 Portland, OR 97204-1987	503-823-4565 (O) 503-823-4571 (F)

2010-11 Great Northwest Region

Region Manager	Marc Simpson msimpso@co.pierce.wa.us	Pierce County Public Works	253-798-3563
Region Coordinator	Jennifer Winkler jennifer.winkler@seattle.gov	City of Seattle	206-684-8154
Region Treasurer	Timothy Hunt, CRM tim.hunt@portlandoregon.gov	City of Portland	503-823-4565 (O)