



Meeting: Wednesday, September 15, 2004, 11:30 to 1:30  
 Location: Holiday Inn—Kearny Mesa  
 Reservations - Contact Linda Maczko @ (858) 534-3995  
 On-line RSVP: [http://www.sandiegoarma.org/arma\\_registration.htm](http://www.sandiegoarma.org/arma_registration.htm)

## MEET YOUR ARMA INTERNATIONAL TOUR GUIDE & LEARN THE BENEFITS OF ARMA INTERNATIONAL

# Off the Record

Volume 42, Issue 1

September 15, 2004



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### Meet your ARMA International Tour Guide

Take this opportunity to meet ANITA WILLIS, the Director of Member Services at ARMA International. This is a great chance to get updated on what is happening at ARMA International and how you can take advantage of the many resources the organization makes available to you. Ms. Willis is responsible for the growth and retention of ARMA International's membership base and oversight of related processes, member and customer service, membership marketing and membership retention and administration of the Association's awards program.

She works closely with ARMA's leadership including the region managers and coordinators, and the International Ambassadors and liaisons. She also is the headquarters representative on the Member Relations Committee, the International Relations Committee, the Awards Committee. As a member of ARMA's headquarters management team, she also participates in the Strategic Planning Committee.

Anita will also talk about the learning opportunities available at the ARMA International Expo in Long Beach. You will be exposed to a great variety of educational opportunities and vendor exhibits covering these issues:

- \* Compliance/Risk Management
- \* Legal/Regulatory Issues
- \* Privacy
- \* Document Management Software
- \* Preparedness solutions
- \* Records management software
- \* Disaster recovery systems and solutions
- \* Electronic records systems and storage
- \* Storage systems
- \* Micrographic systems
- \* Document security systems
- \* AND MUCH MORE!!

ARMA International's 49th Annual Conference in Long Beach, CA will be held October 3-6, 2004. There is so much to see and so many choices to make. Wading through the session titles and descriptions is a daunting task.



Anita Willis  
 Member Services Director  
 ARMA International

Who are the best speakers? Should I stay on "Track"? What sessions are available outside of the main conference? What is the difference between an Industry Intelligence Session and a Technology Application Briefing? How can a visit with over 150 vendors in just a few hours? Where should I stay? After a long day of education, where are all those networking opportunities?

Even if you cannot attend, this meeting will provide you with some insights into the conference as well as benefits you might use to convince your management to let you attend next year!

Anita joined ARMA International's Staff in 1997, and was promoted to Director of Member Services in 3001. She is active in ARMA's Greater Kansas City Chapter, the American Society of Association Executives, and the Kansas City Society of Association Executives.

### MEETING AGENDA

- 11:30—12:00 Registration & Networking
- 12:00—12:15 Chapter Meeting
- 12:15—1:30 Lunch & Keynote Speaker

Mark your calendars for 11:30 AM, September 15th at Holiday Inn in Kearny Mesa.

Please register early as seating is limited. RSVP to Linda Maczko via phone: 858.534.3395 or mail to: [lmaczko@ucsd.edu](mailto:lmaczko@ucsd.edu).

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# Changing Times Demand Creative Solutions

## Off the Record

Association of Records  
Managers & Administrators  
San Diego Chapter

Editor  
Cynthia Lacy  
Public Relations  
Laura Avilez

*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.

Email articles to [clacy@sddpc.org](mailto:clacy@sddpc.org). Articles submitted by 1st day of month are considered for that period's newsletter.

### Advertising Rates

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1 Page \$400  
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1/4 Pg \$125  
Business Card \$50  
Flyer Insert \$400 (one-time)

Contact Laura Avilez at (619) 542-6842 for further information.

**Package Deal:** 1/2 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 \$495.

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Check out the lower prices!!



President's Message  
By Susan Roberts



*reative Solutions.....at your job....at home....even during your leisure-time activities. At one time or another, haven't we all needed creative solutions?*

This catch-phrase/slogan for the upcoming Long Beach International ARMA Conference will be more fully explained at the conference as well as at our upcoming luncheon/seminar on September 15<sup>th</sup>.

But first...**WELCOME BACK!** As we begin the 2004-2005 ARMA San Diego-year. Our "personal" ARMA San Diego catch-phrase/slogan is "**Covering all the Bases.**"

This promises to be a year with really great opportunities for learning and growth for our ARMA San Diego members and guests who will be attending the upcoming seminar and luncheons.

Our luncheons for this year will be September 15<sup>th</sup>, November, February and June.....with the dates coming soon for the luncheons following September.

Each and every luncheon will be a day for YOU – whether your job is a manager/administrator....or not....whether you are new at the profession or have been doing your job for years.....there will be sessions of interest for all.

"Information is one of the most vital, strategic assets any organization possesses. Recent regulatory requirements, such as the Sarbanes-Oxley Act of 2002, make managing information both a business priority and a legal obligation that demand the attention of executives and also corporate boards.

Properly organizing and maintaining records and information – in paper and electronic formats – is key to enterprises of all sizes and types. The ability to identify, organize, maintain and access needed information and properly dispose of the rest....pays off in costs savings, efficiency, regulatory compliance and reduced litigation risk."

ARMA San Diego, in the coming ARMA-year will be offering a variety of speakers with **information-you-can use...**

So, please remember that ARMA San Diego is 'here to help.'" Don't hesitate to call us with your questions or comments.....anytime.

See you at the September 15<sup>th</sup> luncheon.



# ***Are Your Files Ready for Disaster?***

## **Are Your Files Ready For Disaster? By Michelle Stewart**

Records management is an essential, yet often overlooked, issue in our world today. Records can contain vital information such as our bank balances, proof of ownership, tax information, insurance information, etc. Most importantly, records can help us replace what we lose in a natural disaster; such as a fire or an earthquake. But what happens in a case where your records are destroyed in a natural disaster? Keeping records safe in an emergency is something that people are not taught. How many times do you hear, "in case of emergency, save your important papers?" You never hear it. As a matter of fact, many people keep their important papers in places that are dangerous to get to in the time of an emergency. It may seem like a good idea to keep your files in a locked cabinet or upstairs, but in reality, that's very risky. During a fire, you don't have time to run upstairs, unlock a cabinet case, or search through the house for the hidden files. This same logic applies to major businesses as well. They need to develop better procedures to deal with files during an emergency. Many businesses store their important files inside their building. But once again, what happens to the files during an emergency? You don't have the time to gather every single file and move it to safety. And once again, at the end of the disaster, you are left file-less. I have a few file storing solutions for the home and office that could save your files, and your peace of mind, during a disaster. Just remember, although record storage is just a small part of records management, it's the part that could save your files from harm.

First, we will start in the home. Every person stores important papers in their house; everything from bank statements to wills, yet no one ever prepares their files for a natural disaster. As a matter of fact, most people don't prepare for a disaster at all! According to an article by Andrea Petersen, "A survey by the American Red Cross revealed that 58% of American's hadn't assembled a disaster kit." That thought alarmed me. If people didn't even plan ahead for their own safety, they would never think to plan ahead for their file's safety. I began to search sites to see if files were even mentioned as an important item to pack in an emergency. After searching [prepare4disaster.com](#); [quakecare.com](#); and [red-cross.org](#), I realized that there were no web-sites that mentioned the importance of record safety. The public is completely unaware of how important the files in your house can be. If your house were to burn down, an insurance agent would need proof of the items that were destroyed in the fire in order to pay you back faster or, in some cases, whether to pay you at all. According to [www.menlofire.org](#), "Most insured individuals are requested by their agent to make pre-fire household inventory. Almost no one does. A pre-fire inventory, or even photographs taken before the fire, can help immeasurably in the claim estimating procedure." They later go on to state that you should, "Make an inventory of damaged personal property showing in detail the quantity,



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# ***Are Your Files Ready for Disaster?***

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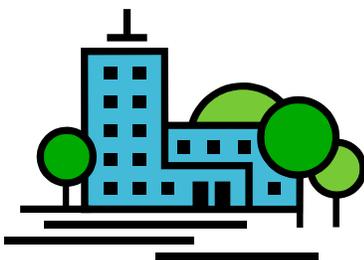
description, what you paid for the items when you purchased, how long have you had the items, the amount of damage they sustained and how much it would cost to replace them. Include with the inventory any bills or documents which can help establish the items' value." This is where we begin to see the importance of home record for your furniture, appliances, etc., reimbursement by your insurance company would go much smoother and you may get more money back in the end. Luckily, most people do remember to save their receipts and bills. Unfortunately, those are usually the records that are lost in the disasters. My solution for this problem is very simple, doesn't require much money up front, and could save your most important files from disaster.



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Each house should try to invest in fire-safe filing cabinets. In those cabinets, you should store all your non-essential records. The second thing to do would be to invest in a small, portable, locking, fire-safe filing box. Put only your very most important papers into this box (proof of ownership, a video "diary" of house, insurance forms, birth certificates, etc.). Make sure that every 6 months (or a time period that suits you best) you go through the box and make sure that all the files are up to date and accurate. Place this box in the same area you store your emergency supply kits. Be sure that this storage area is close to the door incase you need to make a fast exit; somewhere near the door would be a great example. Now, if there is a fire, on your way out of the house you can grab the file box and take your important files with you to safety. Of course, you could live without all your files and you could replace them all eventually. But why go through the hassle and heartache of replacing them when you don't have to? Especially when avoiding this problem would be so easy!

Businesses need to create and enforce safety plans for their records and files. The collapse of the World Trade Centers in 2001 made it obvious just how important file safety procedures can be. After the towers were destroyed, many companies lost thousands of files resulting in a close of business for several days up to a week. With proper planning, all of this could have been avoided. Cantor Fitzgerald became well-known as a result of their disaster-recovery plan. A disaster-recovery plan tells your company exactly what to do in the case of an emergency: what alternate facilities can be used, where backup mediums are located, etc. When the first plane struck, Cantor Fitzgerald's disaster plan went into effect. The people of the company began to relocate files to temporary office sites and they began to backup all their data. When the second plane hit, it destroyed the tower and completely demolished the Cantor Fitzgerald offices. Cantor Fitzgerald lost 658



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# ***Are Your Files Ready for Disaster?***

*(Continued from page 4)*

employees and all their data and equipment located in the tower that day. But thanks to their disaster plan, they were able to resume business within two days of the attack. Unfortunately, not every company uses a disaster-recovery plan. Worse yet, the disaster-recovery plans of today are not 100% effective. I have a few simple changes to these plans that could help make them a lot more efficient.

My improvements for record safety in a business setting are simple yet effective ones. First, ALL businesses should develop a disaster-recovery plan for their records. This plan should be practiced every six months, like a fire drill, so that all employees are comfortable with the plan in the time of an emergency. Although records safety is an important issue for a business, an astounding number of companies do not have a disaster-recovery plan. I asked my mother, Karen Lewis, if her office at Grace Lutheran Church and School used or even had a disaster recovery even heard of that." The organization a disaster-recovery plan. She went ever worked for had a disaster-thought. Companies deal with large pers, yet they do not have any plans change; every company needs to plan. However, an effective disaster-to the record safety issue.



plan. Her answer was "no, I've never she currently works for does not have on to tell me that no company she recovery plan; this is a disturbing amounts of extremely important pa-in case of a disaster? This needs to make and enforce a disaster-recovery recovery plan is not the only solution

Every company should make backup copies of their important files. I realize that many companies do this already. The problem with the current plan is that companies store the copied files in the same area as the original files. This does absolutely no good in the case of a disaster. My idea is to store the copies of the files in the office and to store the original files in a completely separate building designed especially for file storage. These storage buildings should be built under the ground so that they are completely impervious to any natural disasters and/or planned attacks. All files inside the building should be allowed to be "checked out" by the company that owns them. It's the same concept as a library, except that the only person allowed to check out a file is the person who put it there. In the case of a disaster, even if the company were destroyed, the original files would still be protected and intact if filed in this special building. I believe that this change could significantly improve the recovery time for businesses after a disaster and would add a feeling of security to the business members and their clients.

Overall, I feel that record safety is the most important element of records management. I really wish that more companies and individuals would begin to focus on just how important file safety is. Perhaps after

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# ***Are Your Files Ready for Disaster?***

*(Continued from page 5)*

reading this essay, people will begin to take file protection more seriously. Maybe they will begin to store their important files in better, safer locations. If I can influence one person to change their filing habits, or if I can save one file from being destroyed, then this essay has done everything it was designed to do; keep records safe.

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Michelle Stewart's Grandmother, Tracey Sanford and Crystal Escalante (students) Benay and Cassie Morton, Dean, School of Business and CBTE at Mesa College. Congratulations to all the contest winners!

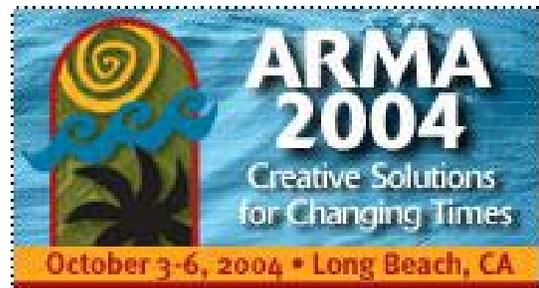
# Pictures



Thanks!! Robert Zornado (Treasurer) and Patsy Bell (Secretary) for three years of service to San Diego ARMA. We really appreciate all your hard work and will miss working with you this year!!



**THANKS!!** Steve Gray for a very informative and enjoyable presentation on ethics. Congratulations too, on becoming one of the International Board of Directors! Your help as Pacific Regional Director has been invaluable.



Our hardworking Board Members taking a break during our July planning session. Back row, left to right: Tracee Hughs, Linda Maczko, Alex Fazekas-Paul and Richard Berling. Front row, left to right: Laura Avila, Susan Roberts, Candace Sanchez, Cynthia Lacy and Benay Berl. Thanks especially to Cheryl Young, our Pac Region Representative who came to help us with our session—you're help and insight were invaluable. Jennifer Ota and Hazel Viagedor were not able to make the meeting. We're all looking forward to the seminars and tour scheduled for this year. We hope to see YOU there!!

# Holes in Records Management Programs

Many organizations have much greater legal, compliance, and business risks than their senior management is aware of. This is the key finding of a joint survey sponsored by AIIM International and ARMA International, and conducted by Cohasset Associates. The research focused on the business compliance and operations practices relating to the management of electronic records.

The many risks identified in the study should be recognized, deemed unacceptable by executive management, and addressed promptly. The study recommends that senior management deploy new and additional resources to (1) reduce unwanted legal exposure, (2) improve currently sub-standard records management processes—to credible performance levels (in the eyes of courts and regulators) and (3) ensure the availability of needed digital information that is legally credible over time. Key findings include:

- The majority of all records being created, electronic records, are not included in nearly half (47%) of all organizations' retention schedules covered by records management programs, policies and procedures, retention schedules, and hold orders.
- Nearly two out of every three organizations (65%) do not include electronic records in their court-ordered records holds (indefinite retention of records pending the resolution of litigation or regulatory inquiry).
- By a large majority, records managers (62%) are not confident that their organization could successfully demonstrate that its records were accurate, reliable, and trustworthy many years after they were created.
- More than half (53%) of respondents reported that their organization does not realize that it will have to migrate many of its electronic records in order to comply with established records retention policies.

The study shows, however, that record managers increasingly are recognizing the virtually inevitable role the IS/IT must play in the management of electronic records. Now this realization must be shared with executive management. In turn, leaders in the IS/IT community also need to better understand their important role in the lifecycle management of electronic records. However, as illustrated in the table below, there is a gap in IS/IT's comprehension of the unique issues associated with the successful management of electronic records.

<b>Q10 vs. Q11 Response:</b>	<b>1999</b>	<b>2001</b>	<b>2003</b>
Q10: Does IS/IT Manage Electronic Records? "Yes"	70%	77%	71%
Q11: Does IS/IT Understand Records "Lifecycle?" "Yes"	28%	25%	33%
"Manage" vs "Understands Lifecycle" Gap	42%	52%	38%
% Reduction—1999 to 2001		23%	
% Reduction—2001 to 2003			26%

In essence, records managers are stating that the majority of those who are responsible for the day-to-day management of electronic records (now the largest volume of new records) do not understand a fundamental concept, namely that records have a life and, accordingly, a death.

This is a very significant problem and, in Cohasset's opinion, portends three serious consequences. If electronic records are retained without a clearly defined disposition time (as determined by an organization's retention schedules), the first consequence will be that the volume of these records will rapidly grow and the growth will be mirrored in the overall cost for records storage. The second consequence is that all such unnecessarily retained records can be the subject of legal discovery and all of the costs associated with such responses for producing records that should have been destroyed are 100% wasted expenses. The third, and potentially most significant consequence, is that these records then can be "ammunition for the enemy" and used against the organization in future litigation.

Given this problem and the potential consequences, it is Cohasset's belief that there is a major need for heightened awareness of records management concepts and practices by IS/IT, and a corresponding need for education of IS/IT by the subject matter experts on records retention, namely the records managers. Cohasset further believes that records managers' education effort should be aggressively proactive and begin as soon as possible. Additionally, the education must be ongoing, not a one-time project.

*Robert F. Williams is president of Cohasset Associates, Inc. (<http://www.cohasset.com>). He also organizes the annual National Conference on Managing Electronic Records (MER) focusing on the legal, technical, and operational issues of managing electronic records. Mr. Williams is a Fellow of both the AIIM International and ARMA International.*

Article appeared in AIIM-EDoc Magazine, March/April 2004.

# Records Management: More than Technology

Though many companies understand the challenges of records management and are focused on addressing those challenges; many companies have not done so—continuing to grapple with complex data and compliance issues that stretch patience and resources thin. For these companies without well-organized policies and procedures in place, or those with policies that are seldom adhered to, records management as a standalone activity may have little real value. For these companies, the change management and other implementation issues around getting the basics right for RM is greater than the holy grail of “compliance”.

The traditional demands of IT that have balanced value against vision/strategy are now being pulled to meet another demand, that of regulatory compliance. Compliance with regulatory requirements is nothing new, but in the last few years a raft of new legislation dealing with information and data management has come into force that has, allegedly, become the driver behind many electronic records management (ERM) implementations.

In an ideal world, there would be a perfect balance between these two forces, but the world is far from perfect. When you have to justify a cost on the basis that it is a requirement and not a driver to increased revenues or cost savings, that can be difficult in today's economic climate. As a result, for those trying to ensure that essential regulations and safety issues are met, the task of gaining internal support is not always easy, despite the inherent risks of breaching regulations. The current claims by software vendors and PR/analysts of a massive increase in interest for RM needs to be taken with a pinch of salt. There is an up-tick of interest, but converting that interest into serious projects with senior management support and funding is another issue.

One of the major problems is that it can be near impossible to build an economic business case for ERM. As a result, when it comes to high-level decision-making, there can be little corporate enthusiasm for the project. For the reality we face is that many organizations, though publicly espousing their “ethical: charters, internally give little more than lip service to such issues. It's not that they are inherently unethical in nature, more that they see wrongdoing as something done by others, often by “unscrupulous rivals,” their own sense of objectivity can be an unconscious mask that obscures bad practices.

To compound this situation, few people are really all that concerned about the potential punishment of non-compliance. There are less than convinced that serious efficiency or streamlining benefits can come from ERM implementations. The horror stories from Tyco, Enron, and HealthSouth are often used as internal justification and proof that “my company” is going ok. The sheer outrageousness of these companies' actions can lead others to believe that their far more minor misdemeanors will be of little interest to regulators.

The bottom line is that ERM practitioners need to become more adept at building commercial and convincing arguments to support their needs if they are to advance their projects. They may need to potentially team up with legal and/or IT departments to deliver “joined up” solutions to complex issues. Cases that are built around delivering key benefits and measurably increased efficiencies to a company are far more likely to be given priority and proper funding, rather than vague assertions of the dangers of non-compliance.

Despite these obstacles, RM professionals will need to move forward regardless and the practical advice that Ovum has been recently offering its clients runs along the following lines:

**Be sympathetic and listen to the needs of end-users.** End-users are the ones who have to work with the information, and they usually know best. But users need guidance as to what is a record, how taxonomies will be structured, how data and records will be categorized, etc. The bottom line on ERM is that some data or records need to be flagged for retention, and others do not. If users do not actively participate in this flagging process then the system will become irrelevant. Though some software systems now attempt to automate some of this flagging activity, those systems are far from perfect and will typically require human input to ensure that things are running smoothly. Whatever tools one uses to classify records, end-users will always be the first line of the company's RM program, and clearly defined, mandatory procedures will need to be in place and fully understood by users.

**Be aware of regional issues.** Users not based in North America have expressed deep dissatisfaction with RM software, and believe that vendors only pay lip service to non-U. S. issues, viewing RM solely in a North American context. Standards vary worldwide, so too does the status and expertise of records managers. Many software solutions are focused on the DOD 5015 standard, yet this is not a de facto global standard. Methodologies and practices vary from country to country, and domain experience is of great importance if successful relationships are to develop between software vendors and their global clients. As more companies operate in a globally distributed and traded manner, regional issues need to be considered when rolling out RM projects. Experience to date has suggested that particular care has to be taken to ensure that software is selected that meets detailed regional practices as well as more generic or U.S.-centric methodologies.

**Compliance should not be your main driver.** Despite a mass of press and discussion that suggests the contrary, at Ovum we do not think that compliance issues are as big a driver for RM implementations as we are led to believe. From interviewing practitioners around the globe on this issue, we feel sure that the main driver for most RM implementations is clearing clutter and increasing the transparency of information. Ultimately, the pay-off is about delivering better information faster, and to the right people. Records management projects are often simply sub-projects of broader ECM or information management initiatives. Despite the type surrounding Sarbanes-Oxley and various SEC rulings, compliance is not currently a major driver for

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# Records Management: More than Technology

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sales, although it has raised the profile of some vendors and RM practices.

**You may not need software.** New regulations such as Sarbanes-Oxley and Basel II have certainly given reason to push companies into becoming compliant in a way that was previously unimaginable. In the case of Basel II, it means potentially severe restrictions on how much risk a bank can commit to, and in the case of Sarbanes-Oxley, non-compliance could result in a prison sentence. After the Enron and WorldCom fiascos, keeping and managing proper records should be considered a serious matter. Even so, many organizations do not look towards technology to help pin this respect. A recent poll of CFOs in North America revealed that 40% did not think compliance hinged on IT, and 23% thought that IT could play a part, but that existing systems could be easily adapted. This is not very encouraging for those trying to build a business case to buy new records management software.

The CFOs are probably right, and our interactions with RM professionals indicate that a focus on procedure and process should take a higher priority than technology. But electronic systems rather than paper-driven systems are becoming the dominant form of information storage and management. Without a full understanding of that electronic environment, it will be difficult to improve procedures and processes.

## The Rise of the RIM

The ARMA International conference in Boston (October 2003) echoed this theme, and discussions with end-users and vendors at the event illustrated further the current divergence of interests and objectives. Vendors and many RM practitioners are keen on elevating the status of RM within their organizations. Many of these end-users now refer to themselves as RIM (records and information management) specialists and are angling for a pivotal role in the management of information.

Vendors clearly want this to happen too, as this will open up a new buying point for their products. However, at some point reality has to come into play, and records managers are unlikely to be raising their status in commercial and public settings, and advising senior management directly on policy issues, although there are many good reasons they should.

Messages from records managers, or RIMs, are falling between the gaps, and their calls for better information management and the implementation of solid policies and procedures are largely going unheard. Eventually these RM groups may need to reposition their efforts to influence legal and IT departments and learn to more effectively articulate their business value.

This is not meant to be disparaging about the role of RM professionals, simply to sound a note of caution. RM has for many years been a back-office activity that has garnered few headlines. For it to move out of the closet and more into the open, alliances will need to be built with power-brokers within the organization, the CFO and CTO's offices along with those charged with bringing business change, be they internal groups or outside consultants. RIM professionals must become persuasive lobbyists, and business-oriented, if they are to gain the ear of those who hold the purse strings and make strategic decisions. This work can be helped by professional organizations such as AIIM and ARMA International taking on a more lobbying and education role, but ultimately the work will have to be done by RIM's themselves.

## In summary

The images of paper falling from the windows of the twin towers of the World Trade Center on September 11, 2001 have impressed themselves onto people's psyches in a powerful and terrible manner. This tragic set of events, followed closely by the fraudulent debacles at Enron, Tyco and WorldCom, and the imposition of the Sarbanes-Oxley Act, has meant that auditing and, by default, records management is for once starting to be taken seriously.

That said, RM is still viewed as a back-office activity, albeit one that has a somewhat higher profile than before. The question of whether it should remain a separate activity within the organization is central to its future. Rightly or wrongly, at a technology level RM is rapidly becoming simply another activity in broad ECM suites. And often RM is simply seen as an important side activity in data and document management. At Ovum we believe this to be the right approach, that RM should always be viewed in context with all of the other information management activities within an organization. At the same time, the unique skills and methodologies that RM professionals bring are invaluable to a successful project.

The spotlight and excitement around Sarbanes-Oxley and all the other regulations suddenly hitting the headlines will not last. Therefore RM professionals need to take advantage of their moment in the sun and capitalize on the current interest. They also need to take the opportunity to align their activities further up the corporate food chain and ensure that their value and strengths are forever recognized.

Alan Pelz-Sharpe (aps@ovum.com) is vice president, Software and Services for Ovum (www.ovum.com) in Boston, and a member of Ovum's knowledge management and information management research team.

Article appeared in AIIM-eDoc magazine, April/June 2004.

## Distance Learning

## ISG



**Education Corner**  
by Benay Berl

Recently a question was posed on the records management listserv, regarding college degree's offered in the field of records management. Although there are a few undergraduate degrees or certificates programs offered by universities in the US and Canada, the pickens are slim at best.

That set me to thinking; If I were to put together a degree or certificate program in records management, what would I include in the course work. I posed that question to the listserv and have listed the responses below. If you would like to add to the suggested courses, email your choices to me at [bberl@olivenhain.com](mailto:bberl@olivenhain.com).

Here is another thought - When you hire records management personnel, what type of course work would you like that person to have completed. Keep in mind that you may be looking for a clerk or a manager. Send your suggestions to me at [bberl@olivenhain.com](mailto:bberl@olivenhain.com)

I will let you know the suggestions and thoughts sent to me in the next newsletter issue.

### **LIST OF POSSIBLE COURSE WORK FOR A DEGREE IN RECORDS MANAGEMENT**

Litigation Support Strategies  
Policy/procedure manuals  
The business case – top mgt support  
Archival program laws retention destruction preservation  
Database design  
File plan  
Retention schedules  
Program management – how to advocate for your program, submit and defend budget request, start up and complete your project

Benay Berl  
Education Chair  
San Diego ARMA Chapter

*The next best thing to knowing something is knowing where to find it*

*-Samuel Johnson*



**ISG**  
by Tracee Hughs



San Diego ARMA is proud to announce it's first Industry Specific Group—LEGAL

### **What is ISG?**

ISG stands for Industry Specific Group. Each ISG addresses the needs of a specific industry.

### **Who is ISG for?**

Anyone who is interested in establishing a network of professionals working in similar industries facing similar needs.

### **Why would you want to participate in an ISG?**

An ISG is a group formed to focus on the specific needs of a particular industry (i.e., Legal Services, Government, Utilities, Pharmaceutical, to name a few). The ISG program provides a forum to exchange the information for the benefit of all.

### **How do you find out more about ISG?**

Contact the ISG coordinator, Tracee Hughs, [thughs@rdblaw.com](mailto:thughs@rdblaw.com) or visit the Education and ISG table at the next ARMA meeting.

### **When does the ISG—Legal meet?**

ISG Legal will meet at 11AM on normal meeting dates at the Education / ISG table outside the meeting room.

*I facilitate change.*

*I protect vital assets.*

*I ensure compliance.*

*I reduce risk.*

*I manage information.*

## **I AM A RECORDS MANAGER**

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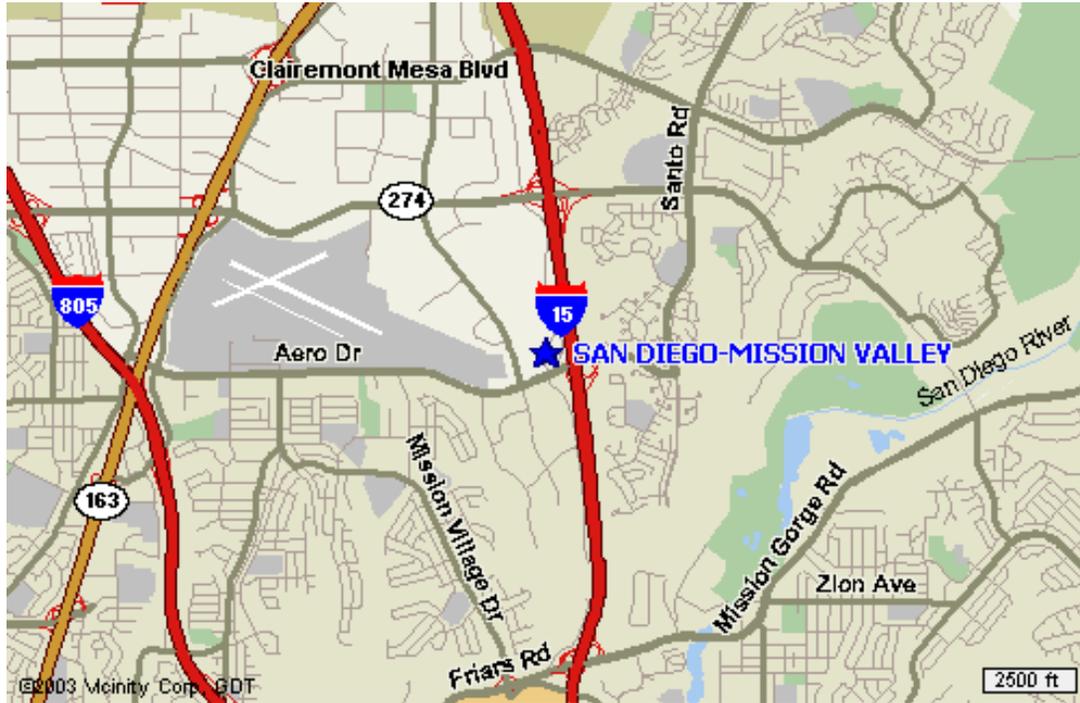
1-800-899-IRON [www.ironmountain.com](http://www.ironmountain.com)

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# September Registration Form

(Continued from page 1)

**Holiday Inn**  
3805 Murphy Canyon Road  
San Diego, CA 92123  
858-277-1199



**To Register:** FAX this form to [Linda Maczko](mailto:lmaczko@ucsd.edu) at (858) 534-6523, or Call Linda @ (858) 534-3395, or Email : [lmaczko@ucsd.edu](mailto:lmaczko@ucsd.edu) **NO LATER than 3:30 p.m., Friday, September 10, 2004.** Cancellations later than 48 hours prior to the event will be billed to the person registered. *If not sending advanced payment, cash or check payment required at registration.*

Lunch (please circle)	Member \$25.00	Non-Member \$30.00
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Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX : \_\_\_\_\_ EMAIL : \_\_\_\_\_

# FYI

Here's the URL to a very important site—the **Chapter Connection** on the ARMA International Website!!

Go to <http://www.arma.org/intranet>

Click on Chapter Connection  
Check out this URL to find out about

## ARMA Webinars / Calendar of Events

<http://www.arma.org/resources/calendar.cfm>

## FREE TRAINING CLASSES!!

Centers for Education and Technology (CET), a part of the San Diego Community College District, is offering free training classes in a wide range of topics. Their Business courses include offerings in HTML, XML, JavaScript, Linux, Visio, MS Office, and many others. These courses are offered at several campuses throughout the city.



Information Technology include offerings in Java programming, UNIX, Cisco, Oracle, A+ Training, TCP/IP, and many others. These courses are offered at campuses throughout

Please take a look at their web site, <http://www.sandiegocet.net/index.php>, for class and registration information.

Check out vital information you might have missed! [http://www.arma.org/learning/seminar\\_archive.s.cfm](http://www.arma.org/learning/seminar_archive.s.cfm)

This is a link to ARMA Audio and Web Seminars that you might have missed.

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The ARMA Conference for 2004 is in Long Beach, CA.

**CHECK IT OUT!!**  
**Make your plans now!!**



## ARMA Information

- [Compliance/Risk Management](#)
- [Electronic Records](#)
- [Legal/Regulatory Issues](#)
- [Privacy](#)
- [Records/Info Management](#)
- [Standards/Best Practices](#)

New Online Courses: Issues and Approaches in Archiving Electronic Records. ARMA's new online course will introduce you to the unique issues inherent to archiving electronic records. Learn about the strengths and weaknesses of various approaches to electronic records archiving, as well as recommendations for electronic archival processes and systems. Now available in the [ARMA Learning Center](#).

## Useful Links



<b><u>San Diego ARMA Board Meetings</u></b>
August 18
October 20
January 19
March 23
May 18

# MEMBERSHIP



## Membership Corner

By Linda Maczko

**H**ello, I am finishing up my first year as the Membership Chair. We have had some members leave and several new members join us this year. I would like to welcome all our new members and look forward to their participation in our local chapter meetings. Even with all the comings and goings, our membership has stayed pretty constant. I hope that next year we can reach out to our

colleagues in business, government, law, pharmaceutical research and computer technology to share information about Records Information Management and ARMA. You can help our chapter grow by the power of one. So if you bring a friend to our next luncheon, and maybe they'll tell two friends, and so on, and so on. Looking forward to the coming year.



See you there.

Linda Maczko

Membership Co-Chair

### 2004-2005 Meeting Programs

September 15

November 17

February 16

April 20

June 15



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