



February 2011  
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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

## ***PHOTOGRAPHIC RECORDS*** **DEE WISE**

**Date:** Tuesday – February 15, 2011  
*(note date change)*

**Time:** 3:30—5:00 p.m.

**Location:**

David Evans & Associates  
2100 SW River Parkway  
Portland, OR 97201

*(See Map on Page 3 and directions on page 10)*

**NOTE:** *President Dorman will provide parking code for onsite parking when she confirms your registration.*

**COST:** \$10—Members; \$15—Non-Members

**Program Description:** Learn how Dee has converted her photographs (taken over 35 years) to digital format and they are organized.

**Speaker bio:** Dee Wise is the Records Manager at the Portland-based law firm of Dunn Carney Allen Higgins & Tongue, LLP. She has 30 years of experience in the records and information management (RIM) profession. Prior to joining Dunn Carney, Dee was the Senior Records and Information Specialist for the City of Ti-

*Continued on next page*

Oregon ARMA  
P. O. Box 40004  
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gard, assisting City attorneys with the discovery process during Dolan v. City of Tigard, a landmark case regarding the practice of zoning and property rights that went to the U.S. Supreme Court in 1994. In addition to the legal and public sectors, Dee has also held RIM positions in the utility and banking and mortgage industries.

Dee has been an Oregon ARMA member for 15 years, and has served on the local chapter Board of Directors, as the Great Northwest Region Coordinator and Manager, and a member of the ARMA International's Elections Management Committee.

*Please use Mapquest.com to get specific directions to David Evans & Associates, 2100 SW River Parkway.*

*General directions are on page 9.*

*Parking at DEA*

- *Metered parking is available around the building.*
- *Parking is available in the gated lot at the end of SW River Parkway. You will need to enter a code to open the vehicle gate and to exit and enter the lot through the pedestrian gate.*



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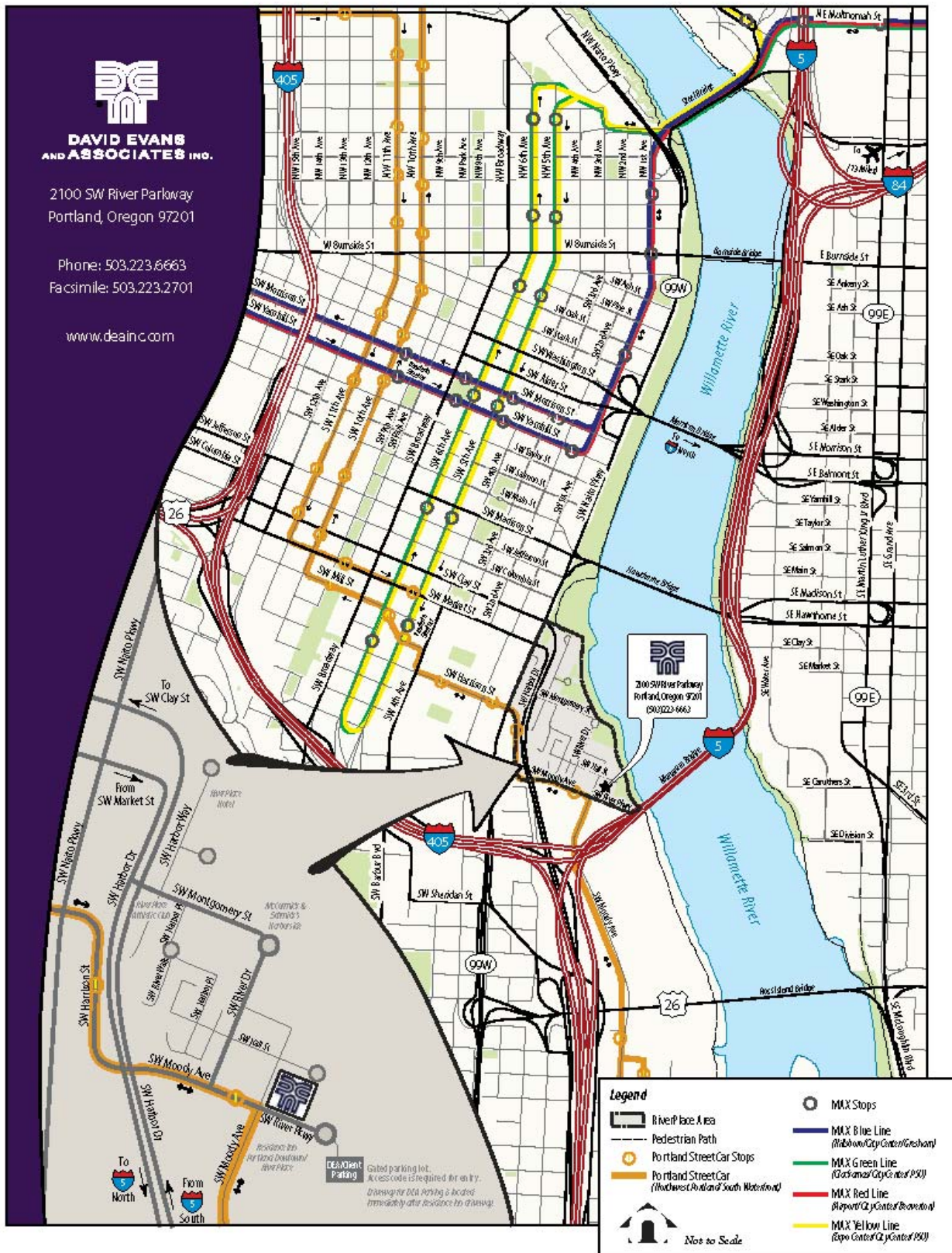


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## FROM THE SQUARE OFFICE

CHERYL DORMAN, PRESIDENT



### Treasure Hunting

Sometimes being a Records Manager also means you are a Treasure Hunter. I remember the days of going to a library to find books. Libraries use the Dewey Decimal Classification (System) which organizes books on the shelves in a specific and repeatable order that makes it easy to find the books you are looking for and return them to their proper location. I was always fascinated at how the system worked. It was always like a mini treasure hunt for me – find the book in the card file (before the days of computer), locate the shelf it was on, then ultimately find the book.

For Christmas, my husband and I were given a hand held GPS unit. With that, we have been introduced to the idea of Geocaching. There are many different varieties of geocaching, but the basic idea is to use a GPS system to hide and seek containers called “geocaches” or “caches” anywhere in the world. It is often described as a game of “high-tech hide and seek” and has been going on for 10 years. I have yet to find my first geocache, but I’m still learning about the game. Being more of an outdoor sport, I’m still waiting for that rare sunny day before I go traipsing around looking for a geocache.

As a Records Manager, finding certain records – a specific file or a simple piece of paper – can be like a treasure hunt. First, you must gather all the clues. Talk to people. Ask who has seen “the record.” Trace the history. Create a map with the information you’ve gathered. From there, you locate the long lost file box, usually underneath someone’s desk. Somehow you’ve managed to put the puzzle pieces together to find that hidden or lost record and have that wonderful “ta-dah” moment when you pull the record you need.



ARMA has many treasures, some hidden and some right out there for anyone to find, especially within the Oregon chapter. One of those treasures is Dee Wise, our speaker for February. She has been with ARMA for many years and has gained valuable experience working with records, most recently at Dunn Carney Law Offices. We are looking forward to have Dee share the wealth.

**MARCH CHAPTER MEETING**—The Oregon ARMA Chapter is proud to join with Oregon Association of Municipal Recorders for an all-day seminar in March in lieu of our regularly scheduled chapter meeting. The seminar will highlight the many aspects of digital records and will be held on Thursday, March 10, at the City of Albany. We are in the process of finalizing the agenda, but we can tell you that the seminar will be offered to everyone at no charge. Lunch will also be provided by HP as they take a few moments to share with us the latest trends for the HP Trim software. Watch your emails, as more information is coming soon.



## 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 February 2011:

Welcome Andrew Penta, our newest member!

The following Oregon ARMA members are celebrating their membership anniversaries in February:

Alan Smith	4 years
Norma Alley	3 years
Lisa Martinez	2 years
Ken Begley	2 years

Congratulations to all of you!



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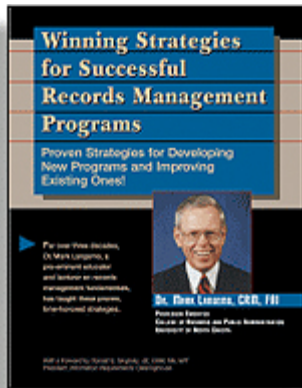
Cheryl Dorman, Chapter President

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## CHECK IT OUT

### KIMBERLY WOLLENBURG DIRECTOR OF EDUCATION



#### Winning Strategies for Successful Records Management Program: Proven Strategies for Developing New Programs and Improving Existing Ones!

Author: Dr. Mark Langemo, CRM, FAI

ISBN: 0-929316-50-9

Does your company...

- Have an incalculable accumulation of electronic, paper, and other records?
- Need better access to this accumulation of records and information?
- Not have a records management program or have one that isn't working?
- Know what electronic, paper, and other records it has?
- Have legal exposure because of records retained too long or eliminated too quickly or simply cannot be easily found?

Records management has emerged as a significant issue and is no longer just an ongoing concern of records management professionals. There are legal, economic, and practical reasons to clean up the mess, establish an appropriate records management program, and properly manage all an organization's records.

In *Winning Strategies for Successful Records Management Programs*, Dr. Langemo...

- states and explains his strategies.
- coaches how to successfully implement them as part of a successful records management program.
- offers practical advice to successfully develop and manage a records management program.
- gives what is needed to win the records management battle against neglect and indifference.

Library materials are available for loan to ARMA Oregon members. Take advantage of this valuable resource at: <http://www.oregonarma.org/library.php>. There are several members who have outstanding materials – I will be contacting you in next week or so to see if you see need the resource and make arrangements for return if you do not. I can be reached by phone at 503-742-4605 or by email at [kwollenburg@co.clackamas.or.us](mailto:kwollenburg@co.clackamas.or.us).

About me:

I'm a brand new member to Oregon ARMA and figured I'd leap right into the chapter by taking on a role as the Director of Education. This is a win-win situation for me since I can be involved as well as have resources at my fingertips as I take on the challenge of my new job as Document Management Analyst for Water Environment Services (WES) of Clackamas County in creating a records management program. I get the thrill of creating a program from scratch and definitely can use the support of fellow ARMA Oregon chapter members. I'm looking forward to getting to my chapter-mates.

## JANUARY CHAPTER MEETING RECAP INTERNATIONAL RECORDS MANAGEMENT CHERYL DORMAN, CHAPTER PRESIDENT

The Oregon Chapter was honored to have Michael Hoyle come to make a presentation on International Records Management. Michael is a consultant and works with the International Records Management Trust on three current projects, including Fostering Trust and Transparency in Governance, Yemen Justice and Policing Project and Sierra Leone: IF-MIS and Ministry of Foreign Affairs.



*Michael Hoyle*

The International Records Management Trust ([www.irmt.org](http://www.irmt.org)) was established in 1989 to develop new strategies for managing records and information. Based in the United Kingdom, it is supported by a consultancy team of over 60 professionals drawn from the public and private sectors and from academic institutions across the world. The Trust is set up to help manage records as a basis for improving operational efficiency and services, enhancing access to information, and providing an institutional record over time. Some of the records projects include Financial, Healthcare and Human Resource Management.

Michael has worked with such countries as Botswana, India, Sierra Leone and Tanzania to investigate and address the requirements for building integrity in public sector information systems in the ICT environment. He provides consultations with senior officials and conducts meetings and presentations to help them understand the world of records management and the value of electronic records.

At the meeting, he showed a DVD entitled "Ghost Busting: Building Payroll Integrity in Sierra Leone." This DVD will be available in our library soon, and is a great reminder of how important records are. If you would like to learn more about Michael Hoyle and the International Records Trust, his presentation is available on our website and contains information on how to get in touch with him.

### 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

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Email: [jmcgarvin@ci.oswego.or.us](mailto:jmcgarvin@ci.oswego.or.us)



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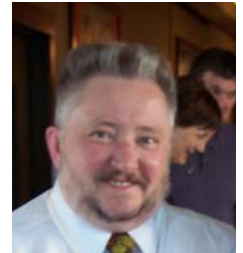
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## Message from the Great Northwest Region

One day a few months ago, prior to attending the ARMA International Conference, I looked over the sessions being offered. I remember reading about the sessions regarding clouds and cloud computing. Although I had something of an idea of what a cloud is, still I thought, no pun intended, that clouds were simply over my head. But then in his comments during the opening session in San Francisco, ARMA International President Nick De Laurentis's challenged us all to learn more about the emerging technologies. When Nick speaks, I listen.



The next morning brought a session on cloud computing. I took a deep breath and went to it. Not too long into the session, it became clear that perhaps I knew a bit more about clouds than I thought. Suddenly it was like I had been hit in the face with a book, well, actually Facebook. Yes, I am on Facebook. In fact, I admit to being a Facebook junkie. And yes, I admit that I play several of the games. So as I sat listening to the presentation in San Francisco and the presenter showed us her virtual meeting room and described many of the things that one could do in it, all I could think of was YoVille. Suddenly I realized that not only had I been in a cloud, but my house in YoVille was a series of virtual meeting rooms! Now I know how many things one can do in that environment and that got me to thinking. As the session ended, I turned to Cheryl Dorman, President of our Oregon Chapter and said that I think the Great Northwest Region could really use a virtual meeting room. Think of the possibilities! Chapters could use it to hold virtual chapter meetings, webinars or workshops. Boards and various committees could occasionally use it when getting together is difficult or impossible due to weather or other difficulties. The possibilities are too many to not pursue this.

As you know, the GNW Region currently has a task force that is putting together a program for February that will be webcast to you. Details about the webcast will be available soon on our website if not emailed to you as well. This is a great initial step forward.

With many hotels increasing their prices, it is getting financially harder for chapters to hold monthly meetings, especially dinner meetings. It has also gotten harder for a number of members to get to meetings. Some of our members are just too far from a chapter to be able to attend in person. Perhaps it's time that we occasionally take our chapters out to our members. Webcasts and virtual meetings can be interactive when attended live. They also can be stored and accessed later at one's convenience. Just imagine that if you couldn't attend the live presentation, you could still see it later...in your jammies and your bunny slippers! Everyone from Barrow, Alaska to Fairbanks to Boise and Idaho Falls, to southern Oregon and the Palouse can have access to even more education. Chapters can share speakers. Brainstorm the possibilities!

Several people have asked me if webcasts and a virtual meeting room would replace our regular

*(continued on next page)*

monthly meetings. I certainly hope not! Networking is, in my book, still the greatest benefit of belonging to ARMA. I would hope that chapters or groups of members could still meet to attend a virtual presentation. The network you build, the friendships you make attending meetings, seminars and conferences is invaluable!

As we weather the economic storm, sprinkling in an occasional webcast or meeting in a virtual meeting room may just be the ray of hope many are looking for. My forecast for the Great Northwest Region is sunny days ahead with perhaps a cloud.

Marc Simpson  
GNW Region Manager

#### General Directions to David Evans & Associates, 2100 SW River Parkway, Portland, OR

##### FROM SALEM:

- Take I-405 Exit (#299B) toward US 26/City Center/Beaverton
- Take Exit 1A on left toward Naito Parkway
- Stay straight onto SW Harbor Drive
- Take 1st right onto SW River Parkway (2 blocks)

##### FROM DOWNTOWN PORTLAND:

- Get onto SLW Salmon Street
- Right onto SW Naito Parkway
- Left onto SW Harbor Drive
- Left onto SW River Parkway (2 blocks)

##### FROM BEAVERTON:

- Get onto Hwy. 26
- Take Market St. exit on left toward City Center
- Turn slight right onto SW Market St.;US-26E, which then becomes SW Harbor Drive
- Left onto SW River Parkway (2 blocks)

##### FROM EAST PORTLAND:

- I-84 Westbound
- Go across the Morrison St. Bridge
- Take Naito Parkway ramp towards I-5S/ Salem
- Take Front Ave. ramp toward I-5 S/Salem
- Turn slightly right onto SW Naito Parkway
- Turn left onto SW Harbor Drive
- Turn left onto SW River Parkway (2 blocks)

##### FROM OREGON CITY ON HWY. 43:

- Northbound on Hwy. 43
- Turn right onto SW Corbett Avenue
- SW Corbett Ave. becomes SW Water Avenue
- Turn right onto SW Sheridan Street
- Turn sharp left onto SW Moody Avenue to SW River Parkway

#### OREGON ARMA CHAPTER MEETING SCHEDULE

MONTH	Board Meeting	Chapter Meeting
February	February 7	February 15—New Date
March	March 7	Thursday, March 10 at Albany City Hall The Chapter will be inviting AIIM and Oregon Association of Municipal Recorders to attend this session on Digital Records
April	April 11	April 12—Ernesto's Speakers: Andrew SanAgustin and Sue Lord Records from a Legal Perspective
May	May 9	May 10 Annual Recognition of Members, and Swearing in of new officers

*Dates are tentative and subject to change*

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## 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.

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**

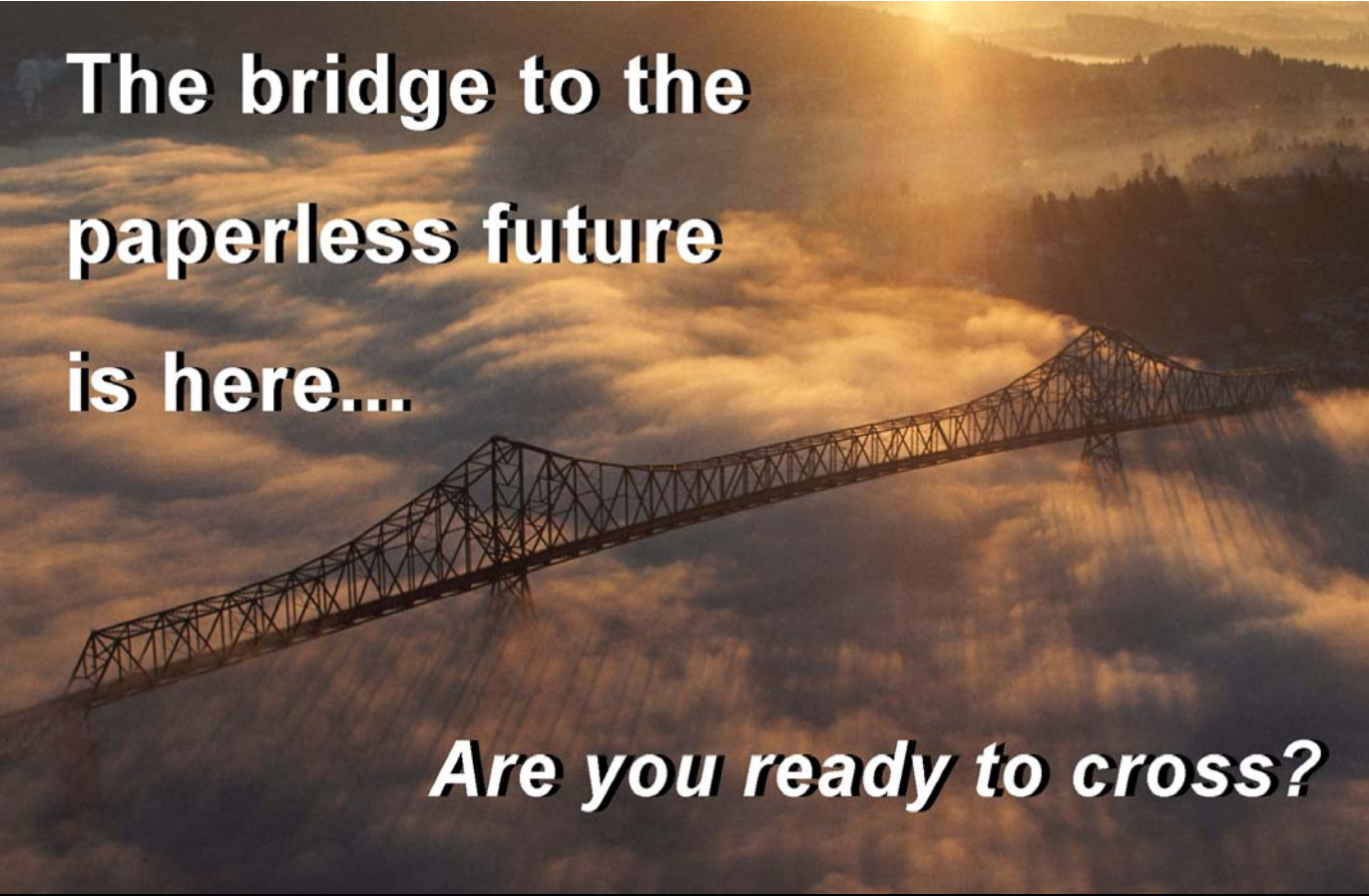
Note: My thanks to Barbara Werelius, Records Manager and Guru at Tacoma Public Utilities for her assistance in the development of this article and also the Puget Sound Chapter of ARMA.

**EDITOR'S NOTE:** If you are in the process of studying to take the CRM Examination and would like some study hints, you may want to try to get to BOISE for this Examination Preparation Workshop.



The Boise Valley Chapter of ARMA, Inc. is hosting a  
**Certified Records Manager (CRM) Examination  
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March 18, 2011 – 8:00 a.m. – 5:00 p.m.



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**OREGON CHAPTER OF ARMA INTERNATIONAL**

**Meeting/Seminar Registration Form**

**Photographic Records  
Dee Wise**

**Tuesday, February 15, 2011  
3:30 p.m.**

**LOCATION:  
David Evans & Associates  
2100 SW River Parkway  
Portland, OR 97201**

**Click on <http://www.oregonarma.org/meeting.php?ID=135>**

**Cost: \$10 for Members; \$15 for Non-Members**

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Email: [crd@inicigroup.com](mailto:crd@inicigroup.com)**

**Or Mail form to:  
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P O Box 40004  
Portland, OR 97240**

**Name:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Company Name:** \_\_\_\_\_

**Name(s) of Guests(s)** \_\_\_\_\_

**REGISTRATION DEADLINE:**

**Reservations required by February 11, 2011**

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