



December 2010
Volume 42, Issue No. 4

2008-9 and 2009-10 ARMA International
Newsletter of the Year Award Recipient



For the Record
Newsletter of the Oregon Chapter

ARMA INTERNATIONAL—The Information Management Professionals

HOLIDAY CELEBRATION

PROGRAM: Vendor Appreciation

Date: Tuesday – December 14, 2010

Time: 5:30 p.m.—No host bar
6:00 p.m.—Dinner (buffet style)

Location:

Governor Hotel—Fireside Room
(May be moved to larger room)
614 SW 11th Avenue
Portland, Oregon

*The Oregon Chapter is providing this dinner to
all members and non-members*

*Please bring CASH or NON-PERISHABLE FOOD
for donation to the Oregon Food Bank!
(CASH PREFERRED)*



NEWS FLASH

Oregon Chapter Newsletter receives
ARMA International Newsletter of
the Year Large Chapter Award for
2009-10!

(See story on page 3)

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

www.oregonarma.org

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FROM THE SQUARE OFFICE

CHERYL DORMAN, PRESIDENT



Being Thankful

As we push ourselves away from the Thanksgiving table and rush into the Winter Holidays, we should keep in mind that we have much to be thankful for. Many of you may have seen job cuts this year or a downsizing to your department, so it may be easy to become overwhelmed with work, holidays, travel, Christmas programs, and everything that goes along with the Holiday Season.

At our Annual Holiday Dinner this year, I'd like to say thank you to our vendors. We are offering a chance for them to provide us some highlights about themselves and their companies. We will be meeting again at the Governor Hotel on Tuesday, December 14, for a buffet dinner. After dinner, those who would like to give a brief presentation on their company and what they can offer to Oregon ARMA chapter members are welcome to do so.

The only cost for our Holiday Dinner will be donations for the Oregon Food Bank. We will be accepting food, but cash donations are preferred. Throughout the chapter year for 2009 and 2010, we were able to collect over 200 pounds of food. I think this year we should be able to top this donation in dollars. Let's do what we can to help those in our community this holiday season who need a little extra support.

During your preparations for the holidays, whether it be for work, home or family, pause and take a moment now and then to reflect on the last year and be thankful for what you have. You might be surprised at how blessed you really are.



Happy Holidays Oregon ARMA Chapter!

OREGON ARMA CHAPTER MEETING SCHEDULE

MONTH	Board Meeting	Chapter Meeting
December	December 13	December 14—Governor Hotel Holiday Dinner
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

NEWSLETTER AWARD

JANE MCGARVIN, NEWSLETTER DIRECTOR



President Cheryl Dorman presenting award to Jane McGarvin, Newsletter Editor, at the November 16, 2010 Chapter meeting



On November 6, at the ARMA International Conference Awards Luncheon, the following comments was made when the Large Chapter Newsletter award was presented:

This newsletter has outstanding consistency, quality of information, features tips on industry related topics, a very nice touch is the membership anniversary information... And the winner is.....

Oregon Chapter for the Large Category

This was the Oregon Chapter's second consecutive year that the Oregon Chapter has received the award. Thank you to Board members Cheryl Dorman, Kimberly Akimoto, Karen Green, Tim Hunt, Bruce Schinkelwitz, Tyrene Bada, Debbie Baidenmann, and member Sue Nelson for submitting articles for the newsletter. Newsletter Editor Jane McGarvin also writes and edits articles, and prepares the layout of the newsletter.

Members are also encouraged to submit articles or news for the Newsletter.

Congratulations!

Large Chapter Category Oregon Chapter



Editor: Jane McGarvin
Accepting: Cheryl Dorman
Presenting: Temple Murray



MEMBERS ONLY

Your exclusive pass to RIM resources and membership benefits
Kimberlee Akimoto, Director of Membership

Hello Oregon ARMA members!

Here is the membership update for December 2010:

The following Oregon ARMA member is celebrating her milestone membership anniversary in December:

Leontyne Tanewasha-Davis 5 years

Other membership anniversaries:

Lynn McDermott	18 years
Walter Williams	16 years
Kimberlee Akimoto	8 years
Matthew Oftedahl	8 years
Amber Ames	2 years
Isabel Bracamontes	1 year
Karen Nielson	1 year

Congratulations to all of you!



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Newsletter Editor—Jane McGarvin
 Cheryl Dorman, Chapter President

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2010 ARMA International Conference San Francisco Reflections on the Expo

Bruce Schinkelwitz, CRM
Vice President, Programs

The 2011 ARMA International Conference in San Francisco provided attendees with a great opportunity to attend the vendor Expo on the main floor of the Moscone West Conference Center. The Expo featured over 100 vendors exhibiting over two full days, with a number of newer faces amongst the many long-time ARMA vendors.

Some of the trends in the Expo included the continuing growth of eDiscovery products and services, the arrival of cloud computing firms, and the expanding interest in services and products built upon Microsoft SharePoint 2010.

Both established Enterprise Content Management (ECM) vendors (EMC, IBM, OpenText, HP) and newer arrivals such as AccessData, ALM, Contoural, D4, H5, IE Discovery, RenewData, Xybion, and Zapproved provided solutions aimed at the eDiscovery market. The emergence of these latter new names indicates an interesting shift from the dominance of the big ECM firms in the records management industry. Whether these firms can grow and compete over time will be interesting to watch.

Cloud computing has become the hot topic in information governance over the past 1-2 years. With a great deal of data moving to cloud-based storage systems, records managers have awoken to the serious issues raised by dispersed data storage across platforms managed by third-party providers that may be continents apart. The arrival of vendors such as Box.net and PageFreezer at the ARMA Expo hints at the potential for this to be the hot topic at ARMA 2011.

SharePoint has been on the scene for a number of years with its 2007 SharePoint Server platform. This year's Expo featured a large booth by Microsoft and an 'Immersion Lab Experience' consisting of 45-minute hands-on sessions for participants to experience SharePoint 2010 with its supposedly enhanced records management capability. A number of SharePoint partners attended the Expo, demonstrating the two-pronged approach by Microsoft of developing its own solution while supporting partner solutions such as those by Trinity Technologies, Knowledge Lake and Gimmel Group.

It was interesting to observe how again attendees can get excited about even traditional vendors exhibits, such as the large and colorful booths by Iron Mountain, EMC, and Recall. Apple iPad and iPod raffles and free t-shirts were definitely the crowd pleasers. The biggest crush of all was saved for last: the ARMA Grand Prize Raffle, where lucky winners took home both cool gifts and substantial cash prizes up to the Grand Prize of \$1,000!

**Please bring cash or non-perishable
food to the Holiday dinner on
December 14 for donation to the
Oregon Food Bank**

Check It Out

Karen Green, CRM
Director of Education



It's official! I'm retiring January 1, 2011! Our local ARMA chapter asked me to share what I've done over the years, along with any advice to my ARMA friends.

Like most of you, I really didn't plan to make a career in records management. It was a gradual process. I had been working as an administrative assistant, when I read of a job opening for a "Records Specialist." After a few years, that job morphed into "Records Technician." After a few more years, I applied for a records manager position—and was hired.

As manager, I quickly realized that it can be very difficult to find qualified applicants with records management experience. Maybe that's why I was able to move into a records manager position. I had no management experience, but I had worked in records management for years. I've since moved on to a second records manager position.

My advice:

Never pass up an opportunity to learn and grow professionally. Attend ARMA meetings. Network and get to know others in your chapter. If you are fortunate enough to work for an organization willing to budget for records management training, then take every opportunity to attend annual ARMA International Conferences; semi-annual ARMA regional conferences; on-line classes, seminars and webinars offered by ARMA (some are free). There are also other on-line classes in records management; some offering a certificate.

I became a CRM without a college degree. It can be done. Check out the application process by visiting the ICRM website. I was required to provide transcripts from college classes I had taken, along with documentation of my records management experience and training. I was fortunate to work for an organization willing to reimburse me for the application and testing fees. To prepare, I used the ICRM handbook and studied for several months leading up to the exams.

Becoming a CRM was a lot of work. I attribute my success to being encouraged by my ARMA friends. I was also motivated by my boss at the time. He made it very clear when he hired me that he expected me to become a CRM. Encourage and motivate yourself and your ARMA friends to become a CRM. The CRM designation validates knowledge and professionalism in the field of records management.

The Oregon Chapter wishes Karen the best on her retirement!

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

November Chapter Meeting Recap

Jane McGarvin, Newsletter Director

The Chapter meeting on November 16 was attended by 18 members at Ernesto's Italian Restaurant in Portland, where members who attended the ARMA International Conference in San Francisco reported on sessions they attended. President Cheryl Dorman presented Vice President of Programs Bruce Schinkelwitz's report about the ARMA International Conference from a vendor perspective. He had noted the Immersion Experience labs that were 45 minutes in length were always full, the industry sessions were great, GARP was a hot topic throughout the conference, and the trends for the future were Cloud Computing, eDiscovery, and Box.net were presented in many sessions.

Cheryl noted there were many of the same vendors in the Expo area, but also many new ones who were providing great information to the attendees.

Sue Nelson, Beaverton City Recorder, noted that Clearwell and Kroll now have ediscovery components, and spent time with these two vendors. A presentation will be made at the City Council by the State of Oregon Archives Division on TRIM, and TRIM works will with Clearwell.



Oregon Chapter Member of the Year Award

President Dorman presented Elly Bracamontes with her CHAPTER MEMBER OF THE YEAR award. Elly then reviewed some of the sessions she had attended. She noted five years ago at her first ARMA conference in Chicago, she attended many RIM 101 classes that were offered, and was totally overwhelmed, and felt like a kid in a candy store.

Since then, her company has grown and her position has expanded.

(Continued on next page)

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			
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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

She attended a full day session on Saturday on governance and compliance in the SharePoint World. They also spent quite a bit of time on the GARP Principles. At one of the Fellows forums, there was a lot of lively debate about what records managers should and shouldn't be, followed by a legal review of record retention schedule, and electronic records management. Since her company has facilities all over the world, and employees need to receive training, she attended a session on Online Training for Employees.

She attended a session on Cloud Computing. This session brought home the importance of making sure to include steps in their contract to ensure the integrity of their data, and their need to get information back in a format accessible to the company. Horror stories were shared of companies who were unable to restore their information to a usable format.

A session that hit home for her was one on the power of listening and asking the right questions. As her company moves toward e-records management, she will be doing more interviewing of vendors, so she needs to be sure she asks the right questions, and then listening for the answers to those questions.

She was fortunate that her supervisor also attended the conference, and they were able to talk about how each session's information could be used in their company. Even on the plane home, they were talking about strategy, what they planned to present at the next steering committee meeting, and what to focus on. She shared some of the handouts at a high level steering committee.

Elly noted that as she attended the opening ceremonies when the Colbalt Award was presented, she thought her company, NACCO Materials Handling Group, also does a lot of the same things that was highlighted during the presentation. After the presentation, she was approached by several people urging her to consider submitting an application about her company for the award next year.



Oregon Chapter Leader of the Year Award

President Dorman presented Tyrene Bada, Webmaster, with her CHAPTER LEADER OF THE YEAR award. This was a new ARMA award this year.

Tyrene explained that she was the first person hired to coordinate the official records at Portland Community College (PCC) three years ago, and she started from scratch to create a records program for the 100,000 students enrolled at PCC at 18 locations. The program

started with just her and no budget.

In 2008, she attended the ARMA International Conference in Las Vegas, when she used vacation time to go, paying for her hotel and flight, and attending just the Expo and awards dinner. She found that the vendors and other ARMA members were willing to listen and answer questions. Last year, she again paid her own way to Orlando, and attended the Expo, where she visited vendors and asked questions.

Continued on next page

Having received the Chapter Leader of the Year Award, she was very energized about the conference, and also had more knowledge than when she first started in 2008. She reminded the group that ARMA has developed five core competencies, including leadership, records management, information technology (IT), marketing, with five levels from beginning to expert levels. She noted each session has a ranking based on the core competencies, to give each person an idea of the session before they attend it. She focused on “level 2” sessions.

She attended a session presented by the records manager from Walt Disney Company, and she loves everything Disney! However, that while the Disney Company has lots of resources, they face the same struggles as many other companies—getting the higher managers to buy into the records management program, and getting the support for their programs.

She also attended a presentation by Allan Smith who works for Oregon PERS. She attended the session because his job is quite similar to hers, works for an Oregon State Agency, and therefore has to follow the same laws the regulations that she does. The presentation was on how to convert all the records from microfilm/microfiche to a digital format. She hopes that he will be able to make a presentation at a future Chapter meeting.

Coming home from the airport, she excitedly told her boyfriend about the conference, all the things she would like to do, and how to get more buy-in from management. She can hardly wait until her boss returns from vacation, so she can begin sharing her ideas and present plans.

Others who spoke about the conference were David Hildebrandt from SAIF, and Vicky Stegmann from NMHG.



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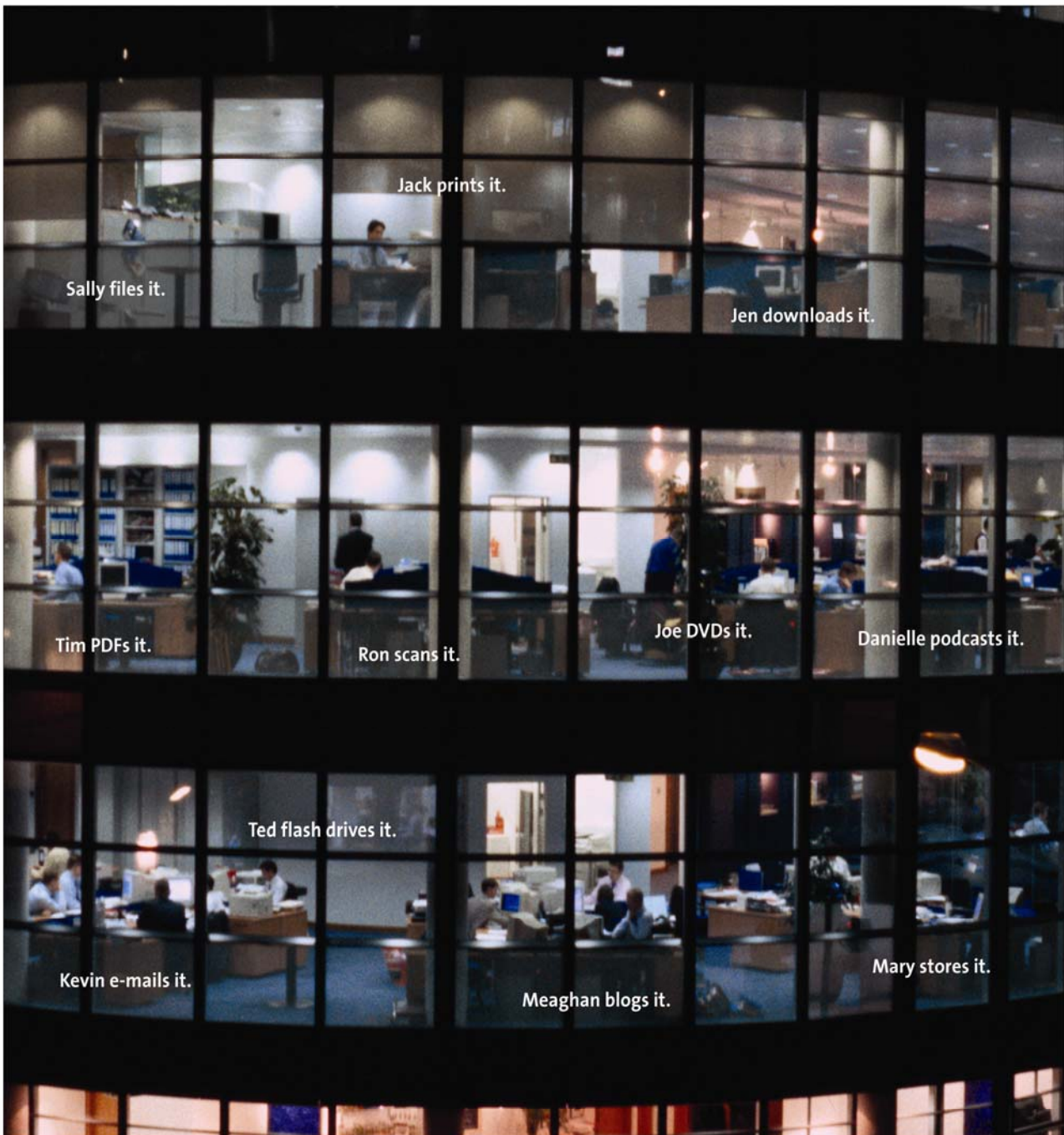
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Message from the Great Northwest Region

As of this writing, I have just returned from San Francisco and the 55th ARMA International Conference and Expo. My shuttle to SeaTac airport picked me up at 4:50 a.m. on Friday, November 5. Good thing I had a chance to snooze on the plane. From the time we landed in San Francisco until we took off heading for home the following Wednesday, it was non-stop. After two days of Region Managers and Coordinators strategic planning meetings, meeting with the ARMA Board of Directors, the Awards Luncheon, Chapter Leadership and the Welcome Party...whew (deep breath), the Conference and Expo started in earnest. Again, there were great sessions, lots to learn on the vendor floor and a great time to be had. And there's much to do in the evenings! The Canadian Party is always one of my favorites.



This year, Jenny and I were thrilled to be joined by 32 members from our Region for a Region lunch. All of our chapters were well represented just as all of our chapters were well represented at the conference. The estimated overall attendance of the conference was approximately 1,500, of which 113 were from the Great Northwest Region! Way to go Great Northwest! But the best part of the lunch was honoring our award winners. And we had a lot to celebrate!

First, hats off to all of you who are your chapter's Member of the Year. We cheered and applauded when your names were up on the big screen. You will be receiving an award from ARMA International soon.

ARMA instituted some new awards this year. Next up was chapter Leaders of the Year. Again we cheered and applauded! You will also be receiving an award from ARMA soon.

Other new awards included Chapter Recruitment Awards. These went to chapters who finished their year with more members than they started the year with. In today's economy, that's quite an accomplishment! Congratulations to the Columbia Basin and Greater Anchorage Chapters for achieving this!

The Chapter Participation Award is another new one. While many chapters are scratching their heads wondering how to increase participation, our Greater Seattle Chapter has excelled at it. Good going Seattle!

Then there are the new Special Merit Awards. These awards set certain criteria for chapters to achieve. There are awards at the Bronze, Silver, and Gold levels. A chapter must accomplish everything on the Bronze level before moving up to Silver and then Gold. No chapters in ARMA have reached the Gold level yet and only 2, yes, only TWO have made it to the Silver Merit Award. Congratulations to the Greater Anchorage Chapter for receiving the Silver Merit Award!

And then it was time for Newsletter-of-the-Year presentations. You'll remember that last year, Boise Valley won in the Medium Chapter Category while Oregon took home the Large Chapter

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Category honors. Could they repeat?? You'd better believe they did!! Congratulations to Boise Valley and Oregon and especially Amity Highly and Jane McGarvin, their newsletter editors! Wow. You really shined!

But the greatest honor of them all came the next day during the opening ceremonies. There is no higher honor in all of ARMA than to be admitted to the Company of Fellows of ARMA International. There are very few individuals ever admitted into that elite company. This year, ARMA admitted number 44. Long overdue, the Company of Fellows has admitted to its ranks a favorite son of the Great Northwest Region. Please join me in congratulating Dave McDermott, CRM, FAI. Well deserved Dave!!

So what more can I say? I had a great time. I learned a lot. I met up with some old friends and made some new ones. And once again, as always, I was very proud to be a part of the greatest region, the Great Northwest Region!

Marc Simpson
Region Manager

“Ask the CRM”

Bob Dalton, CRM

Question: What do you know about Cloud Storage?

Response: I told the individual asking this question that the use of Cloud Storage is a hot topic on the records management listserv with various articles discussing the pro' and con's of outsourcing storage of electronic records storage to the Cloud. Cloud storage is one of the latest “buzz words” being used by vendors to promote a service to organizations. Based on my review of current literature many organizations are looking into outsourcing their important business information to reduce the cost of their information technology functions. As records management professionals in an organization we are probably not included on the decision making team evaluating the use of the Cloud strategy. We are usually in the re - action phase and only thought of after the fact and/or when someone realizes the information that is being outsourced may have unforeseen consequences by being in the cloud environment in the event of a litigation, retention, retrieval, etc.

As reflected in the “Guidelines for Outsourcing Records Storage to the Cloud”, sold by ARMA International, 2010, Gartner defines Cloud Computing as “A style of computing where scalable and elastic IT - enabled capabilities are delivered as a service to external customers using Internet technologies”. The publication became available in late October in both paper and pdf format and should be a good resource regarding the use of Cloud technology for the RIM professional. The publication comes with checklist that can be used by an organization considering the use of the technology.

As mentioned earlier the main benefit for the use of Cloud computing is cost saving. The publication mentioned above and others list the risk factors. Some of the risks are:

- Accessibility – the ability to retrieve 24 hours a day/7 days a week
- Data Security - how to preserve and protect data to avoid problems in the retrieval process
- Data location – Where is it stored. There may be privacy and data protection issues.

(continued on next page)

- Data Segregation – How do they manage the segregation of the data for multiple owners sharing the same application and servers.
- Data Integrity – How do they manage backup, recovery and retention issues?
- Data Ownership – Requirement for solid contract with provider on ownership issues.

For further information on Cloud Computing/Storage, I recommend the following articles:

“Cloud Computing: Can You Retrieve your Data?” published by CFOInnovationsAsia, October 2010.

Article discusses worse case scenarios by an organization of the need to audit and/or litigation. I’ve bookmarked this website for further review. <http://www.cfoinnovation.com/content/cloud-computing-can-you-retrieve-your-data>

Other articles on Cloud Storage from this same resource:

“Cloud and the CFO Reality Check – Finance” published by CFOInnovationsAsia, 19 October 2010

<http://www.cfoinnovation.com/content/cloud-and-cfo-reality-check-finance>

“The CFO Cloud Computing Nightmare” published by CFOInnovationsAsia, 28 August 2010

<http://www.cfoinnovation.com/content/cfos-cloud-computing-nightmare>

“When Cloud Computing and Compliance Collide”, ComplianceWeek, 11 October 2010.

Also read some of the comments from readers at the bottom of the article. <http://www.complianceweek.com/blog/kelly/2010/10/11/when-cloud-computing-and-compliance-collide/>

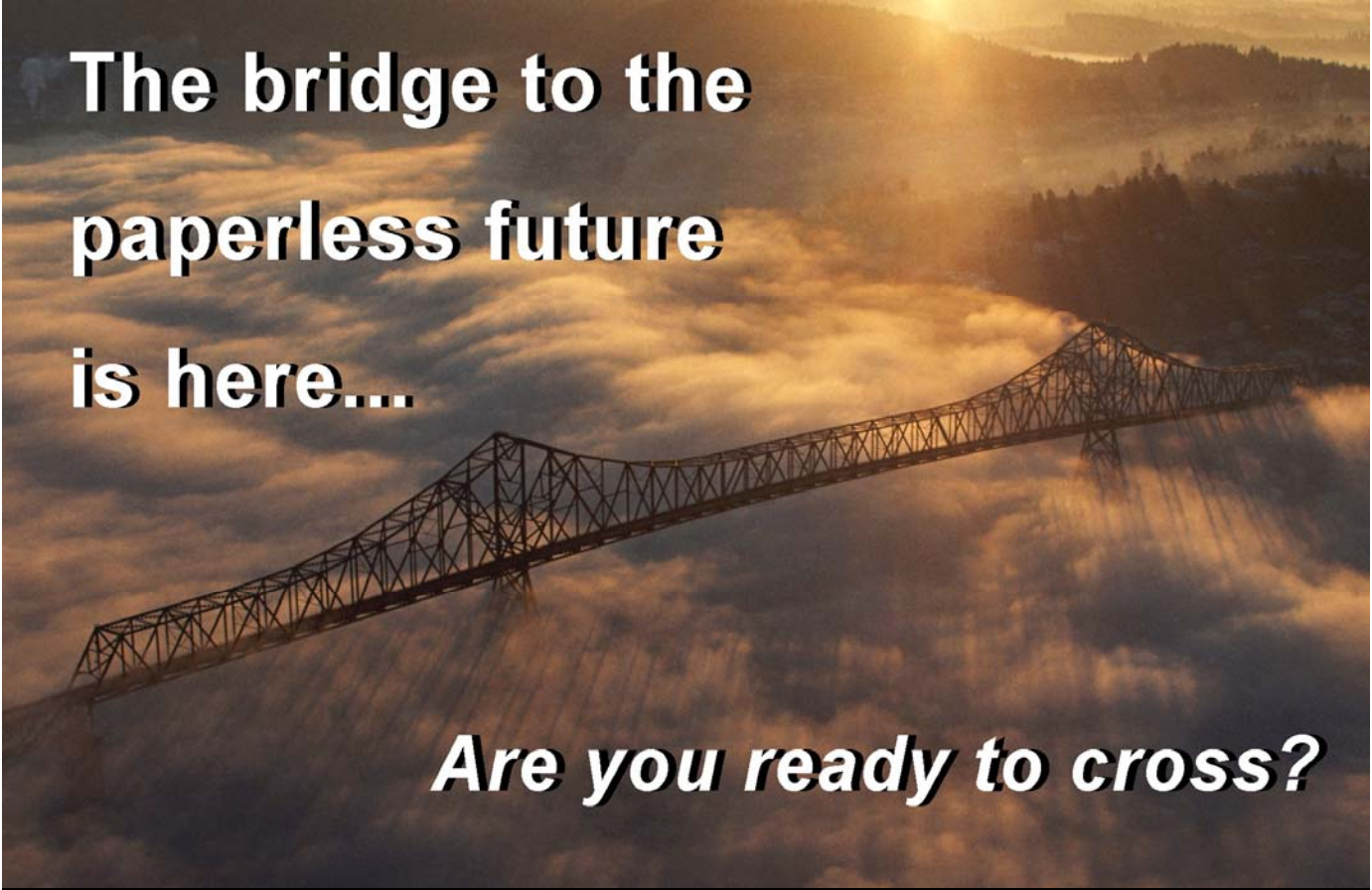
“What’s The Problem With Cloud Security? There’s Too Much Of It...”, Rational Survivability, 17 October 2010.

Article contains technical information with comments from readers on the Cloud structure methodology. <http://www.rationalsurvivability.com/blog/?p=2693>

In closing, while I believe many organizations will take advantage of the benefits of Cloud storage, RIM professionals are tasked to be aware of the problems an organization may have if our employer implements Cloud Storage. I hope the resources outlined in this article will be useful to the RIM professional becoming aware of both the positive and negative points of use of this product .

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.



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OREGON CHAPTER OF ARMA INTERNATIONAL

Meeting/Seminar Registration Form

OREGON ARMA CHAPTER—VENDOR APPRECIATION AND HOLIDAY CELEBRATION

Tuesday, December 14, 2010

5:30 p.m. (No host bar); 6:00 p.m. (Buffet Dinner)

LOCATION: Governor Hotel, Fireside Room, Portland
(May be moved to different room)

Click on <http://www.oregonarma.org/meeting.php?ID=131>

Buffet Dinner

Cost: Free, No host bar

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Name: _____

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Name(s) of Guests(s) _____

REGISTRATION DEADLINE:

Reservations required by December 10

Oregon ARMA
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