



# FOR THE RECORD

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## Welcome from the President

Jacque Challman, OCARMA President



Hello! Welcome to the 2003-2004 year for the Orange County Chapter of ARMA International!

This is my first installment of the president's reports for OCARMA. Wish me luck and please don't be too hard on me. I am new to the records management field. I have been in the industry for just under two years. My mother, however, has been in the industry forever. My mom is Martha Mayer from Business Data Records in Minneapolis, Minnesota. Those of you that have been active within the last 15 years might know her or the name.

Before my mom became involved in RIM, I had never heard of such a thing as RIM. Records Management? You mean you are working for a music company? That's the job I'd always wanted! I was much relieved to find out she did not steal the job I wanted. As a college student I spent part of one summer helping in her warehouse. (After that I was smart enough to always have a predetermined summer job before I got home.) As I got older and my mom progressed in her career I started noticing things. She LOVED her job. She had met some of the neatest people too. She actually got to know people well enough to build friendships. She still has strong friendships with people all over the world. Wow! What a great job!

When I graduated from college I worked for Circuit City Stores. I had various positions within the retail music and buying teams. I traveled 13 states and was transferred all over the country. Whenever my mom was at an ARMA conference near where I was working, I went to visit. I got to meet many of her ARMA friends. What a great group of people! Every one was fun, open to meeting new people and sharing ideas. Many industries have people that seem to be competing with each other and are more self-serving than trying to learn from their peers. I have never found ARMA to be that way. When Circuit City wanted to move me for the eighth time in seven years- to Denver, no less!- I decided to stay in Southern California. And I got a job just like my mom's. And I LOVE it.

Like most ARMA board members, I was cajoled into a board position. Unlike most though, it was on my first day as an ARMA member. I served as Secretary for the 2002-2003 OCARMA board and was again cajoled, this time into the presidency. What a sucker, huh?

[\(Continued on page 2\)](#)

## President's Message (con't)

*(Continued from page 1)*

Please join me the third Tuesday of every month (occasionally other days) for our monthly lunch meeting. I would really like to meet all of you in person. I am trying to call you all and introduce myself, but meeting you in person is a lot more fun.

Our monthly meetings are going to be FUN. We will have a silly game at each meeting and will be tracking the totals for the year. The winning team gets a small prize. This is a great non-confrontational way to meet others- not like the some of the lame introductory games that we all hate.

This year we are adding workshops. Our first one is the third Tuesday in November. Les Bossert will be providing a hands on workshop on Disaster Recovery. Come join us the morning of Tuesday, November 18<sup>th</sup>. Get your hands dirty, pull paper out of water and learn how to clean and revitalize it- make it good as new!

I hope your experience with ARMA this year is as educational and fun as you'd like it to be. Please remember, you only get out of it, what you put into it. We are always looking for volunteers for committees and board positions. If you have ANY time to help, let us know!

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## The Great Cat Experiment

Lorinda Kasten-Lowerre, OCARMA Board Secretary

The problem was an intermittent foul odor in the Record Center of a savings and loan, where I used to work. It was a tilt-up construction warehouse-type building in an industrial park. The curmudgeonly Facilities Manager, a smoker, would grudgingly respond to our reports, smell nothing and depart. He thought we were smelling things.

The hotter the weather, the worse the smell. We brainstormed and decided the problem was dead rodents in the walls. One of us had access to three cats who were proven rodent killers. So she brought the cats, and accessories, to work. We figured that even if they didn't kill anything, their presence would scare the rodents into relocating.

One cat took off for the back of the warehouse, and was the subject of an active search all day. One cat plopped down in a comfortable place near the worker that brought it and didn't move all day. The third cat was seen intermittently throughout the day. None of them were seen near the location of the strongest odor. They didn't catch any rodents. We had to put food out to lure the scatted cat into its carrier.

The odor diminished, eventually, but the Record Center was relocated later to the basement of the headquarters building.





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# The Strategic Planning Process

Nolene Sherman, Newsletter Editor

The OCARMA Board met on July 19<sup>th</sup> to review how we have performed for the past year and to create our strategic plan for 2003-2004. Present was: Jacque Challman, President; Linda Masquefa, Immediate Past President; Penny Kyle, Vice-President and Director of Hospitality; Ron Smith, Treasurer; Lorinda Kasten-Lowerre, Board Secretary; Julie Folcik, Director of Government Relations; Dale Anesi, Director of Membership; Juanita Skillman, Historian; Cathy Westfeldt, CRM Liaison; Nolene Sherman, Webmaster and Newsletter Editor; and two guests, Warren Chao and Alex Wong from Ventus. Rick Weinholdt of Gandra Consulting, a past president of ARMA International and current member of ARMA International Board of Directors, served as our facilitator.

We looked at our Chapter's strengths and weaknesses, and identified any opportunities for and threats to our organization. We also identified the programs and services we offer to our members and evaluated whether they should be kept "as is," should be kept with improvements or should be abandoned (we determined that none should be abandoned). We then brainstormed ideas - taking advantage of our opportunities and strengths - to mitigate our weaknesses and make the improvements to the programs and services that we desired. From this we grouped ideas into categories, deciding which were the most important or desirable (marked by ☺'s), and developed specific goals. Each goal was assigned to a person who would be responsible for ensuring that we are progressing toward the goals, by handling specific tasks themselves and by delegating tasks and tracking that person's progress.

Since providing good educational meetings was a key portion of our plan, we also spent time discussing possible meeting topics and formats (meeting vs. seminar or workshop), possible speakers and setting tentative dates and times.



Facilitator Rick Weinholdt, helps us focus in on the goals for our chapter

\*\*\*\*\*

## BRAINSTORMING

### STRENGTHS:

- We have members who are computer "techies"
- Our board has the ability to be flexible
- There are many great personalities on our board
- Our members represent depth and breadth of experience in the profession

[\(Continued on page 5\)](#)

## Process (con't)

*(Continued from page 4)*

Our board has a commitment to the profession and to ARMA

Our board cares about its members

We have "new blood" willing to serve on our board

We are financially strong

We have a board who tries to involve all members

Our board and our members are fun people to be with

Our chapter has members from a variety of industries

Our board maintains constant contact with membership through newsletters, meeting notices and meetings held both during the day and in the evenings

Our board exhibits good management in planning, finances and programs

Our chapter has tight connections to ARMA International headquarters and regional leadership

Our board has connections with many good speakers

We have a large membership

Our board has a willingness to try something new

We have multiple CRM's within our membership

We have a Chapter leadership that works well together

We get support from our vendor-members

Our Chapter focuses on education

We have a strong core of past leaders who are still around to support new board and members



Jacquie, our "Fearless Leader," doing her best to rally the troops.

### WEAKNESSES:

We need more general membership involvement at meetings and in volunteer activities

There is general member apathy in our Chapter

We have no organized membership campaign

Our educational meetings need to be more "how to"

We have been unable to identify/market to OC RIM professionals

The Chapter is declining in value to vendor-members

OCARMA has no presence in local educational institutions

We don't know our membership's needs and interests

We do not have many legal/law firm members

We lack public visibility

We have weak connection to OC businesses

We need more events other than meetings i.e. fundraising, group socializing

We have a small membership for the size of this county

We have a low level of Governmental participation

We don't promote the advantage of getting CRM enough

We have little interaction with other nearby chapters

*(Continued on page 6)*

## Process (con't)

[\(Continued from page 5\)](#)

### OPPORTUNITIES:

- There is an increased level of awareness of RM in IT community
- We can increase the connection or visibility to Government agencies
- There are new opportunities because of HIPAA, Sarbanes-Oxley, and privacy legislation
- We can make presentations at non-RM professional organizations
- There are many free advertising resources
- We can offer seminars on RM
- We can become more involved in /regional activities
- We could have more board involvement on ARMA Intl committees
- The GLA president wants to do joint meetings
- There are "tons" of potential members I our area
- We could identify more community RIM projects
- We can connect with Archivists
- We can capitalize on the fact that Microsoft now talks about document management
- We can collaborate with software developers to address RIM issues
- We can create a basic RIM college or ROP course
- We can get involved in Long Beach International Conference 2004



Nolene & Julie write down ideas during the brainstorming session

### THREATS:

- We compete with other Southern California chapters for available speakers and potential members
- It is hard to sell soft dollar savings from RIM to companies
- RIM departments are being eliminated or merged into IT
- Many companies have decreased budgets, which threaten RIM departments or personnel
- Membership has many other demands for their time and attention
- Layoffs due to weak economy are hitting the RIM profession
- Fear of co-opting by vendors
- Lack of member participation is threatening vendor involvement (no value to participate)
- The Government!
- There is less company support for associations
- The importance of traditional chapters is declining
- The average person can get information from the internet and listservs and may not feel the need to join associations

\*\*\*\*\*

[\(Continued on page 7\)](#)

***The OCARMA Board of Directors wishes to extend a sincere THANKS to Dale Anesi for his outstanding service to the Board. We wish him the best of luck in his new job — in North Carolina!***

## Process (con't)

*(Continued from page 6)*

### CATEGORIES:

- ☺ - Ranked as an item that a participant wished to be accomplished in the following year
- ✓ - Chosen as a goal

#### CHAPTER VISION

- ✓ Chapter of the Year (COTY) ☺☺☺☺

#### MARKETING

Speakers Bureau - create standard presentations that can be used

- ✓ Create a brochure for a mass mailing ☺☺☺
- ✓ Identify RIM practitioners in OC and make sure they know about OCARMA ☺☺☺
- ✓ Take advantage of PR opportunities ☺☺☺☺☺
- ✓ Participate in Power One (membership drive) ☺
- ✓ More active/advance participation in PIP Day ☺☺☺

Target two industries for strategic marketing ☺

- ✓ Take advantage of free marketing resources

Make presentations at non-RIM professional organizations to increase visibility ☺



Linda & Lorinda trying to decide which ideas will get their vote.

#### PROGRAM DEVELOPMENT

RIM Olympics

Have some of our board members present workshop

Rather than set meeting day, have rotating meeting days

Do some joint meetings with other local ARMA chapters

Do a seminar with a certificate every other month ☺

- ✓ Develop a workshop on one aspect of RIM that we can take out to the community ☺☺☺☺

- ✓ Seminars on records management ☺☺☺☺☺

Presentations on HIPAA, Sarbanes-Oxley, Privacy ☺

#### OUTREACH

Chapter interaction with more ARMA International people

Work with / get a sister chapter (in another state or region)

- ✓ Participation in LINC program ☺☺☺

- ✓ Participate with other local chapters (GLA wants to do joint event) ☺☺☺

Connect with Archivists

Take advantage of increased level of awareness of RIM in IT community

*(Continued on page 8)*

## Process (con't)

*(Continued from page 7)*

Community RIM projects  
Collaborate with software developers on RIM issues  
Increased level of awareness of RIM by IT community  
✓ Long Beach Conference 2004 ☺☺

### MEMBERSHIP INTERACTION

✓ Create a networking list - what industry, what expertise each member has ☺☺☺☺☺☺  
✓ Survey members on what they want/need from us  
Create a mentor program ☺☺  
OC chat room on our website  
✓ Create small committees to help each board member responsibility ☺☺☺

### LONG TERM PROJECTS

More board participation on ARMA International committees  
Create a basic RIM college or ROP course

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## OCARMA Participates in Professional Associations Day

Nolene Sherman

OCARMA has been invited to participate in the San Jose State University School of Library and Information Science Professional Associations Day, sponsored by their student group, Library and Information Science Student to Encourage Networking (LISSTEN).



According to Kerry Spears and Cindy Romero, the LISSTEN Event Chairs, "The purpose of this day is to provide access to various library groups of specific interest to their students. They want to encourage student membership in professional organizations and networking within the profession at the earliest opportunity."

The day is scheduled for Sunday, October 12, 2003 from 1:00 pm to 3:00 pm in room 130 of California State University Fullerton's Pollack Library.

Juanita Skillman will be manning our booth to share with the students the benefits of membership in ARMA International and OCARMA. If you would like to assist Juanita and interact with eager, young, soon-to-be professionals, please contact her at [juanitaskillman@aol.com](mailto:juanitaskillman@aol.com).

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# OCARMA 2003-2004 Strategic Plan

## Objectives

### OCARMA MISSION

- To advance the practice of records and information management as a discipline and profession within Orange County, California;
- To organize and promote programs of research, education, training and networking within that profession;
- To serve our members by:
  - 1) Enhancement of the profession
  - 2) Educational and professional leadership to its members in the form of monthly meetings and seminars, written works and other programs of merit
  - 3) Notification of significant developments in the technical, legislative and professional areas of the RIM profession
  - 4) Cooperative endeavors with other chapters of ARMA and with other related professional groups in the Southern California area

## Goals

### We wish to:

- 1) Maintain or improve the products and services that we deliver to our members,
- 2) Increase membership,
- 3) Increase member participation in chapter meetings,
- 4) Be more aware of political and legal issues relating to RIM so that we may actively promote the expertise of the RIM profession, and
- 5) Increase awareness of records management in general and OCARMA in particular to the business community in Orange County.
- 6) In addition, in recognition of our efforts, we strive to be awarded 2003-2004 Chapter of the Year, Newsletter of the Year and Website of the Year.

## Strategies

Each board member to create their own committees as needed

- 1) Improving Products and Services
  - a. CRM Workshop - continue as an annual event and will be maintained "as-is"
  - b. Website
    - i. Redesign site to be more contemporary, offering more useful content and easier to navigate.
    - ii. Improve awareness of our online meeting registration to members and the public at-large.
    - iii. Job listings on website work well and will be maintained "as-is"
  - c. Newsletter
    - i. Reduce publication to every other month (September, November, January, March and May)
    - ii. Participate in LINC and take advantage of required articles submitted by international participants
    - iii. Each board member to provide at least one article per year

[\*\(Continued on page 11\)\*](#)

## Strategic Plan (con't)

*(Continued from page 10)*

- d. Library
  - i. Implement book sharing program, whereby members will post books they own that they are willing to share with other members, but will expect to be returned.
  - ii. Build library by purchasing one book a month, based on board member recommendation and vote at monthly board meetings
  - iii. Reinforce library as a valuable resource for our members by highlighting a book from our holdings at each chapter meeting and in each newsletter.
- e. Networking
  - i. Participate in LINC program
  - ii. Encourage more member interaction by creating directory indicating each chapter member's industry and area of expertise
- 2) Increase membership by participating in "Power One" membership campaign
- 3) Increase member participation in chapter educational meetings by
  - a. Surveying members to find out what their needs and wants
  - b. Partnering with other local chapters
  - c. Conducting more seminar- or workshop-type meetings
- 4) Create a monthly report summarizing legal issues to be presented to board and published in newsletter. Board will decide if OCARMA wishes to take stand on issue.
- 5) Create awareness of RIM in Orange County by
  - a. Identifying RIM practitioners in OC and make sure they know about OCARMA by creating a brochure to do a mass marketing campaign
  - b. Taking advantage of more free PR opportunities
  - c. Developing RIM presentation to give in the community
  - d. Increasing and improving participation in PIP Day by getting involved earlier in the process
  - e. Participating in 2004 Long Beach Conference
- 6) Submit applications for COTY, NOTY and WOTY

## Measures & Person Responsible

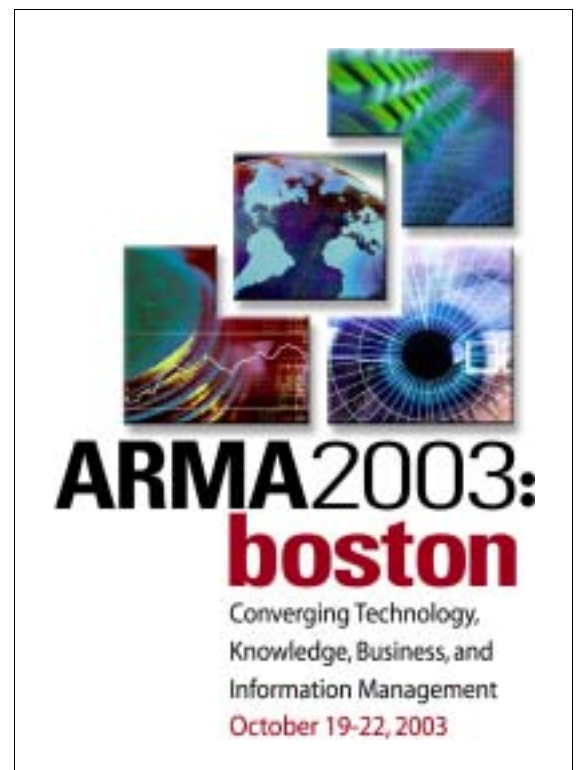
- 1) Improved Products and Services
  - a. CRM Workshop - **Cathy**
    - i. Enrollment of 20
    - ii. Revenue - break even
  - b. Website
    - i. New website uploaded by first meeting - **Nolene**
    - ii. Promotion of online registration for meetings in every meeting announcement sent to members and to outside press. - **Jerry**
    - iii. Regular posting of jobs of interest to OCARMA members - **Lori**
  - c. Newsletter
    - i. Publication of a newsletter by the end of the third week of the month prior to the issue date - **Nolene**
    - ii. One new LINC member and article
    - iii. Submission of articles by board by the second week of the month prior to issue date

*(Continued on page 12)*

## Strategic Plan (con't)

*(Continued from page 11)*

1. Sept - Jacque & Lorinda
  2. Nov - Penny & Dale
  3. Jan - Linda & Cathy
  4. Mar - Juanita & Jerry
  5. May - Julie & Lori
- d. Library
- i. Have list of books members willing to share available to membership by **(date)** - Dale
    1. Dale to recommend one or two books at each board meeting. Everyone welcome to submit titles for consideration. Board will vote to approve funds for one book each month.
  - ii. Director of Education to choose book(s) from library
    1. submit short summary to newsletter for publication by second week of month prior to issue date of newsletter - Dale
    2. Bring a book to each meeting to be displayed under poster or placard - Dale
- e. Networking
- i. Welcome one new LINC member - Board
  - ii. Have networking list available to members by October 3, 2003 - Dale
- 2) Increase membership to 125 members by June 2004 - Dale
  - 3) Increased participation
    - a. Send out member survey by **(date)** and get a **(10%)** response rate - Jacque
    - b. Have a joint GLA/OCARMA Christmas party in lieu of a December meeting - Jacque
    - c. Have at least two of our meetings be workshops or seminars - Board
  - 4) Legislative report - at least a summary of items posted on ARMA International website - given at every board meeting - Julie
  - 5) OC Business Awareness
    - a. Create brochure and complete mass mailing to designated OC businesses and organizations by **(date)** - Cheryl, Jerry & Cathy
    - b. Promote OCARMA in five new publications or other PR outlets - Jerry
    - c. RIM presentation on "Basic Records Management for Non-RIM Professionals" to be ready for use by December 5, 2003 - Linda
    - d. Have one location with high community awareness for PIP Day - Jacque
    - e. Create "Countdown to LB" in each newsletter and on website bimonthly to inform members to upcoming events and involvement opportunities - Linda
  - 6) Awards
    - a. Submit COTY application - Lorinda and Juanita
    - b. Submit NOTY application - Nolene
    - c. Submit WOTY application - Nolene



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## Sample CRM Examination Questions

Excerpted from *Preparation for the CRM Examination: A Handbook* by the ICRM

In anticipation of our CRM Workshop in March, we will be printing a few sample CRM Exam questions in each newsletter. If you can't answer the majority of the questions correctly, you may want to sign up for our seminar!

### PART 1—MANAGEMENT PRINCIPLES AND THE RECORDS MANAGEMENT PROGRAM

1. Defining where the organization is attempting to go and what goals might be achieved is part of the \_\_\_\_\_ function of management?
  - a. Organizing
  - b. Controlling
  - c. Leading
  - d. Directing
  - e. Planning
2. What are the costs involved in a break-even analysis?
  - a. Facilities and random costs
  - b. Forecasted and quantity costs
  - c. Product and employee costs
  - d. Fixed and variable costs
  - e. Planning and labor costs
3. Frederick Herzberg's theory of motivation-hygiene is based on the concept of:
  - a. Need for achievement
  - b. Need for power
  - c. Satisfiers and dissatisfiers
  - d. Job enrichment
  - e. A and b above

### PART 2—RECORDS CREATION AND USE

1. The most appropriate identification (coding) scheme for directives in a large system is:
  - a. A sequence of serially numbered memos and other issuances
  - b. A coding to indication department and Julian date
  - c. An alphabetical sequence based on author or originating office
  - d. A numeric code based on functional classification
  - e. The Dewey Decimal coding system
2. An advantage of the box design in forms is that it:
  - a. Saves space
  - b. Eliminates the left margin
  - c. Reduces the need for multi-part forms
  - d. Costs less
  - e. Allows for larger captions

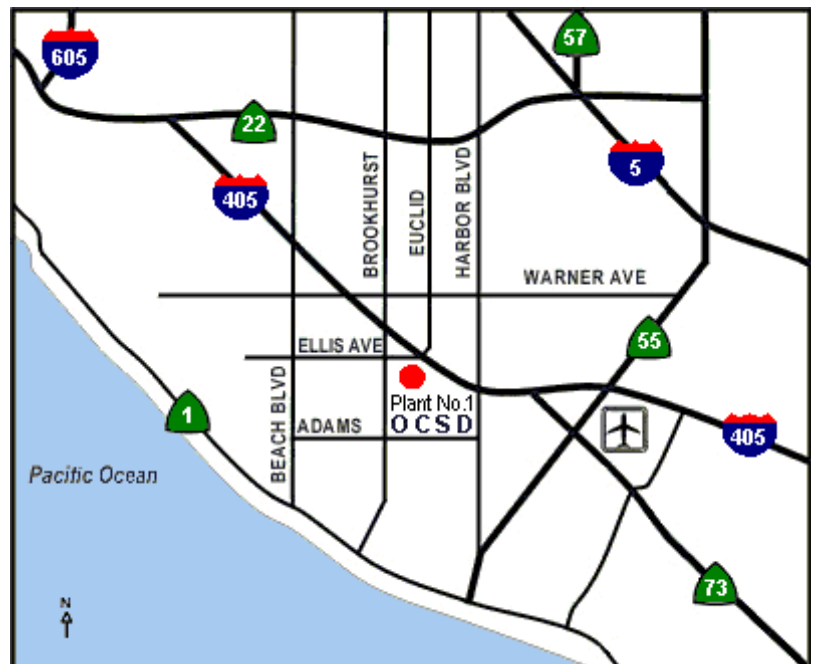
*Answers will appear in the next newsletter!!*

## 2003-2004 OCARMA Monthly Meetings

Date	Time	Tentative Topic	Speaker
August 26, 2003	Lunch	Making Rim Policies That Work!	Helen Streck
September 16, 2003	Lunch	In-Depth Review of ARMA International Website	Melanie Edens
October 28, 2003	Lunch	"ASK An Expert" 3-Minute Roundtable Discussions	Various
November 18, 2003	Workshop	Disaster Recovery	Les Bosser
December 16, 2003	Dinner	Christmas Party with GLA Chapter—Long Beach Harbor Dinner Cruise	
January 20, 2004	Workshop	Electronic Document Management	Jim Coulson
February 19, 2004	Lunch	California Public Records Act	Julie Biggs
March 25, 2004	Dinner	How to Build An Inventory for Electronic and Paper Records	Cheryl Pederson
April 20, 2004	Workshop	Case Study: Imaging, Document Management & Workflow	Susan Fothergill
May 18, 2004	Lunch	Evaluating Offsite Storage	Jim Booth
June 15, 2004	Dinner	Installation, Banquet & Silent Auction	

This is the tentative schedule of meetings for 2003-2004. This list will be updated as topics and speakers are confirmed.

- Lunch Meetings are at 11:30 am; Dinner Meetings are at 5:30 pm.
- All meetings at Orange County Sanitation District, 10844 Ellis, Fountain Valley, unless otherwise noted.
- Notices with more details will be sent to each member before each meeting.



### Orange County ARMA Board of Directors

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Education

\*\*\*\*\* Vacant \*\*\*\*\*

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