



ARMAWAUKEE

Association of Records Managers & Administrators, Inc
Milwaukee Chapter Newsletter

OCTOBER 2002

Presidents Message...

Our year has gotten off to a great start. The program last month, an overview of ARMA International and the services it provides its members, reinforced my commitment to this chapter. ARMA has a lot to offer and it's up to each one of us to take advantage of the educational opportunities presented as well and the networking opportunities. Isn't it refreshing to meet someone within the same industry that faces the same challenges you have, someone that understands your job and someone who will become a resource to you. The Panel of presenters were awe-inspiring.

Alan Andolson presented at the October chapter meeting on "Leadership, Motivation and Career Planning." What a great presentation. He offered insights into how to be a leader, how to motivate and how to plan your career. If you missed this one you missed a great opportunity. Your Chapter Board of Directors is a group of enthusiastic individuals that want to see this chapter grow and become even more vital to its members. Because of their enthusiasm, we've decided to participate in the Memberfest

Mark your calendar today for our upcoming chapter meetings. On November 16, we have

initiative launched at the International.

Conference. Please contact a board member for more information. We've also committed to support the ARMA International Educational Foundation endowment campaign. You should have received information if not please contact a board member or visit ARMA website www.arma.org.

Mark your calendar today for our upcoming chapter meetings. On November 16, we have Janet Nelson presenting "A Hat for Every Occasion" and December 3, our Annual Charity/ Joint meeting with AIIM. Look for more information shortly.

*Patricia Hardy,
President*



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Disclaimer

Contributions or gifts to the Association of Records Management and Administration, Inc. are not deductible as a charitable contribution for U.S. Federal Income Tax purposes.

Editor's Corner....

It's October and time for another newsletter. In this issue, there several articles on the MER Conference attended by Dennis Larsen, CRM and Arlyce Vogel, CRM. The ARMA Conference was at the end of September, and Amy Coughlin, CRM writes about her impressions. There are several Articles on the monthly ARMA Milwaukee Chapter meetings. If you haven't attended one, then you are missing a great opportunity to network and learn. I would like to encourage our members to share information by writing timely articles for this newsletter this year. You can e-mail them to me at <mailto:meusch@earthlink.net>.

Peg Eusch, Editor
ARMAWAUKEE



Chapter Member of the Year:

Congratulations to our Milwaukee Chapter Member of the Year-Sharon Chudy Sharon has been dedicated to our chapter for a number of years and has served on the board of directors in every position. This past year, Sharon working with the Des Plaines River Valley Chapter, planned the Chapters most profitable Spring Seminar. She also planned this year's Great Lakes Leadership Conference held in Milwaukee, and that too was a huge success. Sharon is one of those people that you can always rely upon. Sharon is currently employed as a Records Manager at the Milwaukee Metro Sewerage District, and serves on the Milwaukee Chapter Board of Directors as Program Director.

Congratulations to Sharon MacDonald. Sharon is a member of the Milwaukee Chapter and Des Plaines River Valley Chapter. She was pleasantly surprised at the Great Lakes Champagne Toast in New Orleans to hear that the Des Plaines River Valley Chapter named her Chapter Member of the Year. Sharon is very active in the Pharmaceutical ISG as well as in her chapters. She currently serves as the Publicity Director on the Milwaukee Chapter Board of Directors, and has shared her knowledge of records management by speaking at chapter meetings for both groups. Sharon is employed at Baxter Healthcare Corp as Supervisory, Regulatory Document Publishing & Control.



CONGRATULATIONS

**To Sharon MacDonald, CRM and
Sharon Chudy on Chapter Member of the
Year!**

ARMAWAUKEE OCTOBER 2002
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Milwaukee Chapter in New Orleans



ARMA Milwaukee Chapter Members: Mark LeMahieu, Linda Walker, Steve Webber, Amy Coughlin, CRM, Sharon Chudy, Pat Hardy, and in front Sharon MacDonald, CRM.

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IN THE LOOP WITH LARSEN....

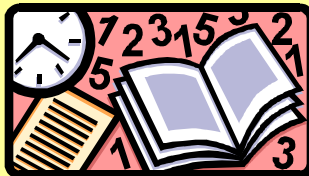
This was my first Managing Electronic Records (MER) Conference, which is held under the auspices of Cohasset Associates Inc., a records management consulting company. Robert Williams, the head of Cohasset is, of course, famous in records management circles for having written the book entitled the Legality of Microfilm. This was foundational work fostering the use of microfilm technology in solving records management problems. When I think of Cohasset's major contributions in the field of records management, I primarily think of it as educational publishing and consulting. The early idea that legal precedent and operational microfilm use would be of great benefit in records management has now lead to the similar effort with respect to electronic records. The legal precedent for handling electronic documents (scanned paper pages, email, spreadsheets, etc.) seems to be the same as for microfilm. The somewhat hidden operational relationship between operational benefits of microfilm and electronic records is something frequently overlooked. The real power managing electronic records is to focus on the time enhancing (therefore dollar enhancing) features. Microfilm has always had the nifty property of making mountains of paper into really little images, therefore saving space. The accompanying enhanced retrieval capability through advanced computer indexing, electronic distribution and general automation is also wonderful, but actually overcoming the walk, the hand motion, the retrieval and the delivery of the document needed, is the real time saving aspect to microfilm and now to electronic records.

The MER Conference makes an excellent effort to bring both the conceptual and academic foundational issues forward. These foundational issues are trickier than many people think. I was amazed to learn that the very foundational studies and standards know as InterPARES and the DOD Standard 5015.2 respectively still do not seem yet to have solved basic records issues. The practical solutions presented at MER quite often in the form of software seems very important especially in light of the need to solve business problems at hand despite the long-term foundational issues, which still need attention. I found dialog with software vendors very interesting and helpful.

If you find that you or your organization is ready to start dealing with **managing electronic records** then the MER Conference is where the action is.

Dennis Larsen, CRM

P.S. Wish Mark LeMahieu and Sue Fisher your best wishes as they pursue the Certified Records Manager (CRM) Exam.



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Everything you wanted to know about ARMA ...

by Patricia Hardy

Our first Chapter meeting this year focused on ARMA and the benefits of being a member of this great organization. Everything you wanted to know about ARMA... and your opportunity to ask happened on September 17, 2002 at Alioto's on Mayfair Road.

We had a panel of speakers all of whom are CRM's and long time members of ARMA. Our distinguished panel of speakers were: Pam Duane, CRM - Senior Records & Information Management Coordinator with Madison Gas and Electric Company, Sharon MacDonald, CRM – Supervisor of regulatory Document Publishing & Control for Regulatory Affairs in the Renal Division at Baxter Healthcare Corporation, Tim Hughes, CRM – Manager of the Records Management Department with Madison Gas & Electric, and Dennis Larsen, CRM – Records Center Coordinator for Milwaukee County.

The presentation began with Pam Duane providing insights on the benefits of an ARMA membership. She highlighted ARMA's mission statement: "The Mission of ARMA International is to provide education, research and networking opportunities to information professionals, to enable them to use their skills and experience to leverage the value of records, information, and knowledge as corporate assets and as contributors to organizational success." Using a website to reach it's more than 10,000 members, the organization keeps members abreast of the legislative changes, offers online educational opportunities, makes available Info Pro magazine online, published the Information Management Journal, hosts a member's forum that allows members to ask questions and voice opinions, and provides links to various organizations. Visit the website at www.arma.org

Sharon MacDonald presented information about the ISGs – Industry Specific Groups. There are currently 32 ISGs sponsored by ARMA International each addresses the needs of a specific industry. The ISG program was developed to bring together professionals working in similar industries dealing with similar problems. Belonging to an ISG offers additional educational opportunities, networking, and it now is included in membership dues. There is no longer a separate charge to join the ISG; you simply need to specify which one you would like to join and you're in. Sharon encouraged all of us to take advantage of the ISGs because the benefits of discussing records management issues with someone in the same business type is truly invaluable.

Dennis Larsen was given the challenge of explaining what a CRM is and why anyone of us should want the designation. Certified Records Manager, a designation administered by the ICRM, Institute of Certified Records Managers. This certification program for professional records and information managers includes a six-part examination that assesses one's knowledge of the profession. Dennis suggested that everyone consider the CRM as a possible future goal because it provides recognition and reinforces your knowledge of records management principles. He also encouraged anyone interested in the CRM to join his study group to assist in preparation. It was also suggested that if interested, you find a CRM mentor. This was reinforced by the entire panel. Having someone that has gone through the process to work with you would be invaluable.

Tim Hughes ended the panel discussions by providing information on ARMA International Educational Foundation. "The mission of the foundation is the advancement of knowledge in the field of information

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management through the funding of research and education.” The Foundation is a funding resource for individuals and organizations, and is devoted to its mission. Tim explained that the Foundation will help to ensure that the Records Management profession continues in our ever changing environment. He introduced an upcoming endowment campaign to support the Foundation,, and ARMA members should receive this information in late September or early October.

The panel did an excellent job of providing insights into being a part of this great organization and I learned about resources at ARMA that were not known to me. What I took away from the meeting was the knowledge that there is no way on my own I could have access to the vast amount of information ARMA has provided its members. There just isn't enough time to even research a portion of the information I can access on their website. You should check it out www.arma.org



Digital Camera Donation
ARMA Milwaukee would like to express its sincere appreciation to Security Microimaging of Milwaukee for the donation of a digital camera to our chapter. Chapter Board Member Angie Morgano also deserves a thank you for orchestrating and coordinating the donation with the vendor.



CONGRATULATIONS



Congratulations to Dr. David Goodman, CRM, a charter member of the Milwaukee Chapter who was inducted to the ARMA International Company of Fellows at the 2002 ARMA International Conference in New Orleans.

Snippets of the ARMA Conference – New Orleans, LA
(All that remains after several nights on Bourbon Street with my ARMA buddies!)

BY AMY COUGHLIN

Sessions

The Educational Sessions I attended were all worthwhile, especially John Phillips' review of records management software and Jim Coulson's advice on how to Manage the Organization and Technology. His humorous (and right on) view of reality made for a fun afternoon.

Hopefully the number of sessions will increase next year and repeat sessions offered so there's an opportunity to attend all the good ones.

The Insurance ISG Networking Session was disappointing. What had been one of the most valuable aspects of the conference has declined in appeal, most likely due to lack of resources and support from ARMA Headquarters.

Exhibits

Finally, the vendors are listening! And talking our language when it comes to managing email and other electronic records. More than 15 booths were dedicated to these types of solutions but I only had time to visit 7 of them. It was refreshing to not have to explain the difference between electronic records management and electronic document management or to raise the issue of why you wouldn't want to save everything forever.

Awards Banquet

Dr. David Goodman, CRM, a charter member of the Milwaukee Chapter was inducted to the ARMA International Company of Fellows. He was recognized for his life-long commitment to records management education, accomplished mainly as a professor at the University of Wisconsin – Whitewater.

Pete Fountain, the great jazz clarinetist, was the grand finale of the evening. The opportunity to listen to a legend was quite exciting and he was very entertaining. He even incorporated the ARMA Awards Committee into his act!

Candidate Forum

Candidates for ARMA International President – Elect and Directors, including the Canadian and International Directors, answered questions posed by the Elections Management Committee and members from the audience. It was great to see so many interested in contributing in the Association's leadership roles. Transcript is/will be available at (link to ARMA web site) *I'm not sure of when this will be published to the website.*



Mrs. Goodman, Tim Hughes, CRM, Dr. Goodman, CRM, and Amy Coughlin, CRM at the ARMA International Awards Ceremony in New Orleans.

Managing Electronic Records Conference Report September 22-23-24-25, 2002 Chicago, IL

by Arlyce J Vogel, CRM

Purpose: The purpose of this report is to describe the Managing Electronic Records (MER) Conference which was designed to provide the latest information on the rapidly changing conditions related to managing electronic records. All you need to do is consider the recent business headlines of the last year (Enron and Arthur Anderson) to know how important this training is. The key objectives of the conference were to address the legal, technical, operational, and the life-cycle management issues of electronic records.

Educational Sessions: CDs containing the power point slides and the voice recordings of the entire conference will arrive in about six weeks. I will gladly share the CDs with anyone who requests them. There were 5 joint sessions, which everyone attended, and 22 educational breakout sessions (attendees chose one of three sessions for each timeslot). Knowing the CDs will arrive soon made it much easier to choose which sessions to attend.

The sessions covered a wide variety of electronic records management (ERM) issues. Some of the more interesting sessions I attended were:

- From e-Business to e-Records to e-Evidence,
- DuPont's Electronic Records Management Best Practices and Case Studies
- Digital Signatures & Public Key Infrastructure,
- The New Challenge of Instant Messaging,
- How to Successfully Dispose of Electronic Records, and
- Managing and Processing Unstructured Data.

Other sessions covered litigation holds, ERM software solutions, ERM standards, regulatory compliance issues, and emerging technologies and trends.

E-mail: The biggest single issue discussed throughout the conference was the pervasive use of e-mail messages. Several speakers told us their latest litigation horror stories and the huge out-of-court settlements that are becoming typical. Companies will settle out-of-court because it is either too difficult or too expensive to produce the volume of records included in document requests. Many companies are not equipped to produce hundreds of thousands of e-mail messages during discovery. They claim the sole purpose for keeping their backup tapes is disaster recovery. Courts are not "buying" this argument anymore. Email backup tapes are the single most requested source of responsive records today. Speakers also suggested shortening the backup tape rotation cycle to 7-21 days for all computer applications (email, file and print, and system). The argument is if the tapes are to be used for disaster recovery then 7-21 days fulfill that purpose. Records Managers were also challenged to consider the wisdom of keeping end-of-the-year backup tapes.

DuPont Case Study: Jim Michalowicz, an attorney who heads the records management program at DuPont described their electronic records management program and gave two interesting case studies. Mr Michalowicz stated that "a recent electronic discovery request cost DuPont over

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\$400M". Searching backup tapes for relevant documents took "up to 10 hours per employee account" and "cost \$100-\$150 per hour". In a 1993 case, he said DuPont searched 75 million pages of text. The search took 3 years to complete. And 50% of documents they were obliged to review had been kept beyond the approved retention time. The cost of reviewing the documents that were kept too long was \$12M. This cost persuaded business-unit leaders to support a centralized records management program.

Electronic Evidence Discovery:

Electronic evidence is fast becoming the primary focus of discovery in litigation today. John Jessen, CEO of Electronic Evidence Discovery, gave a powerful closing presentation. Jessen is the foremost-recognized authority on computer forensics and electronic evidence. He said during litigation, plaintiffs are demanding the electronic data files *even where a paper copy exists*. (Our company has already received discovery requests like this.) Courts are beginning to view printouts and written documents as "copies" of the electronic "source" file. They rely on the electronic source files as the "best evidence" because they contain the text as well as the metadata. Viewing the metadata allows experts to find information about the author, bcc audit trails, "deleted" text and much more. To demonstrate his point Jessen showed us a rather tame email message that was sent by someone who didn't understand the technical capabilities of the computer application he was using. During litigation, this same email message was turned over to the plaintiffs electronically. When the

computer forensics people showed the jury the portion of the message that had been deleted before it was sent, the true motives of the writer were revealed. The outcome of the litigation was decided on this evidence alone because the judge allowed the electronic record to be the "best evidence" of the writer's intent.

Process challenges: Plaintiffs are starting to challenge the way companies provide their responsive electronic records. Companies are forced to defend the processes they use to identify, locate, retrieve, review, preserve and produce their electronic data in the discovery process.

How can we prepare in advance for electronic discovery? Preparation pays off. Jessen cited specific ways to educate the company and begin to prepare for electronic discovery. Preparing for electronic discovery includes, but is not limited to, (1) understanding the technology and the terminology of the electronic data sets and processing standards, (2) profiling the "responsive" information and mapping them to their electronic data sets and systems, and (3) developing and implementing electronic data risk-reduction initiatives and a defensible litigation response program. Electronic Records Managers were encouraged to develop their own tools and procedures to reduce the litigation risks associate with the creation, storage, management and destruction of electronic data sets.

My opinion about the usefulness of this conference: I believe this conference brings together the "best of the best". The speakers are all top people in their fields. For 3 1/2 days they mingled with the attendees and offered their time and

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answers to real life business questions.

For example, Jim Michalowicz offered to share with me DuPont's formula for accurately calculating the cost of litigation responses. This could be used on our recent Giddings and Lewis lawsuit.

Although I was the one who attended the conference, the way the material was provided (CDs including audio and Power Point slides and the hardcopy [i.e. paper] handbook) enables anyone in the corporation to review the materials and learn for themselves. I will share this information with our CIM staff and other business areas such as the corporate secretary, library, legal, internal audits, and IT Services technical support.

I believe we should encourage our IT technical support and Legal people to accompany one of the CIM staff to the next MER Conference. Our corporate success depends on all of us working together to manage electronic records today and in the future. ■



47th ARMA International Conference, Morial Conference Center New Orleans, La

By Patricia Hardy

New Orleans and the 47th ARMA International Conference made for an interesting combination. As Hurricane Isidore threatened New Orleans, my

thoughts were of cancellation, but as the days passed and the storm hit and moved on, I decided to forge ahead and be prepared to make the best of it. I was extremely pleased and surprised to find New Orleans and the French Quarter dry when I arrived.

This being only my second conference, I'm certainly not an expert on what constitutes a good conference versus a bad conference. I thoroughly enjoyed the networking opportunities. I was disappointed only when several networking opportunities were missed because meetings were scheduled in an overlapping fashion. The ISG meeting, Region meetings and Chapter leadership meetings were all scheduled within the same time slot. I would have liked to attend them all. I hope that this situation will be changed at future conferences.

The vendor showcase was very nice; the technical briefings were educational and enlightening. I don't know whether I selected good times to check out vendors but the exhibit hall was rarely overcrowded. This allowed for good one on one conversations with vendors. I really enjoyed the vendor expo albeit I wasn't a prize winner. It's always nice to see the capabilities of software first hand and to see what ideas are in line for future enhancements.

The keynote speakers presented timely topics and overall were very interesting. The educational sessions I attended were okay, I didn't feel that I gained as much from them as I hoped. The sessions provided general overviews and I guess what I would have like was more industry specific sessions. There were of course

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several sessions on hot topics, email retention, disaster preparedness, electronic records, HIPPA, and leadership, so I did feel that the conference offered a little something for everyone. I just wasn't very enlightened after most of the sessions I attended.

When the conference day ended, there were opportunities to meet with friends and make new friends and the various ARMA social events however, shopping and the allure of Bourbon Street were too strong. I enjoyed a delicious meal at a restaurant on Bourbon Street with a few chapter members and we ventured out to check out the nightlife. Sorry we didn't flash for any beads. But it was an interesting scene.

As hurricane Lily began her approach to New Orleans, my thoughts left the conference and moved to thoughts of getting home before flights got cancelled due to weather conditions. As I left on Wednesday, it had begun to rain and this year's conference was over for me. I look forward to continually enhancing my knowledge of records management by taking advantage of our chapter educational meetings, the Spring Seminars and future ARMA International conferences. The next conference will be held in Boston and I would encourage everyone to include it in your budget. ■



Leadership, Motivation and Career Planning – October 16, 2002

By Patricia Hardy

I always accept invitations to eat at Pandl's and adding an opportunity to hear such a prestigious speaker makes the event even better. Our speaker for the evening was Alan A. Andolson, Certified Management Consultant, Certified Records Manager and President of Naremco Services Inc. Naremco is a management consulting firm founded by Emmett Leahy that has been providing information management consulting services since 1948.

Alan outlined for us what records managers must do in leadership, tools to motivate others and the steps in career planning. In leadership, you must understand the task, the team and the individuals that comprise the team. The task must be clearly defined and planned out before assigning work or soliciting resources. The team must be given structure, encouraged, motivated and communicated with. On an individual level, as a leader you should be attentive to personal need, recognize and use individual's abilities, and train your people.

Motivating a staff can often be a huge challenge; Alan explained that if a person's basic life needs are not being met, then trying to motivate that individual may be nearly impossible. Basic physiological, safety, esteem, self-respect and social needs are their immediate priority. Once these needs have been met, you as a manager can employ coaching or counseling techniques to motivate them.

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Coaching should be used with an employee that is open to suggestions, not defensive, and accepts that they need coaching. When coaching, be positive, present only facts, stay focused and if an agreement on changes is made, make sure the changes are verifiable. Use counseling with employee not open to advice, who's defensive and in denial about needing assistance. When counseling present a positive view of the staff, recognize that each is different, consider feelings and be understanding. As with coaching, make sure the changes are verifiable. Alan suggests that leaders hold a monthly discussion where the employees are allowed to give feedback on the leaders. He also recommends keeping a source diary that is maintained documenting staff observations. This diary would be a tool to use when completing reviews then discarded.

Career planning, where is your career heading? Alan gave us six career planning steps. Self assessment, know who you are, your skills, knowledge, values, interests, personality and attitude. Secondly occupational research, information search, job shadow, hands-on experience, volunteer, and know occupational trends. Decision making, know your career objectives, personal objectives, and know how community service and lifelong learning will impact your decision. Employment contacts, networking, job searching, resumes, letters and job interviews, keep up to date with contacts. Work, you've been offered the job, do you accept or has your desire changed? Know your work success and failures. Finally, life planning,

continue to re-evaluate. Start the process again. Excellent presentation!! 🚩

TREASURER'S REPORT

By Shirley Derrick

Our treasurer, Shirley Derrick reports that as of September 30, 2002, we have \$1,450.68 in the checking account and \$8,910.83 in the money market account.



CHAPTERS

**ENCOURAGE. RECRUIT.
ENGAGE IN THE POWER OF
CONNECTIONS.**

Want to grow your chapter? Want to engage your colleagues to become involved in your professional association?

ARMA International invites your chapter to participate in our member-get-a-member campaign, MemberFest!

**SHARE THE EXPERIENCE.
FEEL THE POWER.
REAP THE REWARDS.**

Chapters choosing to compete can receive rewards! Although this is a campaign based upon *individual* members' efforts, chapters can receive recognition by participation as a whole. Individual members will compete to win rewards and chapters can reap the benefits of their efforts. ***Get your members involved!***

How do we submit to compete?

Chapters need to submit a letter of intent to compete.

What are the chapter rewards?

The chapter that gains the most members as a result of their individual chapter members' efforts in their size category will be named "*Star Chapter of the Year*". The chapters competing will also receive free association memberships (minimum requirements according to size category) to use at their discretion for members gained as a result of this campaign:

Size Categories for Star Chapter of the Year

1-30 Small: Competing chapter receives 1 free association membership for every 5 members gained as a result of their individual chapter members' efforts.

31-80 Medium: Competing chapter receives 1 free association membership for every 10 members gained as a result of their individual chapter members' efforts.

81+ Large: Competing chapter receives 1 free association membership for every 15

members gained as a result of their individual chapter members' efforts

The chapters winning in each category will also be recognized at the C.O.R.E. Club Reception at the Annual Conference and Expo in Boston in addition to being rewarded the free memberships. **The awarding of the memberships will be given monthly as the chapters reach their quotas, and will be given each time that quota is achieved.**

What are the rules?

All campaign membership applications must be postmarked prior to June 30, 2003. Campaign applications received after this date cannot be attributed to the contest.

The complimentary memberships must be used by June 30, 2004.

The official rules of this campaign must be adhered to by the chapters.

Questions may be addressed to: Melissa Ebert, 913.217.6016 or mail to: mebert@arma.org



Calendar of Events....

Tuesday, November 19, 2002

Janet Nelson presenting
"A Hat for Every Occasion"
Radisson Milwaukee West.
From 5-8pm

Tuesday, December 3, 2002

"Electronic Signatures"
Joint Meeting with AIIM Wisconsin
"Toys for Tots" Charity
Annual Holiday Charity and Social
Albanese, Waukesha, WI.
From 5-8pm

January Meeting – TBA

February 19, 2002

Abbott Lab Tour
From 5-8pm



THANK YOU THANK YOU

Thank you to Pat Hardy, Amy Coughlin, CRM, Dennis Larsen, CRM, Shirley Derrick, Arlyce Vogel, CRM, Mark LeMahieu, and the Madison Chapter for photos from the ARMA Conference for your contributions to this newsletter!



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If interested contact:
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