



September 2011  
Volume 43, Issue No. 1

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

## EXPLANATION OF G.A.R.P.<sup>®</sup> Genifer Graff

**Date:** Tuesday, September 13, 2011  
**Time:** 12:00—2:00 p.m.  
**Location:** Ernesto's Restaurant  
8544 SW Apple Way  
Portland, OR  
(One block east of Jesuit High School)

**Cost:** \$20 members; \$25 non-members

**Program Description:** Records managers strive to implement sound records policies and procedures ensuring protection of information assets as well as defensible disposal of those assets when retention has been achieved. As such, many records managers are looking for best practices and sound advice. To assist records managers, ARMA provides a model called Generally Accepted Recordkeeping Principles (GARP<sup>®</sup>) that provide records management professionals in designing comprehensive and effective records and information management programs. GARP<sup>®</sup> allows an organization to assess how mature are its record keeping practices and provides a road map to achieve effective Information Governance.

In this session, the GARP<sup>®</sup> Maturity Model for Information Governance will be introduced to paint a more complete picture of what effective information governance looks like. We will introduce the eight principles and discuss how to move from Level 1 to Level 5 in maturity.

We will also be introducing the Information Governance Reference Model as part the eDiscovery Reference Model (edrm.net) and how GARP<sup>®</sup>



*Continued on next page*

Oregon ARMA  
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Portland, OR 97240-0004

[www.oregonarma.org](http://www.oregonarma.org)

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and IGRM work together to help records managers educate legal about sound and effective information governance programs.

**Speaker Bio:** Genifer Graff is currently employed at IBM where she is a Senior Executive Consultant specializing in Compliance and eDiscovery solutions. She has an extensive background in records management, eDiscovery and automated document capture.

Genifer has a background in records management, compliance and eDiscovery. She is a member of ARMA and has attended meetings and Expos for many years. She has completed the requirements to receive the AIIM ERM Master certificate. She has also worked with many different organizations to install and implement records management solutions and continues to expand her records management education by attending webinars, conferences and reading records and classification related literature.

Genifer is also actively involved in AIIM – The ECM Association and has attended the AIIM Conference and Expo for over 10 years. She recently served on the AIIM Professional Advisory Committee (PAC) and also serves on a standards committee. She has held several positions with the local AIIM chapter including president, vice-president, program chair and newsletter editor.

Genifer has attended numerous local AIIM and ARMA events and is a sought-after speaker on Capture, BPM and Records Management. Genifer has spoken at many local FileNet UserNets, AIIM meetings, ARMA conferences and at several Government Management Information Sciences (GMIS) Conferences.



*Genifer Graff*

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## ARMA ADVENTURES

### TYRENE BADA, PRESIDENT



#### An Introduction

I almost failed high school. My GPA my first term in college was 1.80 - resulting in Academic Probation. I had lost faith in my scholastic abilities, and had no aspirations for any kind of a career. Since then, I have grown professionally by leaps and bounds, and will soon have my Master's of Library of Science degree with a certificate in Archives Studies.

How did my life take such a drastically different direction?

I was lucky, blessed, and fortunate to have incredible mentors. They would point me in the right direction, and wouldn't be afraid to tell me if I happened to veer off-course. They encouraged and believed in me. And, most importantly, they taught me how to believe in myself.

I had a feeling of deja-vu of my high school and college days shortly after I began working at Portland Community College four years ago. I was in a completely new position, and so I had to "make things up" as I went. Enthusiasm was high my first year. However, that spirit waned as I became overwhelmed with the scope of my job, and the 1500 square mile area that PCC covers. How could I do it? And how could I do it without a budget, and without a staff? How could I possibly store the records of the largest educational institution in the state into less than 900 square feet?

Enter ARMA. My boss, who has become another fantastic mentor, suggested I become a member of ARMA shortly after I was hired. I was very shy as I attended my first chapter meeting. I was surrounded by seasoned professionals, and I hadn't even taken a proper inventory of the PCC Records Center. Again, I was lucky, blessed, and fortunate to have Tim Hunt, who was Chapter President at the time, approach me, and introduce himself. He was very friendly, and I didn't feel intimidated by him or his CRM status. As I went to more meetings, Tim would seek me out and chat with me. After the Great Northwest Region Conference in 2008, I wanted to serve on the board with Tim and the rest of the welcoming board members.

It has been an utter joy to be on the board these past few years. I have learned so much from my fellow board members. The chapter presidents with which I have worked have been particularly influential: Tim Hunt welcomed me into ARMA; Cheryl Dorman shaped my experiences in ARMA, and has been very supportive in my transition into my new role. Now I am Chapter President, and have the opportunity to approach the new members, introduce myself, and to make them feel comfortable.

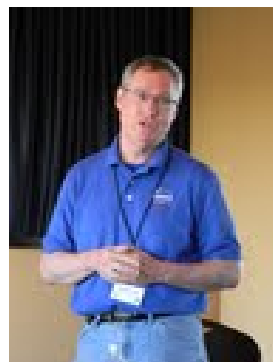
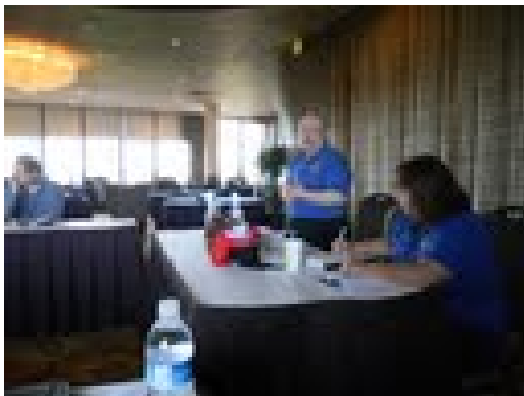
I may be President, but this does not mean I can stop learning and growing professionally. There is still so much I need to learn, and there is no better place to learn than ARMA. I look forward to the challenges of the upcoming year.

# THE GRRREAT NORTHWEST REGION LEADERSHIP CONFERENCE WAS GRRREAT!

**TYRENE BADA, PRESIDENT**

The Oregon Chapter hosted the annual conference at the Red Lion Hotel in Northeast Portland on June 3-4, 2011. We welcomed ARMA International's Director of Member Services Trevor Mitchell, and President-Elect Komal Gulich, CRM. Komal gave a presentation about the role of the ARMA International Board of Directors, and Trevor talked about resources from ARMA HQ and tips for chapter management. Dale Mask conducted the afternoon training. The focus was "How to increase membership, How to motivate members to volunteer, and Avoiding "Board Burnout."

## *Leadership Session photos*



While the purpose of leadership is professional development, the evening events will be well-remembered. Friday night was all about a fundraiser for cancer research. Marc Simpson, Dave McDermott, and Bruce Walters donated their heads to the chapters who raised the most money. The winning chapter was Puget Sound. Their representative, Ember D. Krumwied, CRM, had the honor of shaving the head of our Region Manager, Marc Simpson. In second place was the Oregon Chapter, and Tyrene Bada had a lot of fun shaving the head of Dave McDermott, President of the Boise Chapter. Dave's chapter came in third place, and he relished

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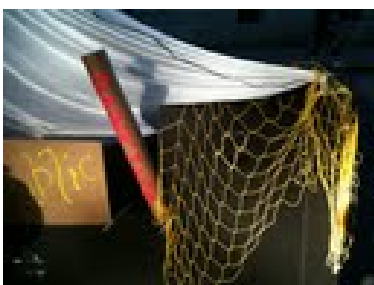
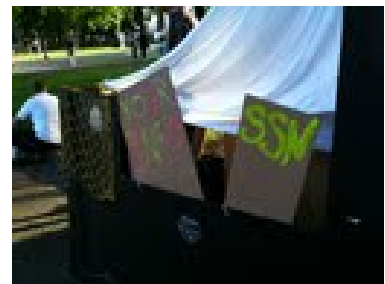
shaving the hair off the head of Bruce Walters, Immediate Past President for the Boise Chapter.

**Cancer Research fundraiser results**



The fun did not end there. Saturday night, conference attendees marched in Portland's annual Starlight Parade (Part of the Portland Rose Festival)! The theme was all about information piracy. Participants dressed either as pirates (who were trying to steal information) or "land-lubbers" (who were keeping information safe). Oregon ARMA partnered with Iron Mountain, who also joined in the fun. The "SS ARMA" sailed the entire parade route proudly.

**Starlight Parade Entry—SS ARMA**





MEMBERS ONLY

**DEE WISE, MEMBERSHIP DIRECTOR**

Hello Oregon ARMA members! Here is the membership update for September 2011:

Welcome our newest members!:

Kelsey Dietrick, Records Specialist, Tualatin Valley Fire & Rescue

Julee Howard, Human Resources Specialist, Washington County

Rodney Lee Simmons, Associate, Judith Read Writing

Josh Lattin, AccuScan NW & AccuShare NW Divisions Manager, Accu NW

Gordon Andersen, Enterprise Process  
Manager, Tillamook County  
Creamery Association

Judy Read, Adjunct Instructor, Port-  
land Community College

Yvonne P Behrens, Records Manager,  
Clackamas River Water

Congratulations to Oregon ARMA mem-  
bers celebrating their years of member-  
ship:

30+ Years: Sue Nelson

20+ Years: Dwight Wallis, CRM  
Jeffrie Riha

15 Years: Nathan Bartholomew  
Karole Kellam  
Dee Wise

5 Years: Charlie Killian



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W W W . t a b . c o m

Newsletter Editor—Jane McGarvin

Tyrene Bada, Chapter President

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# CHECK IT OUT

## KIMBERLY WOLLENBURG DIRECTOR OF EDUCATION



No Picture Available  
of Cover

### Privacy Nation: The Business of Managing Private Information and Documents

Randolph A. Kahn, Esq., Daniel J. Goldstein, Esq. and  
Barclay T. Blair  
ISBN: 0-8925B-411-4  
Published 2006

Privacy is every organization’s problem. Managing privacy in today’s business environment requires a concerted effort from all employees. The failure of a single employee to safeguard private information could leave an organization facing serious criminal or civil liability. Avoiding government investigations and costly lawsuits requires more than the effort of one individual; your whole organization must formulate and execute a plan. *Privacy Nation* is a desktop reference for any individual in business or government whose job responsibilities include managing private information. It is a book about Privacy Information Management (PIM) – the manner in which businesses, government, and other entities should collect, maintain, and use personal information. *Privacy Nation* provides practical solutions that enable organizations to take control of their private information in a way that serves both business and legal needs.

Many books about privacy are designed to help consumers understand their privacy rights. Other privacy books are written for lawyers specializing in privacy law and its related issues. While *Privacy Nation* contains information that may have value to consumers and lawyers, the primary focus of this book is on helping business people and managers understand the impact of privacy issues on their business.

*Privacy Nation* will help you – the business person or manager – understand how privacy impacts your organization today. *Privacy Nation* provides practical solutions that will help you understand how to manage the private information you collect in a manner that complies with the law, addresses your customer’s demands and protects your organization.

\*\*\*\*\*

Library materials are available for loan to ARMA Oregon members. Take advantage of this valuable resource at: <http://www.oregonarma.org/library.php>.

*I'm still shopping! If there are any resources you'd like to see added to the library, please feel free to email me at [kwollenburg@co.clackamas.or.us](mailto:kwollenburg@co.clackamas.or.us)*

## MAY CHAPTER MEETING RECAP ANNUAL MEETING

**JANE MCGARVIN, NEWSLETTER DIRECTOR  
WITH CONTRIBUTIONS BY  
TYRENE BADA, PRESIDENT; AND  
CHERYL DORMAN, INTERMEDIATE PAST PRESIDENT**



The Oregon ARMA Chapter held its annual “Hats Off” lunch on Tuesday, May 9, at Iron Mountain’s offices, where the out-going officers were recognized, and the newly elected officers were sworn in. Iron Mountain donated the lunch.

The officers going off the board included: Bruce Schinkelwitz, Vice President of Programs; TraciLyn Ryzewski, Vice-President of Facilities; Karen S. Green, CRM, Education Director (Karen retired in December, 2010 and had been replaced by Kim Wollenburg); Kim Akimoto, Membership Director; and Tim Hunt, CRM, Immediate Past President. Each current and newly elected officer related how ARMA has impacted them.



Board members transitioning on the Board included Cheryl Dorman, Immediate Past President from President; Debbie Baidenmann, Vice President of Facilities from Secretary; Tyrene Bada, President from Webmaster Director. Also returning in their present positions included: Dwight D. Wallis, CRM, as Treasurer; Jane McGarvin as Newsletter Director; and Kim Wollenburg as Education Director.

*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 ..... \$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: [jmgarvin@ci.oswego.or.us](mailto:jmgarvin@ci.oswego.or.us)

Newly elected members on the Board included: John Littler and Alan Smith, Co-Vice President of Programs; Jennifer Mundy as Webmaster Director; Kris Keifer, Membership Director; and Frank Milton, Oregon Program Liaison.

President Dorman administered the oath of office to the Board members who were present.

President Dorman announced the recipient of the Chapter Member of the Year is Tim Hunt.

“Tim supported the chapter by attending chapter meetings, greeting new people, volunteering to step in when someone was missing and even making suggestions on topics for our meetings. Tim worked hard this last year participating in many events outside the normal Chapter meetings, like the Starlight Parade, and played a big part in putting that together. He kept up with all chapter activities, and completed the Chapter of the Year application. Tim has served on the Board for many years, and is now the current Great Northwest Region Treasurer.”



*Tim Hunt, CRM  
Chapter Member of the Year*

Last year's recipient of the Chapter Leader of the Year Tyrene Bada announced that Cheryl Dorman was the recipient of the 2010-11 Chapter Leader of the Year.

“Cheryl has done many great things for the chapter. Her boundless energy and enthusiasm motivated everyone, and she represented the Chapter well with her professional attitude and graciousness. However, her efforts in the Chapter's participation in the Starlight Parade were extraordinary. She went above and beyond in leading not only the Chapter, but others from the Great Northwest Region and ARMA International in one of the most memorable events in the Chapter's history.”



*Cheryl Dorman  
Chapter Leader of the Year*

Both Tim and Cheryl received plaques and their registration paid by the Chapter to the ARMA International Conference in Washington, DC that is being held in October.

Following the lunch, the short Hat's Off program, and the officer installation, Josh Butler and other Iron Mountain staff provided a tour of their file storage facilities to interested members.

Congratulations to the new Chapter leaders!

## **READY TO CRAWL THROUGH HISTORY AGAIN (OR FOR THE FIRST TIME)?**

**JENNIFER MUNDY, EDUCATION DIRECTOR**

Everyone is invited to the 2nd Annual Oregon Archives Crawl on Saturday, October 15. Start at any of the four host locations (Portland Archives and Records Center, the Portland State University Millar Library, Multnomah County Central Library or the Oregon Historical Society) and get ready to dive head first into history. Each host site will share space with other local archives and heritage organizations, many returning and a few new ones.

Some of this year's participating organizations include Oregon Health and Sciences University, the Genealogical Forum of Oregon Library, Oregon Nikkei Center, the Multnomah County Records Program and the Dill Pickle Club. With over 30 organizations as part of the Archives Crawl, there is something for everyone!

Crawlers can tour some of the facilities and get a glimpse of where all these treasures are stored, see how Portland has changed over the years through photos and maps, and touch artifacts ranging from police dockets dating back to the late 1800s to medical artifacts from OHSU (maybe even a skull). Join in on fun family activities that connect you to our rich history and learn how and where to do your own research. Remember: you don't have to be a history scholar to be interested in history, or to do research! All of the participating archives are open to anyone with an interest in history.

As you crawl from site to site, make sure you get your free "passport" stamped at each location. A fully stamped passport gets you into a drawing for items donated by participating archives. The drawing takes place at the After Party at McMenamins' Mission Theater. The After Party is just that, a party where we can all kick back, listen to music, reflect on the day's events and chat with the archivists and other people who like history. The After Party is free to everyone, but be sure to bring your money if you want to partake of McMenamins' food and beer. Root beer will be available for free until it runs out.

**Second Annual Oregon Archives Crawl  
Saturday, October 15  
10:00 AM to 3:00 PM  
Free and Open to the Public**

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

**The After Party at the McMenamins' Mission Theater & Pub  
Saturday, October 15, 3:30 PM to 6:00 PM  
Open to the Public/No Host Bar  
Enjoy fun, music, and prizes!**

**For more information, check out our website: [pdxarchivists.wordpress.com](http://pdxarchivists.wordpress.com)**



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## Message from the Great Northwest Region

Hello Great Northwest Region Members! Welcome to another ARMA year!

Last June the GNW Region and Chapter leaders met in Portland, Oregon, for the annual GNW Leadership Conference. Based on the ideas, sharing and planning from that meeting, I'd have to say this year is sure to be one of our best.

The first great idea that came up was a region-wide mentorship program. A number of members have voiced a desire for such a program. It's making the connection to the right mentor that can be difficult. Sometimes the right mentor for you may be a member of a different chapter. So a region wide program makes sense. With the plates of the members of the Region Team already overflowing, the question was who would oversee the program. Then Jenny Winkler and I remembered that the position of Director of Marketing and Membership was still vacant. What a perfect place for this program. After a last call for interested parties and a consultation with the Region Team, we found the right person for the job.

Members of the Great Northwest Region, it is with pleasure that I announce to you that Peggy Striefel of the Columbia Basin Chapter has been appointed as Director of Marketing and Membership for the Great Northwest Region of ARMA. Peggy has been a member of ARMA for eight years. She has served in the Columbia Basin Chapter in several capacities including: Director of the Board, Vice-President, and President. She is currently the Immediate Past President of the chapter. During her service, Peggy was honored by Columbia Basin members as their 2010 Leader of the Year. She has already hit the ground running in her new region duties and is certain to be as successful on the region level as she has been in her chapter. Welcome to the Region Team, Peggy!

The second great idea that came out of Leadership was something called "The ARMA Ball of Goodness". A concept of Oregon Chapter President Tyrene Bada, the Ball of Goodness refers to the feeling of respect, camaraderie, and cohesiveness of the leadership of the region. Truthfully, it is a feeling I have found among all of our members in visiting every one of our chapters. ARMA is a family and nowhere is that exemplified more than here in the GNW Region. The name, "the ARMA Ball of Goodness" just sounded too good not to use. So after a discussion with members of the Region Team, we came up with the following:

This year, the region would like to highlight some of the outstanding accomplishments of our chapters. The GNW ARMA Ball of Goodness will be a monthly award to one chapter. The chapter may have had an exceptional turnout to a monthly meeting, had a member or members receive their CRM designation, completed a special project, received a speaker grant, etc. All chapters need to do is submit their entries to me no later than the first of each month. The Region Team will announce the monthly winner in our region messages each month and a prize, i.e. a GNW Region Ball of Goodness, will be sent to the winning chapter.

In thinking through the Ball of Goodness idea, we found our theme for the year. "Who Done It?" We want to know. There will be more on that in coming months. So send your entries in and a Ball of Goodness may be coming your way.

Mark a couple of special events on your calendars now! The 56<sup>th</sup> ARMA International Conference and Expo will be in Washington, DC, from October 17 to 19. Check out the Conference details at [www.arma.org](http://www.arma.org).

## Access the Right Solutions



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## ASK THE CRM

**BOB DALTON, CRM**

**Question asked by a client:** *I would like to develop a database to manage my department records. Do you have any suggestions?*

**Response:** This is a question I have been asked many times over the years by clients and by students in a class that I taught at a local college. This isn't an uncommon question from people working in small to medium-sized organizations that do not have a formal records management program. There are three parts to the response.

(NOTE: Part 1 will be answered in this Newsletter; Part 2 and 3 will be in future Newsletters).

One of the questions I would ask would be, "do you need an index?" My answer is: "Depending on the complexity and/or the type of the records system you have developed." There are two types of collections:

- 1) A "direct access system" that allows one to go directly to the files without the need of an index. Geographical and client records filed in order are an example of a "direct access system."
- 2) An "indirect filing system" or alpha-numeric system is based on a special filing code. In either case, an index of some sort may be necessary to locate and retrieve files. Photograph files and engineering drawing systems are examples of records that may require an index.

I have observed a wide variety of indexing schemes using simple tools like Microsoft Word, Excel, Access, SharePoint and the more formal records management programs developed by commercial firms to manage corporate records. Each (Microsoft Word, Excel, Access, SharePoint, etc.) may be utilized to develop an indexing scheme. It all depends on what you expect of the index; i.e., the amount and/or complexity of detail required and the retrieval needs of the users of the records.

For those interested in a more robust document management program the following government web site "<http://jitic.fhu.disa.mil/recmgt/index.htm>" contains a listing of commercial vendors who have developed document management programs and have become certified under DoD Standard 5015-02. The site is the Joint Interoperability Test Command (JITC) Records Management Application (RMA) organization. The JITC performs testing of RMA products for compliance with Department of Defense (DoD) 5015.02-STD. It is (DoD) policy that only compliant products be acquired by DoD organizations. Products that have been successfully tested are listed in the compliant Product Register. It is noted that there are other products on the market that are not certified that may be acquired to management an organizations business records.

For organizations without the funding resources:

- You may easily develop a table in Microsoft Word that has a file code or numbering scheme, titles, authors and dates. You may use the Edit/Find button to locate records within the search parameter. Microsoft Word could be a simple solution for a small collection.
- Microsoft Excel may also be used quite effectively in managing collections of files. It also has

*(continued on next page)*

some other attributes for indexing, sorting, data entry input and printing of indexes that are lacking in Microsoft Word.

- For organizations that may have the need for a more complex system or multiple systems to manage their records and are unable to secure funding for one of the professionally developed vendor document management system I recommend evaluating Microsoft Access. If Microsoft Office is the organizations software standard and the agreement includes Microsoft Access as part of the software package, you may have hit a mini jackpot The bigger jackpot would be if the Information Services/Technology Department also had the technical staff with experience working with Access and provide support in developing the program and on-going support for the maintenance of the software.

If the Information Services/Technology staff cannot support you by assisting in the development of a filing system, but is willing to manage the software (maintenance, upgrades, backups, etc.), and you still want to pursue the development of a system, ask yourself the following questions:

1. Do I have the computer skills to proceed with this project?
2. Do I have the time to develop a system?

If the answer is yes to both questions, you are on your way to starting the development of a system.

Bob Dalton, CRM

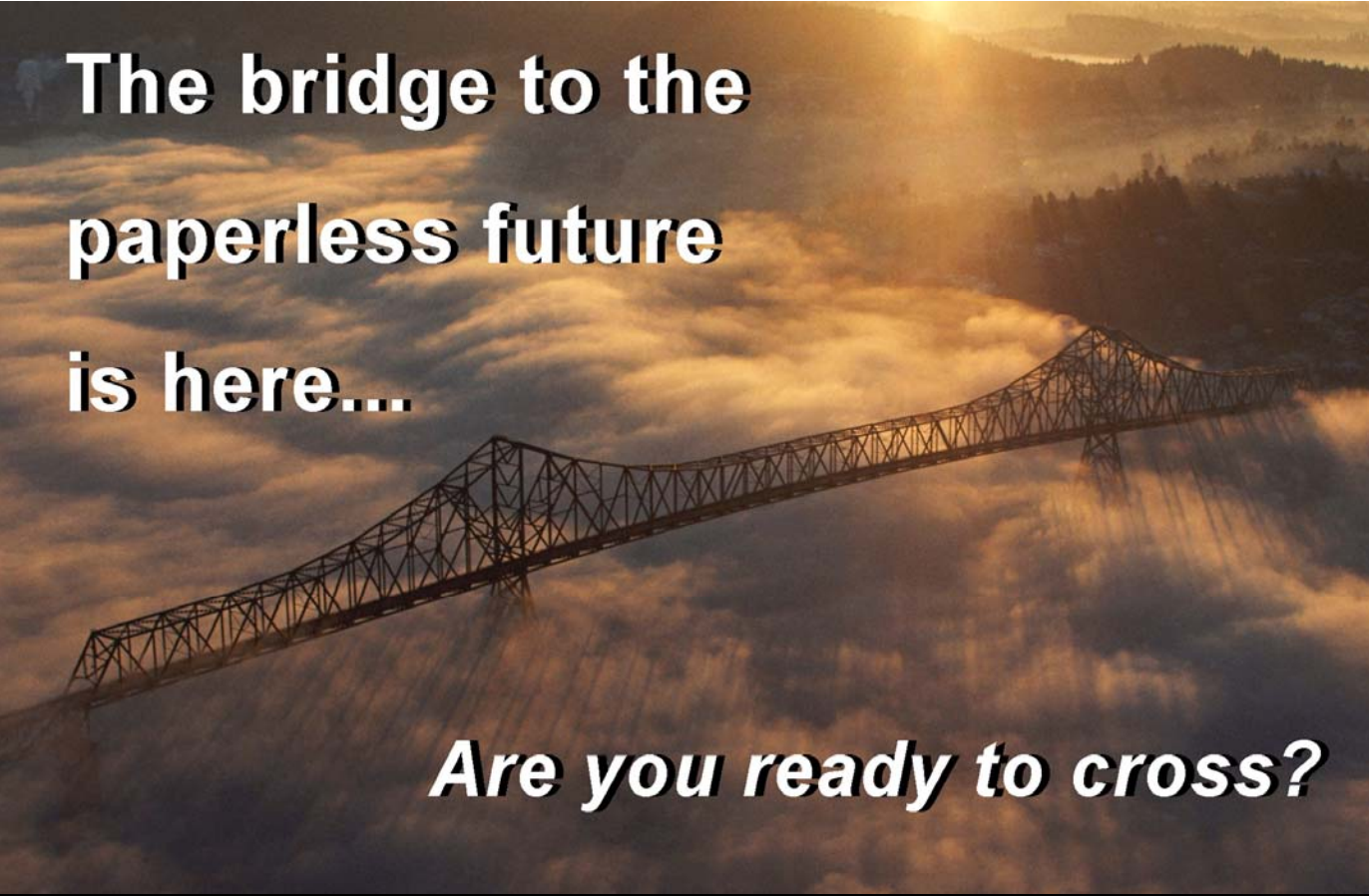
## **ARMA OREGON FISCAL YEAR 2012 BUDGET APPROVED DWIGHT D. WALLIS, CRM OREGON ARMA TREASURER**

The ARMA Oregon Chapter's annual budget was approved by the Chapter's Board of Director's on August 3, 2011. Covering the fiscal year beginning on July 1, 2011 and extending through June 30, 2012, the budget takes a balanced approach, anticipating revenues of \$5981.56 and expenditures of the same amount.

As Treasurer of your chapter, I prepare the draft budget each year based on the previous year's revenues. I then propose an expenditure budget that matches those anticipated revenues. That budget starts with certain required expenditures, such as annual corporation fees, post office box maintenance, website maintenance and Chapter Member of the Year annual conference registration fees, then allocates the remaining available funds to support for meetings, library acquisitions, and other services of benefit to the membership.

Our Chapter also donates to worthy causes, including the ARMA International Education Fund (AIEF), a donation that is made in name of the speakers at our Chapter meetings. We will be donating \$350 this year to the AIEF in appreciation of the 14 speakers we had in the previous fiscal year. We can also be proud of the food we donated to the Oregon Food Bank last year, as well as \$145 we raised during our holiday celebration. The budget anticipates a similar donation this year.

As of June 30, 2011, your chapter had \$14,810.32 in its savings and checking accounts. I will be available at our first chapter meeting in September to answer any questions you might have regarding the budget. You can also email me with questions at [dwight.d.wallis@multco.us](mailto:dwight.d.wallis@multco.us).

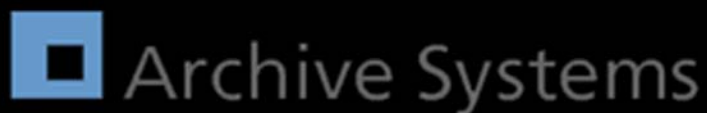


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**OREGON CHAPTER OF ARMA INTERNATIONAL**

**Meeting/Seminar Registration Form**

**Explanation of C.A.R.P.®  
Genifer Graff**

**Tuesday, September 13, 2011  
12:00 to 2:00 p.m.**

**LOCATION:**

**ERNESTO's  
8544 SW Apple Way  
Portland, OR**

**Click on <http://www.oregonarma.org/meeting.php?ID=145>**

**Cost: \$20 Members; \$25 Non-Members**

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

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

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

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

**REGISTRATION DEADLINE:**

**Reservations required by September 9, 2011**

**Oregon ARMA**  
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