



Meeting: Thursday, June 13, 2002, 11:30 to 1:30
Location: Doubletree Hotel, Mission Valley, 7450 Hazard Center Dr
Reservations - Contact Susan Roberts @ (858) 748-1100 x263

Expanding the Profession: Strategic Information Management

Off the Record
 Volume 43, Issue 6
 June 13, 2002



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We are very fortunate to have ARMA International's President, Terry Coan, as our guest speaker for the June 13th meeting.



Terry Coan, ARMA International President

Mr. Coan is Vice President of Customer Solutions at Accutrac Software, Inc. Accutrac markets solutions that improve an organization's ability to manage, track and access records and information.

Mr. Coan holds a Bachelors Degree in Management from the University of Phoenix and is currently a candidate for the CRM designation. He has been a member of ARMA International for over 15 years, and currently serves on the ARMA International Board as President. He is a member of the Greater Los Angeles Chapter of ARMA, and during his term as President in 1993-1994, was successful in leading the Chapter to win the prestigious large "Chapter of the Year" award. In addition to various chapter responsibilities, he has served the Pacific Region as Director, Treasurer, Conference Co-Chair, and has served on several ARMA International committees and task forces.

A Frequent speaker at ARMA chapter, regional, and international meetings, Mr. Coan was accepted in 1996 as a member of International Who's Who of Professionals. In June 2001, he was honored with the William Benedon Professional Achievement Award by the Greater Los Angeles ARMA chapter.

The program synopsis is Exploring the records management future. This session will address the business needs

of the 21st Century organization, and will discuss how we, as members of a broader profession called Strategic Information Management, can position ourselves as key strategic players.

Goals of the session include:

- Discussion of the 21st century corporation's information management needs.
- Sharing the strategic direction of ARMA in response to these needs.
- Introduce Strategic Information Management as a profession.
- Identify opportunities for RIM professionals in an expanded profession.

MEETING AGENDA

- 11:30 – 12:00 Registration and Networking
- 12:00 – 1:20 Lunch and Keynote Session
- 1:20 - 1:30 Installation of the Chapter's new Board of Directors

Please register early, as seating is limited. Don't miss this unique opportunity to explore the future direction of ARMA and to understand how YOU fit into strategic information management.

RSVP to Susan Roberts via phone 858-748-1100 x263 or e-mail her at sroberts@corovan.com

(Continued on page 13)

Inside	President's Message	2
	Strategic Information management	3
	Highlights—Disaster Recovery	7
	ARMA Contest	10
	Education Corner	11
	Reservation Form	13
	Spotlight: Dave Taylor	14



Off the Record

Association of Records
Managers & Administrators
San Diego Chapter
Editor
Cynthia Lacy
Public Relations
Jennifer Ota

Off the Record is a semi-monthly newsletter of the San Diego Chapter for the Association of Records Managers and Administrators.

This newsletter is published to inform the members of activities of the Chapter, and disseminate news and opinions of Board Members, or Chapter Members. Opinions are those of the author, and do not necessarily reflect official policy or opinion of ARMA, the San Diego Chapter of ARMA, or its members. Your statements and articles are solicited.

Submit articles to P.O. Box 8803733 or email to clacy@sddpc.org. Articles submitted by 1st day of month are considered for that period's newsletter.

Advertising Rates

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Contact Jennifer Ota at (858) 554-1529, ext. 240 for further information.
Package Deal: 1/4 page ad in all the year's Issues of *Off the Record*, one vendor table at one of the San Diego ARMA meetings, and a membership in San Diego ARMA; all for \$625.

President's Message



President's Message by Richard Berlin

The Long Goodbye

It has been a pleasure serving as your San Diego ARMA President for the past three years. I joined the Board of Directors three and a half years ago to fulfill an obligation of one of my employees. He was serving as the Public Relations Chairperson when he left the industry. I was not even a member of ARMA at the time but I thought that I should offer to step in for the remaining six months of his term. As the year ended, the President Tanya Bathard led a discussion of who would be going to replace her. I would like to tell you that my becoming President was a case of cam-



paing against highly qualified individuals and emerging as the most popular. I was the only person at the meeting who was willing to say "I'll do it."

Why would someone who had been involved in ARMA for such a short time want to be the San Diego Chapter President? During my six months on the Board I found the following factors:

The organization is critical to the advancement of our profession.
My involvement with ARMA and the

Board would enhance my growth.

The opportunities to create educational programs are limitless. I believed that my experience and skills matched what the position required.

Your Board of Directors are to be congratulated for their time and effort. The Board consists of a core of dedicated individuals who make what could be a thankless job instead a pleasurable joint effort. I feel that my three terms as President have contributed to the stability of the Chapter. We have had great educational programs and membership has grown over 20%.

I am very pleased to now leave the President position in better hands. Dave Taylor has tremendous management experience and commitment to the Records Management industry. Dave will have the same great supporting cast.

Please consider joining the Board or participating with a committee. You may enjoy it so much you will stick around for a few years.

Richard Berlin
RBerlin@NoMorePaper.com



Thanks, Richard for a job well done!!!

Strategic Information Management

STRATEGIC INFORMATION MANAGEMENT: Building Upon Infostructure WHAT IT REALLY MEANS

The concept of strategic information management has been around for several years in one form or another. Typically it has been championed by IT and consequently been technology focused. However, as is true in information management in general, strategic information management is much broader than technology. Technology is the tool that enables strategic information management.

The foundation on which strategic information management is based is simple: information management is a strategic, competitive corporate asset. RIM professionals are therefore challenged to reposition themselves and their programs, and in so doing they will ensure their relevance to their organization in the long term. Of course, repositioning RIM requires a different, broader set of skills. It also requires a new perspective.

"The recorded information management community does know its business - policies, procedures, information classification structures, retention and disposition schedules, essential records, disaster recovery planning, electronic records management even," asserts information management consultant Robert Meagher in the article "The IM Building Blocks" (*The Information Management Journal*, January/February 2002). "But information professionals do not typically know and understand the concerns of the executive in their organization - the decision maker. The information management professional does not typically know what drives the executives' decision-making. That makes positioning the information management program as a mission-critical program can be a challenge, a

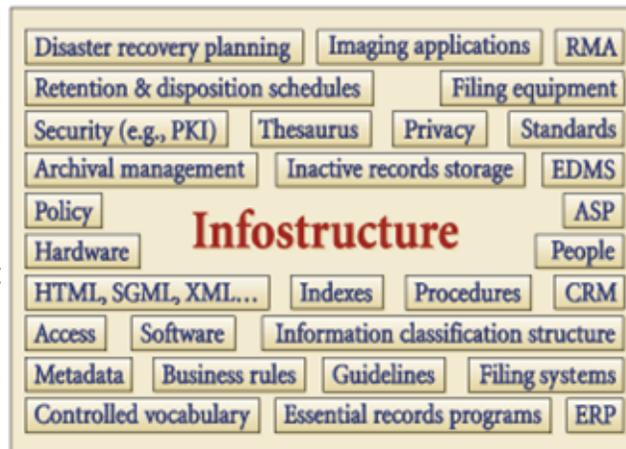
Today's RIM professionals focus the overwhelming majority of their efforts on infostructure. The elements of infostructure - disaster recovery planning, imaging application, retention and disposition schedules, inactive records storage, electronic data management, etc. - provide the foundation for information management programs. Meagher points out, "Although this infostructure is directly important to the information management professional, it may not be as important to the CEO, who is thinking about the organization's strategic future."

Information management professionals must therefore be able to translate their RIM programs and organizational knowledge into strategic business tools to make their organizations more competitive. They need to take these tools to the next level and link them to achieving organization success rather than think of them primarily as risk-mitigation tools.

Perhaps the key skill required is strategic thinking. In other words, the RIM professional must understand how its organization is positioned to compete

and with in its market and how the RIM program does and can contribute to that competitive edge. Explains Meagher: "While information managers often work within their own business group or unit, to succeed in the future they will need to intertwine themselves - in a symbiotic way - with higher level corporate strategic goals."

"Strategic planning should create a framework for ideas, for expression of a concrete plan and for the implementation of that plan," says Meagher. "More importantly, strategic planning provides organizations with a context for dealing with strategic issues and formulation within the organization. Strategy should flow from an organization's mission, vision, and values."



(Continued on page 4)

Strategic Information Management

(Continued from page 3)

What Is a Strategic Perspective?

According to Eugenia Brumm, the Strategic Information Officer at Owens Corning, thinking strategically requires that RIM professionals develop

1. Knowledge and understanding of the industry - what is the key business? What are the regulatory factors affecting how the organization conducts business?
2. Knowledge and understanding of how the organization wants to compete in that industry. Does it want to provide premier customer service? Or does it want to be the low-cost provider? Maybe it wants to be acknowledged as the leading expert in the field. What is the target market and how does the organization attract the customer to its products and services?
3. Knowledge and understanding of the organization's strategic goals and objectives
4. A horizontal, enterprise-wide perspective on the organization's infrastructure - not just what each department does, but what are the inter-relationships between the departments. How is outsourcing used and what is the organization's relationship to its suppliers?
5. Understanding of the "flow" of the work and information throughout the organization. If the goal is to get a certain quantity of product to a customer within a specified time frame, understand how both product and information facilitate that process. Ask the question "What do I know about the information we use that could speed up the response time or make the answers more precise?"

Thinking strategically, in other words, requires RIM professionals to "develop an external - rather than an internal - focus and to develop a direction for the organization by using the information assets to drive that direction."

M a k i n g I t R e a l

What are specific ways in which you can develop an external focus that will help you reposition yourself and your program within your organization? We invite you to share your own experi-

ences and thoughts on how records and information management can make an organization more competitive.

MANAGING INFORMATION AS AN ASSET, PART 1

One of the primary concepts underlying strategic information management is that of managing information as an asset. Just as companies must manage finances, human resources, buildings, and equipment in order to realize the full value of these assets, they must also manage their information. Those in the records and information management profession have talked about this concept for some time, but they have found implementing it to be an increasingly complex challenge.

What does it mean to manage information as an asset? The answer varies, depending on which segment of information management professionals is asked. Yet, each identifies an important principle of strategic information management.

For instance, those involved in systems development have identified the need to consider the entire enterprise when selecting projects for systems development purposes. In an article in the November 1996 issue of *Managing System Development*, authors Timothy D. Wells and Christine D. Sevilla observe that the selection of projects that are beneficial to one department can actually work to the detriment of the overall enterprise. They come to the conclusion that it is better to select systems projects "based on the idea that objects of information are real assets that are enhanced (or diminished) in value by the way we organize and manage the enterprise." The authors suggest that projects be assessed on their potential for contributing to the overall success of the enterprise.

This perspective represents an important concept in strategic information management. First, it focuses on the needs of the entire enterprise rather than on isolated department needs. Second, it recognizes that the value of an organization's information can vary, based on how it is used.

(Continued on page 5)

Strategic Information Management

(Continued from page 4)

Third, it acknowledges that systems projects have more value if they purposely organize and use information to bring more success to the organization.

However, this article does not address some critical issues. For example, who should conduct the assessment? What criteria should be used to determine the value of the information to the whole enterprise? One of the goals of strategic information management is to answer these questions and to ensure that these issues are addressed in a routine, consistent, and formal manner throughout the organization.

For the information technology segment of the information management community, information security is the most critical part of managing information assets. In a white paper entitled "Managing Information Assets: Understanding Critical Issues Associated with Information Management," author Perry Gleason points out the importance of information assets being identified and protected.

"Many organizations are not attuned to viewing information as an asset," Gleason writes. "Frequently there is no formal methodology for identifying information assets. It is common for organizations to under-estimate those information assets that have value, and therefore require some type of protection."

However, for Gleason and his sponsoring company - Protegrity, which is a high technology company that specializes in encryption products - managing information assets comes down to managing information based on access restrictions and permissions. Clearly, this is an important concern, but it is just one aspect of managing information as an asset.

Other viewpoints focus on specific technologies and not necessarily on the business purpose or reason for using them. Though we have reviewed only a few samples, one thing does seem clear. Frequently it is the technology that is driving the business decisions, rather than the needs of the business driving the use of technology.

Because these perspectives represent important principles of strategic information management,

information professionals must have an understanding of them. Part of managing information from a strategic perspective means integrating these principles with a broad-based understanding of the organizations' purposes and goals. Through strategic information management, records and information will play a critical role in helping organizations meet their goals more effectively.

MANAGING INFORMATION AS AN ASSET, PART II

PRIMARY OBJECTIVES FOR STRATEGIC INFORMATION MANAGEMENT

Part I of this discussion proposed a general view of managing information as a strategic asset. Part II will describe six primary objectives of strategic information management. In this model, each objective would be governed by corporate policy and supported by systematic processes, best practices and technologies. This model places the primary attention on the business needs. Technology, then, is viewed as a means to attain business goals and strategies, rather than the driver.

The Objectives

1. ***Leverage information for maximum effectiveness throughout the organization.***

The task of "getting the right information to the right person at the right time..." has become more complex than ever. Today's employees generally have more direct access to information than in the past. But they might still be missing the boat if the systems were designed with only one department's needs in mind. RIM professionals who want to remain relevant in their organizations will need to learn more about the *content* of the information used in each business process. Once the content of the information is understood, it is possible to analyze the strengths and weaknesses of how the information is used. Then workflow patterns can be designed to ensure the critical information is available when it is most needed. This is where the power in information can be realized. Enterprise Rent-a-car was recently spotlighted by *CIO* magazine (<http://www.cio.com/archive/020102/enterprise.h>)

(Continued on page 6)

Strategic Information Management

(Continued from page 5)

[tml](#)) as one example of what it can mean to design a process so information is used more efficiently. Enterprise Rent-a-car gets a significant percent of its business from rentals paid for by insurance companies when a client's car is in the repair shop. The old system was paper-intensive, slow and frustrating to everyone, so Enterprise developed a Web-based application that is shared with auto repair shops and insurance companies. Through it, insurance companies can authorize payments, Enterprise can make the cars available, and auto repair shops can provide up-to-date information on when repairs will be completed. This results in better service to the customers and less hassle for everyone. Enterprise has removed about 8.5 phone calls and ½ day from a typical rental cycle. In addition to making customer transactions easier to handle, the insurance industry is saving between \$36 million and \$107 million annually. Enterprise may not have called this "strategic information management" - yet the example shows how conscious attention to the use of information can benefit customers and the bottom line. If information management professionals make this kind of assessment a routine approach, their contributions will be valued as contributing to the company's overall success.

2. Protect information from a variety of threats and for a variety of purposes.

Protection of information has long been a concern of RIM professionals. Recent current events have brought much-needed attention to the importance of protecting records so that the most critical business functions are restored quickly. ARMA members report that disaster recovery planning is receiving new and added emphasis from management. Yet there are some new aspects to protecting records that can expand the scope of information management. Privacy legislation is creating new business requirements for how individual information is handled. Information management professionals can provide valuable input in the area

of information security. Likewise, it is appropriate to begin addressing intellectual property issues. These issues take center stage as organizations rely on an expanding network of suppliers and business partners in their efforts to become more competitive. This provides an opportunity for the information management professional to make new contributions to the organization.

3. Monitor the use of information to ensure consistency in information practices.

Compliance with the retention and disposition program will remain a strong component of strategic information management. In addition, strategic information management encourages a more proactive role in new areas of compliance: · information ownership, stewardship and due diligence in contracts with suppliers and business partners · auditing the use of information to ensure it is in the right place at the right time · modifying business processes if information is not being leveraged

4. Quantify the value of information.

Strategic information management takes on the challenge of quantifying the value of information. Imagine being able to file an insurance claim for more than the replacement value of the media on which the information is printed. Imagine being able to determine the "worth" of a potential company acquisition based on its information, and not just its physical assets. Admittedly, this objective requires the expertise of professionals outside the world of RIM. However, an effective solution or method for quantifying the value of records and information would help to impress senior management with the value of managing their information and the risks of not doing so.

5. Forecast information that will be needed in order to make business units successful.

This aspect of strategic information management calls for a proactive role in determining what records *need* to be created. A number of factors will enter into this assessment: compliance with legal authorities, understanding the current workflow and information needs of the business units, working as a partner with

Strategic Information Management

business units as they change their processes, and working with IT/MIS to design the technology infrastructure based on information needs.

Maintain information for legal compliance and long-term access. RIM professionals must ensure compliance with legislative requirements and address the challenges of long-term preservation of records in non-paper-based media. The very fact that some corporate records require special attention in order to meet legislative requirements makes them an asset. If processes and systems are not in place to ensure that they are handled properly, those same assets can become a liability. The long-term preservation of electronic records continues to be an issue that RIM professionals grapple with. The life of paper and microfilm is proven. The life of CD-ROM and other electronic media has not been proven yet. Regardless of the medium, the content is the asset, and it needs to be managed as such.

Even though many of these concepts and disciplines already exist in the marketplace in some form, they have **not** been formalized or integrated to ensure that organizations can fully leverage their most valuable asset and competitive tool.



Highlights—Disaster Recovery Lessons Learned After 9/11

The May meeting featured a very interesting presentation by Ralph Selle, Iron Mountain, concerning disaster recovery best practices. Mr. Selle recounted many interesting and timely experiences from his many years as a disaster recovery specialist. His experiences brought to life the many obstacles and challenges faced by the disaster of 9/11. Mr. Selle was called to New York shortly after the tragedy to help some of the companies devastated by the collapse of the World Trade Center. Iron Mountain used to have a storage vault in the basement of the World Trade Center so Mr. Selle was very familiar with the area. In fact, Iron Mountain moved from the building during May and June!

When Mr. Selle first started in this business, the most popular medium available for saving data was tape backups. Now, vaulting and mirroring/shadowing are included as alternatives. Mr. Selle was quick to point out that tapes are still the most reliable and cost-efficient way to save critical data.

One of the jobs Mr. Selle was involved in was getting a business back up and running in the Tampa, FL area. Because no planes were flying, they had a kind of Pony Express using trucks loaded with 10,000 tapes. The route started in New Jersey, traveled to Philadelphia where new drivers and trucks took over. The route continued to Baltimore, WA, Raleigh, NC, Atlanta, GA and finally Tampa, FL. The total time involved in getting the business up and running was approximately 30 hours!!

There are many items to consider when making decisions about disaster recovery. One must take into account:

- 1) critical business processes
- 2) Operating systems, hardware
- 3) Recovery time
- 4) Data location
- 5) Data currency

You must also take into consideration the following items:

- 1) analyze, evaluate, quantify and prioritize the potential loss of your data
- 2) select the best backup methods
- 3) develop realistic disaster recovery plan
- 4) test, test, test
- 5) consider document archival as part of disaster recovery and business continuity planning

The cost of planning for disaster recovery is expensive but well worth the cost as a safeguard to staying in business. The Board of Trade has estimated that

(Continued on page 8)

Highlights -Disaster Recovery Lessons Learned After 9/11

downtime would cost them \$4 million/day. Studies have shown a direct correlation between downtime and business continuity. If business suffers a 72-hour outage, they have a 40% change of failing within 3 years. A business outage of 48 hours would bring that percentage down to 21%.

This was a very informative and instructional presentation which made everyone much more aware of the costs and necessity of disaster recovery planning.



Susan Comer presenting Ralph Selle with the Certificate of Appreciation.

Check out Mr. Selle's presentation at <http://www.sandiegoarma.org/>



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Why ARMA??

Membership Corner *by Susan Roberts*

Hello to all.....

This is the l-a-s-t newsletter – (for this ARMA-year)

It has been a very busy year for so many of us.

Check thisresearch that.....finish this large project.....hurry and get your work done to meet the deadlines....

NOW COMES THE SUMMER-TIME FUN....

But before your summer begins and your mind goes to beach-barbeques, vacations, having fun in the sun etc.....

One more ARMA MEMBERSHIP COMMERCIAL –



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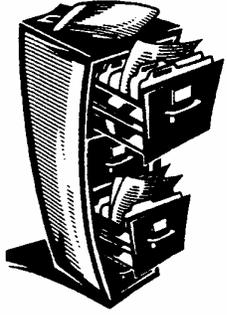
vides –
ing

Now.....go back to thinking about where you will spend your vacation – and which park or beach you will go to for the family get-together.....this summer....

But – when you turn your calendar to SEPTEMBER –

REMEMBER – ARMA

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A Contest

BRING A GUEST TO THE LUNCHEON

Come to the Luncheon—1st time this year!

Bring a book for the Literacy Program
Contribute an article for the newsletter
(More ways to win will be announced)

You will receive a Blue ARMA Card

Collect these ARMA Cards till the end of the year!

For the person who has the most Cards collected,
our ARMA Reward will be...
(Drum roll!)

A \$50 Gift Certificate to any Westfield Shopping Center!



Education Corner

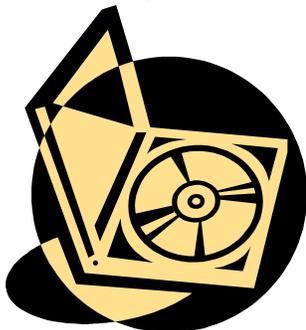
by *Benay Berl*

T

he San Diego ARMA chapter has an outreach program that supports the future records managers in our community. Working with Mesa College, and their certificate and degree programs in Records Management, students are required to take a class in basic records management.



Each semester, students in the Records Management class CBT205 complete a essay, choosing one of three topics; Why I Want A Career in Records Management, A Solution To A Records Management Problem, and Why Records Management Is Important Today.



Each academic year the top three papers from the Fall and Spring semesters are submitted to a committee of ARMA board members, who judge them for originality, content, format, and grammar.

The six finalists are invited to attend the June general meeting. They are introduced to the attendees, and are presented with plaques and cash awards from \$25 to \$100. The winning essay is published in the Fall issue of our newsletter, "Off The Record."



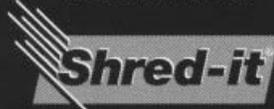
If you attend the June general meeting, please take the time to introduce yourself to the students, and welcome them into our professional community.



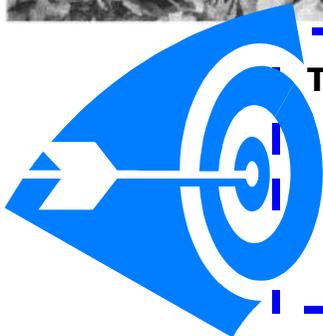
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Expanding the Profession: Strategic Information Management

(Continued from page 1)

Map to Doubletree in Mission Valley

From I-5, East on I-8,
to 163 North, take
Friars Rd. East exit,
turn Right on Frazee
Road, turn Right on
Hazard Center Drive

Friars Rd.
Frazee Road
Doubletree Mission Valley Hotel
Doubletree Hazard Center Dr.

From 163, exit Friars Road East,
turn Right on Frazee Road, turn
Right on Hazard Center Dr.

Doubletree Mission Valley Hotel
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San Diego, Ca. 92108
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To Register: FAX this form to Susan Roberts at (858) 679-7341, or CALL Susan @ 858-748-1100 x263, Via Email : sroberts@corovan.com. NO LATER than 3:30 p.m., , June 3, 2002. Cancellations later than 24 hours prior to event will be billed.

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Spotlight: Dave Taylor

The featured person this month is our incoming president, Dave Taylor. This interview should give you some insight into the man, his background, his work and philosophy.

1) *I understand that you are the new incoming President for the San Diego ARMA chapter?*

Yes, I take office June 13, 2002. It's quite an honor, and I'm looking forward to the coming year. Our membership is presently at 86 and our luncheon meetings have been real success stories. Richard Berlin, our previous President for three years, built a great team, which makes my job easier since the majority of the Board will be in the same team this coming year. We'll be having a planning meeting in July to set our goals and speaker topics for the coming year.

2) *Tell us a little about yourself.*

Well, I was born in Winnipeg, Manitoba Canada and spent the first 10 years of my life on a market garden outside of a small Canadian prairie town, Killarney, less than a hundred miles north of North Dakota. My parents immigrated to the US, first to Yuma which only lasted a couple of months due to the severe heat (and it was only May), and then finally to San Diego where we've been ever since. I'm married and have two kids. My son is married and a teacher, my daughter is a student at SDSU, and my wife is a substitute teacher.

3) *Any hobbies?*

I enjoy reading historical biographies and novels, traveling, genealogy, playing cards, chess, and backgammon. I'm a member of the San Diego Civil War Round Table and editor/webmaster of their newsletter. I also was the editor for this newsletter, *Off the Record* for three years and Webmaster for the ARMA Pacific region this past year. As far as sports are concerned I enjoy bicycling, and when I retire I plan to go across Canada on a bike.

4) *What got you interested in ARMA?*

It all started with my work. I've worked with San Diego Data Processing Corporation for the past 19 years and my main area of managerial responsibility is the implementation of Records Management and Document Management Systems (RMS/DMS) for various City departments. While implementing the first big electronic DMS for the City (mid 90's) I observed a lot of frustration from management about how we (Data Processing) didn't know the business of records. I took that as a challenge and read about ARMA in a magazine. After attending a meeting here locally I found the group to be friendly and extremely informative. What started out as a fact-finding mission has turned

into several years of wonderful networking and an understanding of records and its importance in our lives.

5) *What do you see ahead for ARMA?*

People that deal with records are responsible for their safekeeping but stand at an important junction today. We live in an age of great technological advances, in particular the computer and its application in the records industry. The Records Manager (RM) is the heart and soul of an organization and the role/person has always been in an organization in one form or another. Today the RM is becoming more recognized and needed. Handling such diverse things as: subpoenas on e-mail, building retention schedules, archiving documents, installing electronic document management systems, etc. The RM is in a field that is continuously changing due to technology. The interesting challenge is that while the basic records management fundamentals are essentially the same, the RM is also asked to keep up on the cutting edge of computer technology to better do their job.

6) *Do you have any sage advice/words of wisdom to share?*

When I was young I created a symbol for myself to live by. It is a triangle with an eye in the center (no, I'm not a member of a strange sect). The three corners represent what I considered important and what one should strive for. On the top corner of the triangle is "family," the lower left corner is "community," and the right corner is "work." The eye in the center indicates taking care of your health. And, of course one always puts a motto at the bottom, "Whatever you do, do it passionately, and to the best of your ability."

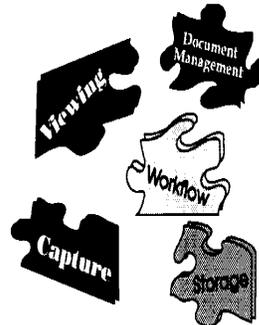


**Next San Diego ARMA
Board Meeting
Planning Session**

**Where: Benay's
Date: July 20, 2002, 10 am**



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