The San Diego Chapter of ARMA International is pleased to announce our inaugural program of the fiscal year. This year’s programs will help us leverage our current positions in the Records and Information Management profession in preparation for the future of Strategic Information Management.

The Chapter is very fortunate to have John J. Isaza, Esq. as our guest speaker. Mr. Isaza is Senior Consultant responsible for the legal and regulatory information services division of the Records Improvement Institute. He is a legal strategist, business development executive and proven leader with a slid background in business transactions, finance, jury trials and mediation negotiations.

As an experienced attorney and trial lawyer Mr. Isaza has been co-chair of major multi-million dollar jury trials on environmental and business disputes and first chair of major construction defect trials. He holds a Juris Doctorate from Boston College Law School and a BA in Speech and Communications from the University of Florida. He is a Board Member of the Boston Chapter of ARMA, and currently serves on the Program Committee. He is a frequent speaker at domestic and international lectures and seminars for universities, businesses and government entities, including ARMA International and various local ARMA Chapters.

A primary issue that records managers must consider is whether and how electronic documents can be admitted in a court of law, arbitration or mediation. Mr. Isaza will discuss the particular challenges that judges, lawyers and companies face in having particular types of documents admitted in court, including e-mails, word, excel or power point documents, imaged documents, and enterprise planning systems. The audience will benefit from learning the primary legal issues to consider in determining retention of electronic documents.

Mr. Isaza will draw on his vast experience as an arbitrator and trial attorney of complex business litigation matters to attain two primary objectives:

1) To introduce the audience to the behind-the-scenes technicalities that determine how a document winds up as an actual exhibit in a court of law; and,

2) Based on the foundation set by number 1, to walk the audience through the decision making process involved in admitting critical records, primarily electronic, into evidence.

MEETING AGENDA

11:30 - 12:00 Registration and Networking

12:00 - 12:15 Chapter Meeting

12:15 - 1:30 Lunch and Keynote

(Continued on page 13)
President’s Message

As your newly elected president I would like to begin this year by thanking our past President, Richard Berlin, for a great past year. It is because of him that a strong management team is assembled to bring an informative and fun year of records management activities. Additionally, he has agreed to stay on the board and help chair the program development committee. His vast knowledge of the field and the people in it will further enhance this organization’s ability to deliver quality programs for the membership.

THE PLANNING SESSION

Our organization got off to a great start with a Saturday planning (Thanks Benay Berl for hosting us at your home). Patsy Bell, Secretary, was instrumental in keeping the group on target with the appropriate voting and recording of what went on. Susan Roberts, VP, put the planning documents together and had a three-ring binder with our agendas and discussion. Her willingness to fill in where needed (her motto—“Here to HELP—anyone/anytime”) is a real plus for us.

The planning meeting also included Steve Greer, Pacific Coast Region Coordinator. San Diego ARMA is one of sixteen chapters of the Pacific Coast Region. The Pacific Coast Region is one of ten areas in ARMA International. Steve has extensive experience in ARMA, and our group was fortunate to have him down to help participate in our planning session. He was instrumental in bringing information to the table and very helpful in our discussions.

Our group reaffirmed the mission statement of our San Diego ARMA organization:

To provide a forum where professionals can meet, participate and further their knowledge in Records and Information Management practices and principles in a social environment.

Our organization was very lucky to have Terry Coan, past International ARMA President, kick off our theme by introducing the concept of managing an organization’s information as an asset. He divided that concept into six main areas:

- Maintain existing records (preservation, storage, retrieval, retention)
- Monitor (Audit, due diligence checklists, compliance, performance measuring)
- Forecast (Information business design, enterprise modeling, info structure planning)
- Protect (Privacy, security, continuity planning, data ownership, intellectual property)
- Validate (Intellectual property, risk management)
- Leverage (Knowledge management, information based business analysis, workflow analysis, business process reengineering, content management, data mining, customer relationship management)

We have planned five major events for this coming year with the culmination of 1/2-1 day event March 20, 2003. The approach for the speakers this year is to have all the speakers relate their talk to a central theme, “Managing Information as an Asset.” The five major events will be drawn from the six areas that have been listed. These parameters will be used to solicit speakers. Richard Berlin and Susan Coner are the program chair team that will make this happen as us. This year’s speakers are a critical part of our entire program – it will be an exciting and challenging year.

Another important item was to keep costs as low as possible. Our organization has been faced with some financial challenges due to several delinquent accounts. There are a couple of ways our local organization receives funds for operation; namely, a portion of the fees paid by the members (a portion goes to ARMA International and a portion goes to our local chapter), advertising in our newsletter, “Off the Record,” selling vendor tables at the luncheons, raffles, and holding a workshop/luncheon for the membership. Several key people were instrumental in getting the past debts due: our VP, Susan Roberts, Jennifer Public Relations, and Robert Zornado, Treasurer.

It was also decided that to further keep costs down that we should consider moving our luncheon meeting to a new hotel. A special task force headed by our Hazel Viagedor and Candee Sanchez (Hospitality Chair team)
Planning the San Diego ARMA Year

brought several proposed hotels for consideration. Susan Roberts, VP, further added a couple of hotels and helped organize the review for our planning session. The organization adopted Hazel and Candace’s recommendation for the Courtyard Marriott in Kearny Mesa. We have been able to keep the cost of our luncheons to $25 per member. These fees will help pay for the room rental and retain the quality speakers for this year.

Another major objective for our organization is to conduct a records management article contest. This is managed by Benay Berl (Educational Chair) and coordinated with the records management classes at Mesa College. The proceeds from our raffle go to support the prizes to the several finalists. Awards will be given in June 2003.

Trey Williams (Membership Chair) reported that we have 78 members in our local chapter. Our goal is to increase that number by 10%. The newsletter, “Off the Record” will be edited by Cynthia Lacy (Newsletter Chair) and will be our main source of information. Other sources of information will be flyers on upcoming programs and our website, www.sandiegoarma.org.

One of the final points the Board voted on was to charge $50 to www.arma.org/members and select “Update My Profile” so it is now one of the President’s goals to incorporate San Diego ARMA chapter. Several chapters in our region have offered their help and I will be coordinating with them over the next couple of months.

With a Hawaiian theme of Aloha (“The presence of divine breath” – used for hello and goodbye) and Mahalo (“May you be in Divine Breath” – used for thank you) the conference offered a chance to get materials and ideas for the board members.

ARMA International set up the region coordinators to help local chapters with organization and operation. I went with three points; more support from the ARMA International team, in particular with the setting up of our Corporation’s by-laws; establishment of a quarterly teleconference with Presidents of our region; and the establishment of a clearinghouse for speakers.

ARMA International is in the process of setting up an on-line speakers pool on their website, www.arma.org. Melanie Edens, ARMA Member Services, listened to our items, requested changes and what our organization needs. She also spoke about the “Chapter Connections” on the Internet at www.armapacific.org/intranet and how each chapter can submit items on a weekly basis. Check it out on Mondays.

There are about 10,000 people in ARMA International. Email and mailed voting instructions have gone out to vote for the new ARMA International President. As a result Glode Crawford is the President-elect for 2002-03 and is now serving. Terrence J. Coan, chair of ARMA International’s Election Management Committee announced the results. It seems that only 1,950 out of 10,195 (19%) voted. If you would like to participate in the voting via an e-ballot, you need to go to www.arma.org/members and select “Update My Profile” link in the Online Member Resources area. The next election is October 31. If you have any questions contact Cindy Lauchbaugh, ARMA’s director of communications, at claunch@arma.org.

San Diego ARMA is one of the last local chapters to incorporate so it is now one of the President’s goals to incorporate San Diego ARMA chapter. Several chapters in our region have offered their help and I will be coordinating with them over the next couple of months.

The Pacific Coast Region has a website, www.armapacific.org that lists all the chapter’s meetings with (Continued on page 4)
speakers. Everyone can view the speaking schedule.

At the awards banquet our local chapter was honor with the "Outstanding Educational Seminar and Excellent Year Program." The impression that one gets from ARMA International is that they are trying hard to understand the membership’s needs and put together an organization that will really help. Please help by participating in any voting or surveys sent to you. The results just might possibly help in one’s career advancement, understanding records management better, and give you a chance to meet and network with some very special people.

(Continued from page 3)

Planning the San Diego ARMA Year

Terry Coan, our June speaker and Richard Berlin, our Past President with their Dave giving his presentation during the conference.

Graduating Class of 2002 for the ARMA Pacific Coast Region

A Trial Lawyer’s Take on the Admissibility of Electronic Records

To Register: FAX this form to Trey Williams at 858-679-7341, or call Trey at 858-748-1100, x209, via Email: twilliams@corovan.com, NO LATER than 3:30 PM, Monday, September 16. Cancellations later than 48 hours prior to the event will be billed.

Lunch (please circle) Member: $25.00 Non-member: $35.00

Name ___________________________ Organization ___________________________

Phone ___________________________ FAX ___________________________ Email ___________________________
What is an ISG?

Whatever your line of work - business, industry, municipality, government agency, foundation, institution or not-for-profit organization - there’s an ARMA ISG to help you solve records and information management problems. How? By linking you with other records managers and administrators throughout your industry.

What is an ISG?

ISG stands for Industry Specific Group. There are currently over 30 ISGs sponsored by ARMA International (the Association of Records Managers and Administrators, Inc.) This number can change, and does, based on the expressed needs of our members.

Each ARMA ISG addresses the needs of a specific industry. From banking to health care to utilities, from criminal justice to manufacturing to transportation. (Please refer to back panel for a complete listing.) And since ISGs function beyond the local level, you have access to a wide spectrum of help and information.

Why the Need for ISGs?

The professional needs of records/information specialists are as diverse as the industries they represent. That's why ARMA International established ISG - program: to link those specialists with other professionals sharing the same interests.

What are ISG Benefits?

As a records specialist, you profit each time you add to the wealth of information you already command about your particular business or industry. At the same time, the information you command may assist others. ISG membership provides the forum to exchange this kind of information for the benefit of all.

Important? Vital! Innovations, procedures and compliance requirements change quickly. One person or group of persons in a single organization - no matter how talented - simply can’t keep pace. Unless you have unlimited funding for information and records management research, communication with your counterparts in an ISG is not a mere benefit. It’s a survival tactic.

Learn to be a Leader

Taking a role as a leader or co-leader of your ISG provides a real opportunity to gain leadership skills and stature. Leading an ISG expands your vision beyond your job and beyond your chapter.

Career Advancement

Improved communication with industry counterparts places members in the enviable position of knowing where career advancement opportunities lie. Insights and pre-published information obtained as a result of ISG involvement can help you advance within your company or agency as well as provide other areas of fulfillment.

Networking

An ISG provides contact with other records and information specialists in a particular industry as well as with the membership of ARMA International. It’s undoubtedly the most in-depth responsive network available. ISGs produce directories and newsletters to assist members in networking.

Regulatory/Legislative Awareness and Influence

Your ISG membership also helps keep you current on legislation and how it can affect your work. Additionally, ARMA members will be assisting the U.S. federal government with the implementation of the Paperwork Reduction Act of 1995. Because of ARMA International’s ongoing relationship with OIRA, the Office of Information and Regulatory Affairs, ARMA membership specific industries will be asked to comment on paper-work regulations that affect their industries.

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How ARMA Supports Your ISG

ARMA headquarters supports the ISGs with a full time professional: a Special Interest Programs Coordinator. This coordinator assists ISGs with arrangements for meetings and mid-year seminars, and with printing and distributing ISG newsletters, rosters and other information vital to the assistance of ISG members.
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Publications like these—targeting the problems and the opportunities within specific industries—can be of immense value to a records manager. Furthermore, working within an ISG gives you an opportunity to assist in developing such publications.

Be part of your ISG

If you have not been taking advantage of your ISG and its network of knowledge, you can start at any time. Contact your ISG or call the Special Interest Programs Coordinator with any questions you may have on ISGS.

Managing Information as an Asset

Leverage Valued Project Forecast Monitor Maintain

Knowledge Management Intellectual Property Privacy Information Based Business Design Information Auditing Preservation

Risk Management Security Enterprise Model Infrastructure Due Diligence Checklists Storage

WorkFlow Analysis Continuity Planning Infrastructure Planning Compliance (contract-policy)

Business Process Reengineering Data Ownership Performance Measuring Retention

Content Management Intellectual Property

Customer Relationship Management

2002-2003 Meeting Programs

November 20, 2002
January 23, 2003
March 20, 2003 1/2 Day Seminar
June 19, 2003 Final Luncheon for the year

Slide from Terry Coan’s presentation at the last ARMA meeting in June. This details everything that’s involved in a good records management scenario. The main point Terry made is that information is an asset and should be treated as such.

To join an ISG, please choose one of the Industry Codes shown above and enter if on your membership application form.
What is an ISG??

Leadership for the Industry Specific Program

The process of selecting leaders for the Industry Specific Program begins each year when a blue application form is sent to all ARMA members with the March issue of News, Notes & Quotes. The form must be returned by April 30. From those applications the President Elect appoints the ISP Chairman who along with the Assistant Chairmen provides leadership for the overall Industry Specific Program. The ISP Chairman begins serving as of July 1 and appoints individuals to the following leadership positions:

- ISP Chairman
- ISP Assistant Chairman (3)
- ISG Managers (11)
- Industry Leaders (33)
- Industry Co-Leaders (33)
Why Records Management is Important Today

Imagine this: You have been dreaming about going to college and you get very excited when you get the acceptance letter from the university you applied for. You know you are going to make your family very proud because you will be the first one in the family to attend college. Your family is very poor though and the only way you can attend college is if you get financial aid. You submit your application to the financial aid office and after looking at your application the clerk says that she doesn’t see any reason why you wouldn’t qualify. You go home with a smile on your face. A month goes by and you haven’t heard anything from the financial aid office. You decide to call them. The financial aid clerk on the phone tells you that they have lost your paperwork and there is nothing they can do about it. She asks you to submit your application again to be considered for next year since this year’s deadline has already passed. You are crushed. You will have to wait a whole year to attend college. Your dream is shattered.

Today’s society produces more and more information that needs to be recorded. Some of the reasons why we have become an information society are the growing number of white-collar workers whose jobs are based on recorded information, the complexity of government and business activities, increased government regulations, growth of information-intensive service industries and the huge increase in the use of computers, photocopiers and printers in offices. In the 1980’s people talked about a paperless office that computers would help to achieve. Today we know the paperless office was just a dream. According to Declan Treacy, the author of Clean Your Desk, computers produce 2.5 million sheets of paper every minute, 60 million pages are duplicated every hour, and 30 billion faxes are sent every year. These numbers were published in 1991 so can you imagine what these same figures are now? It can’t be emphasized enough how important records management is today.

Cost

Every business wants to cut down expenses and increase revenues but many managers don’t realize how much money they lose just because of the company’s poor records management. One of the most basic reasons to have a good records management program is that it saves valuable time. Employees spend less time locating and retrieving information and they don’t waste time on locating misplaced or lost files. All this increases productivity and in many cases productivity equals money. It is estimated that a misplaced record can cost as much as $150 in terms of time spent looking for the record.

A well-implemented records retention schedule also helps the company to save money. Old, inactive records can take a lot of space. If these records occupy already expensive office space, it can get very costly for the company. Old records are not useful for the company anymore and are not required to be kept by law should be destroyed to free up space. Other inactive records should be stored in an offsite storage facility as the cost is considerably less. A company can conserve up to 40% of the space occupied by records just by destroying unnecessary and duplicate records.

(Continued from page 8)
Imagine this: You have been dreaming about going to college and you get very excited when you get the acceptance letter from the university you applied for. You know you are going to make your family very proud because you will be the first one in the family to attend college. Your family is very poor and the only way you can attend college is if you get financial aid. You submit your application to the financial aid office and after looking at your application the clerk says that she doesn’t see any reason why you wouldn’t qualify. You go home with a smile on your face. A month goes by and you haven’t heard anything from the financial aid office. You decide to call them. The financial aid clerk on the phone tells you that they have lost your paperwork and there is nothing they can do about it. She asks you to submit your application again to be considered for next year since this year's deadline has already passed. You are crushed. You will have to wait a whole year to attend college.

Records management is important today because it can have devastating effects on a company. It is not uncommon to be asked to provide hundreds of thousands or even millions of documents in a legal dispute. In the case of Transamerica Computer Company vs. International Business Machines Corp. in 1978, the defendant had to screen 17 million pages of it's own records in 90 days to find the ones pertaining to the case! It is also the document holder's obligation to organize and format the documents so they will be useful to the party requesting them. Sometimes companies have to hire additional help to find and organize all the records needed in a legal dispute because of the massive amount of paperwork and strict deadlines. The time spent finding records, the more money it costs to the company because of the legal costs and interference with doing regular business. When a company goes to trial there are several things that can happen if it hasn’t provided the necessary documents. A company may be penalized. In the case of proving its innocence, the company might lose just because it didn’t save the records that would prove the other party’s claims wrong. If the court or judge presumes something is true and the company doesn’t have the documents to show otherwise, the company loses the argument. In the worst case the company will lose the trial automatically if the court finds that relevant documents were destroyed on purpose after litigation began.

A sound records management program reduces expenses and increases efficiency. Accurate information that can be accessed in a timely manner is important in rapid exploitation of marketing opportunities. It also helps executing essential business transactions. Good record keeping practices can give a company competitive advantage over companies with poor or inefficient practices. What more needs to be said about the advantages of good records management to any business that wants to succeed?

(Continued from page 8)

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Vital Records

Important records can easily be lost and destroyed in events such as computer system breakdown, natural disaster, terrorist attack, theft or vandalism. The September 11 terrorist attack on the World Trade Center in New York is a perfect example: innumerable amounts of records were destroyed in a matter of minutes.

Vital records are those records that are crucial to the operation of the organization and continuation or resumption of operations after a disaster, or when recreating legal or financial status of the organization. Without its vital records an organization can lose millions of dollars or even go bankrupt. A large amount of time is also spent recreating records that were destroyed. Many big organizations have their vital records duplicated and spread in different locations, which makes a disaster recovery for them considerably easier. Unfortunately small businesses often have their vital records only in one location, and if something happens to the records in that location, there is very little chance the business can survive. That’s why it is so important to have a good vital records program as well as a disaster recovery plan.

Off the Record  September 2002  9
FYI

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ARMA International
The Information Management Professionals

Local Government Industry Specific Group (ISG)
Greater Los Angeles - Orange County - Upland Inland Empire - San Diego
Bakersfield - Central Coast - Silver State (Las Vegas) Chapters

Disaster Planning, Retention for Electronic Records in RIM Manual

Tuesday, September 10, 2002

The CITY of Long Beach

10:00 AM to 12:00 Noon

CITY HALL, 6th FLOOR CONFERENCE ROOM

Agenda

10:00 AM - 10:10 AM Introduction & Group Business
11:50 AM - 12:00 PM Closing & Future Meeting Planning
12:00 PM - 1:00 PM Lunch at the Blue Cafe (Broadway on the Promenade)

(Website address is [http://www.TheBlueCafe.com](http://www.TheBlueCafe.com))

Hosted by Jan Davey, City of Long Beach. Please RSVP no later than September 6, 2002 at JDavey@ci.Long-Beach.CA.US or (562) 570-6136.

This will be a roundtable discussion. Please feel free to invite staff from your respective organizations that might either contribute to, or benefit from the discussion. Please bring about 20 copies of any materials you would like to share with the group on our topic. We encourage a lively, productive exchange of expertise, so please think about what you might want to ask or contribute to the discussion. For those who can, we plan to go to lunch as a group immediately following the meeting.

Our meetings are free. If you receive a paper meeting notice, please help us save some trees by sending us your email address so we can email our meeting notices to you. Please send email addresses and changes of addresses to SteveCihlanany@internetpost.net (310) 937-4757. Please fax or email this notice to anyone you think might like to attend.

Contact Cynthia Lacy for more Information.
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If you have not been taking advantage of your ISG and its network of knowledge, you can start at any time. Forward to ARMA headquarters, Attention Membership, the $10 fee for each ISG code selected. Or call the Special Interest Programs Coordinator with any questions you may have on ISGS.

Consumer Services Group
Communications 35
Merchandising/Retail 26
Non-Profit/Not-For-Profit 38
Real Estate 22

Contracting Group
Consultants 04
Employment Contractors 07
Government Contractors 40

Microfilm Services 47
Records/Storage Destruction Facilities 39

Education Group
Educational Institutions 05
Educators 06

Energy Group
Environmental 03
Petroleum 32
Utilities 30

Entertainment Group
Film and News Media 03
Food, Beverage, Restaurants 41
Hotel/Gaming 15

Financial Services Group
Banking 08
Insurance 16
Securities/Investments 43

Government-Canada Group
Federal, Local or Provincial Government 10

Government—US Group
Defense 27
Federal Government 12
Local Government 09
State Government 11

Health Group
Health Care Services 19
Pharmaceutical 20

Legal group
Criminal Justice 21
Judicial Administration 23
Legal Services 17

Manufacturing Group
High Tech 14
Manufacturing 18
Transportation 28

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Managing Information as an Asset

Managing Information as an Asset

Leverage
Value
Project
Forecast
Monitor
Manage

Knowledge Management
Intellectual Property
Privacy
Information Based Business Design
Information Auditing
Preservation

Risk Management
Security
Enterprise Model Infrastructure
Due Diligence Checklists
Storage

WorkFlow Analysis
Continuity Planning
Instructure Planning
Compliance (contract-policy)
Performance Measuring

Business Process Reengineering
Data Ownership

Content Management
Intellectual Property

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November 20, 2002
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Day Seminar
June 19, 2003 Final
Luncheon for the year

San Diego ARMA Board Meetings
10/17 Iron Mountain
12/4 DISC
2/12 SDDPC
5/21 Corovan

Document Imaging Service Corporation
“The Paper to PDF Experts”
www.NoMorePaper.com
1-877-SCANNING
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Planning the San Diego ARMA Year

Terry Coan, our June speaker and Richard Berlin, our Past President with their Dave giving his presentation during the conference.

A Trial Lawyer’s Take on the Admissibility of Electronic Records

Please register early, as seating is limited. Don’t miss this unique opportunity to understand the critical foundation of admissibility of electronic records. This is a core topic of Strategic Information Management.

Join us on September 19th at our new meeting location: Marriott Courtyard – Kearny Mesa!

Graduating Class of 2002 for the ARMA Pacific Coast Region

Don’t miss this unique opportunity to understand the critical foundation of admissibility of electronic records. This is a core topic of Strategic Information Management.

To Register: FAX this form to Trey Williams at 858-679-7341, or call Trey at 858-748-1100, x209, via Email: twilliams@corovan.com, NO LATER than 3:30 PM, Monday, September 16. Cancellations later than 48 hours prior to the event will be billed.

Lunch (please circle)        Member: $25.00        Non-member: $35.00

Name ________________________________ Organization _________________________ Phone ______________________  FAX __________________ Email _________________
**Membership Corner**

by Trey Williams

Hi, everybody.

Please join me in welcoming myself to the membership chair of ARMA San Diego. Seriously though, this is my first year with our organization and I’m excited about it.

Here’s what I’ve experienced so far at ARMA luncheons: interesting people working in separate sections of the business world such as law, pharmaceutical research, computer technology and government, all sharing information. We are increasing and refining our knowledge on the subject of effective records and information management, and we’re learning from experienced professionals who have unique positions in business. ARMA is growing, and our growth gives us the resources to present expert lecturers to our members and friends.

So bring a friend to our next luncheon, and maybe they’ll tell two friends, and so on, and so on.

See you there,

Trey

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brought several proposed hotels for consideration. Susan Roberts, VP, further added a couple of hotels and helped organize the review for our planning session. The organization adopted Hazel and Candido’s recommendation for the Courtyard Marriott in Kearny Mesa. We have been able to keep the cost of our luncheons to $25 per member. These fees will help pay for the room rental and retain the quality speakers for this year.

Another major objective for our organization is to conduct a records management article contest. This is managed by Benay Berl (Educational Chair) and coordinated with the records management classes at Mesa College. The proceeds from our raffle go to support the prizes to the several finalists. Awards will be given in June 2003.

Trey Williams (Membership Chair) reported that we have 78 members in our local chapter. Our goal is to increase that number by 10%. The newsletter, “Off the Record” will be edited by Cynthia Lacy (Newsletter Chair) and will be our main source of information. Other sources of information will be flyers on upcoming programs and our website, www.sandiegoarma.org.

One of the final points the Board voted on was to charge ARMA Member Services, listened to our items, requested changes and what our organization needs. She also spoke about the “Chapter Connections” on the Internet at www.arma.org/intranet and how each chapter can submit items on a weekly basis. Check it out on Mondays. There are about 10,000 people in ARMA International. Email and mailed voting instructions have gone out to vote for the new ARMA International President. As a result Gisele Crawford is the President-elect for 2002-03 and is now serving. Terrence J. Coan, chair of ARMA International’s Election Management Committee announced the results. It seems that only 1,950 out of 10,195 (19%) voted. If you would like to participate in the voting via an e-ballot, you need to go to www.arma.org/members and select “Update My Profile” link in the Online Member Resources area. The next election is October 31. If you have any questions contact Cyndy Launchbaugh, ARMA’s director of communications, at claunch@arma.org.

San Diego ARMA is one of the last local chapters to incorporate so it is now one of the President’s goals to incorporate San Diego ARMA chapter. Several chapters in our region have offered their help and I will be coordinating with them over the next couple of months.

With a Hawaiian theme of Aloha (“The presence of divine breath” – used for hello and goodbye) and Mahalo (“May you be in Divine Breath” – used for thank you) the conference offered a chance to get materials and ideas for the board members.

ARMA International set up the region coordinators to help local chapters with organization and operation. I went with three points; more support from the ARMA International team, in particular with the setting up of our Corporation’s by-laws; establishing a quarterly teleconference with Presidents of our region; and the establishment of a clearinghouse for speakers.

ARM International is in the process of setting up an on-line speakers pool on their website, www.arma.org.

Melanie Edens, ARMA International, in attendance.

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The Pacific Coast Region has a website, www.armapacific.org that lists all the chapter’s meetings with (Continued on page 4)
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President's Message

As your newly elected president, I would like to begin this year by thanking our past President, Richard Berlin, for a great past year. It is because of him that a strong management team is assembled to bring an informative and fun year of records management activities. Additionally, he has agreed to stay on the board and help chair the program development committee. His vast knowledge of the field and the people in it will further enhance this organization’s ability to deliver quality programs for the membership.

The Planning Session

Our organization got off to a great start with a Saturday planning (Thanks Brenay Bert for hosting us at your home). Patsy Bell, Secretary, was instrumental in keeping the group on target with the appropriate voting and recording of what went on. Susan Roberts, VP, put the planning documents together and had a three-ring binder with our results, minutes, and discussion. Her willingness to fill in where needed (her motto—“Here to HELP—anyone/anytime”) is a real plus for us.

The planning meeting also included Steve Gray, Pacific Coast Region Coordinator. San Diego ARMA is one of sixteen chapters of the Pacific Coast Region. The Pacific Coast Region is one of ten areas in ARMA International. Steve has extensive experience in ARMA, and our group was fortunate to have him down to help participate in our planning session. He was instrumental in bringing information to the table and very helpful in our discussions.

Our group reaffirmed the mission statement of our San Diego ARMA organization:

To provide a forum where professionals can meet, participate and further their knowledge in Records and Information Management practices and principles in a social environment.

Our organization was very lucky to have Terry Coan, past International ARMA President, kick off our theme by introducing the concept of managing an organization’s information as an asset. He divided that concept into six main areas:

- Maintain existing records (preservation, storage, retrieval, retention)
- Monitor (Audit, due diligence checklists, compliance, performance measuring)
- Forecast (Information business design, enterprise modeling, info structure planning)
- Protect (Privacy, security, continuity planning, data ownership, intellectual property)
- Valuate (Intellectual property, risk management)
- Leverage (Knowledge management, information based business analysis, workflow analysis, business process reengineering, content management, data mining, customer relationship management)

We have planned five major events for this coming year with the culmination of 1/2-1 day event March 20, 2003. The approach for the speakers this year is to have all the speakers relate their talk to a central theme, “Managing Information as an Asset.” The five major events will be drawn from the six areas that have been listed. These parameters will be used to solicit speakers. Richard Berlin and Susan Conner are the program chair team that will make this happen. This year’s speakers are a critical part of our entire program— it will be an exciting and challenging year.

Another important item was to keep costs as low as possible. Our organization has been faced with some financial challenges due to several delinquent accounts. There are a couple of ways our local organization receives funds for operations; namely, a portion of the fees paid by the members (a portion goes to ARMA International and a portion goes to our local chapter), advertising in our newsletter, “Off the Record,” selling vendor tables at the luncheons, raffles, and holding a workshop/luncheon for the membership. Several key people were instrumental in getting the past debts due: our VP, Susan Roberts, Jennifer Pol, Public Relations, and Robert Zornado, Treasurer.

It was also decided that to further keep costs down that we should consider moving our luncheon meeting to a new hotel. A special task force headed by our Hazel Viagedor and Candace Sanchez (Hospitality Chair team)
The San Diego Chapter of ARMA International is pleased to announce our inaugural program of the fiscal year. This year’s programs will help us leverage our current positions in the Records and Information Management profession in preparation for the future of Strategic Information Management.

The Chapter is very fortunate to have John J. Isaza, Esq. as our guest speaker. Mr. Isaza is Senior Consultant responsible for the legal and regulatory information services division of the Records Improvement Institute. He is a legal strategist, business development executive and proven leader with a slide background in business transactions, finance, jury trials and mediation negotiations.

As an experienced attorney and trial lawyer Mr. Isaza has been co-chair of major multi-million dollar jury trials on environmental and business disputes and first chair of major construction defect trials. He holds a Juris Doctorate from Boston College Law School and a BA in Speech and Communications from the University of Florida. He is a Board Member of the Boston Chapter of ARMA, and currently serves on the Program Committee. He is a frequent speaker at domestic and international lectures and seminars for universities, businesses and government entities, including ARMA International and various local ARMA Chapters.

A primary issue that records managers must consider is whether and how electronic documents can be admitted in a court of law, arbitration or mediation. Mr. Isaza will discuss the particular challenges that judges, lawyers and companies face in having particular types of documents admitted in court, including e-mails, word, excel or power point documents, imaged documents, and enterprise planning systems. The audience will benefit from learning the primary legal issues to consider in determining retention of electronic documents.

Mr. Isaza will draw on his vast experience as an arbitrator and trial attorney of complex business litigation matters to attain two primary objectives:

1) To introduce the audience to the behind-the-scenes technicalities that determine how a document winds up as an actual exhibit in a court of law; and,
2) Based on the foundation set by number 1, to walk the audience through the decision making process involved in admitting critical records, primarily electronic, into evidence.

MEETING AGENDA
11:30 - 12:00 Registration and Networking
12:00 - 12:15 Chapter Meeting
12:15 - 1:30 Lunch and Keynote

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