The San Diego Chapter of ARMA International is pleased to announce our next program that will enhance your communication and management skills.

This session will improve your ability to implement and coordinate Records and Information Management programs throughout your organization.

The Chapter is very fortunate to have Ms. Sheryl Roush - Professional Speaker, International Trainer, Author and Coach. Sheryl Roush is an internationally top-rated trainer and sought-after professional speaker, known for her high-energy presentations. She consistently brings audiences to their feet!

This program supports all levels of management and the accuracy in giving and receiving instructions and directions. Participants have fun while learning advanced, yet simplified communication skills - proven from the latest research in the field.

You will learn:

- how to meet people on THEIR level
- techniques to establish instant rapport and respect
- how to give instructions so they are understood
- 7 Multiple Intelligence modalities
- advanced listening skills and charisma builders
- teamwork, cooperation and interpersonal skills

Meeting Agenda
11:30—12:00 Registration
12:00—12:15 Chapter Meeting
12:15—1:30 Lunch & Keynote

Join us on January 30th at our new meeting location: Marriott Courtyard—Kearney Mesa!

Lunch will feature Chicken Piccata, Salad, Dessert, Coffee and Iced Tea.

For more information regarding vendor exhibit opportunities contact Jennifer Ota: (858) 554-1529 x240 or Jennifer.ota@ironmountain.com.

Please register early, as seating is limited.

RSVP to Trey Williams: (858) 748-1100 x209 or twilliams@corovan.com.

(Continued on page 13)
A Time for Reflection, a time to look to the Future

President’s Message
by David Taylor

We are now 2003! This is the start of a brand new calendar year and marks the midway point of our local ARMA chapter (fiscal year, July 1 – June 30). It is a time for reflection and also a time to look to the future six months.

Our chapter’s mission is: “To provide a forum which professionals can meet, participate and further their knowledge in records management practices and principles in a social environment.”

In July our all-volunteer team met as a group for the first time to plan the 2002-2003 year. We had several challenges; namely, finding a location for the lunch-eons, getting some past due payments from attendees and vendors, and planning the types of speakers for the upcoming year. With Patsy Bell, Secretary, our team was able to focus on discussion while she captured the necessary information for minutes and reference at a later date. Patsy is also responsible for our Chapter’s on-line voting and general administration.

We put together a list of issues, goals, and recommendations and created the plan for the year. We had a couple of issues and recommendation for ARMA International and these were voiced at the Pacific Region Leadership Conference in late July and then at the ARMA International Conference in September.

For the past several years we had been meeting at the Doubletree Hotel in Mission Valley but when the rates had gone up 20% over the past year this prompted us to look at alternatives. Hazel Viagedor and Candace Sanchez, both Hospitality/Awards co-chairs, Susan Comer, Programs Co-Chair, and Susan Roberts, Vice-President, scouted various alternative meeting sites. As a result we now have the business luncheons at a centralized location with the Courtyard Marriott hotel in the Kearny Mesa area.

After Robert Zornado, Treasurer, gave us the report on the financial challenges that our chapter faced the team focused on the establishing the necessary goals that our chapter would need to move forward. The team approved a $10/year increase – one that hadn’t increased in over a dozen years. The team also increased the luncheon price to $25 for members, $30/non-members to cover the cost of getting quality speakers. One of the big goals was to collect the back debts from advertising, people that reserved for lunch and did not show (our organization still has to pay for no-show lunches), and vendor display tables. A special “thank you” to Susan Roberts, Vice-President, and Jennifer Ota, Public Relations chair, for their efforts in collecting the revenue. The goal is to have enough money in the bank so the organization can send two of its Board.(Continued on page 8)
### ARMA International Conference New Orleans

#### International Day September 29, 2002

#### Attendees

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<tr>
<th>Whom</th>
<th>Country</th>
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<tr>
<td>Claudette Samuels</td>
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<tr>
<td>Sue Myburgh</td>
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ARMA International Conference New Orleans  
International Day September 29, 2002

PROCEEDINGS

WELCOME AND INTRODUCTIONS

Claudette warmly welcomed everybody and explained that this was the third International Day, which originally kicked off at Las Vegas. She described the day as very important, not only for the international community but also for all ARMA members who recognize the global economy in which we work. Everyone present was asked to introduce themselves. As an extension of the introductions various attendees gave a brief overview of the status of RIM in their respective countries as follows –

**Italy** – Sept 11 changed many things, security of records and information now very important, archivist’s only concentrate on historical records, two banks in good shape, however industry as a whole in bad shape, but things are slowly changing for the good.

**Malta** – RIM not readily acceptable despite efforts over the last 6 years, mainly archivist practices in place, Eastern Europe clamoring for info to address what was previously an archivist domain, best practice needed, situation a good opportunity for ARMA with knowledge and new technology

**Iceland** – by and large an archivist environment although ISO 1779 now coming into play

**Jamaica** – in the last 10 years good progress has been made, history of keeping everything, RIM practitioners frustrated, ARMA has brought changes with government career paths assisting private practice, multi-nationals bringing knowledge, Access to Information Act will affect the business environment, e-government poses a huge problem for the future

**Australia** – RIM very active and in good shape, ISO standards an example of activities, not primarily archive focused, electronic information important, and indigenous records receiving much attention at this moment in time

**South Africa** – by and large archivist (SASA) & librarians (SAILIS) are very active and organized, new initiative by South African Qualifications Association with Standards Generating Body writing up industry standards – challenge for RIM practitioners as focus is not primarily at the start of the records life cycle but the end, Promotion of Access to Information Act being implemented and causing consternation

**Mexico** – modus operandi based very much on culture of keep everything, same problems as the rest of the world are evident, must learn and be pro-active in order to achieve results

**England** – many countries have copied the UK system which now resides in the Public Records Office, however private industry does its own thing, they know where everything is but cant find anything, industry practitioners have received good training over the past couple of years, IT has not delivered, ISO 15489 offers great opportunity

**Switzerland** – international practice can be done across the world, litigation an issue of concern, USA not necessarily a safe haven for personal data

(Continued on page 5)
**Cayman Island** – archives in very good shape, record-keeping survey to be done shortly as part of a RIM workshop

**Belize** – RIM not very sophisticated other than in Central Bank and two Archivists in government, in general all practitioners are very interested, ARMA needs to reach out to smaller countries where there are opportunities

**Japan** – two major initiatives are the “Japanisation” of ISO 15489 and legislation to improve the poor level of RIM in government service which is “no record” the order of the day, government representative at ARMA this year to see importance

**Sri Lanka** – RIM practice very poor, handshake governs relationships and is key to managing business processes, no back-ups, records are stored in houses by appointed occupants but in bad conditions in terms of humidly, etc

**USA** – not as perfect as people think, possible to find all sorts of situations even those that exist in the international business environment

**AGENDA ITEMS**

**Larry Eiring**, SAE Section Steering Committee presented on the ARMA/ICA Partnership and Progress. Full details and other initiatives are contained in the presentation that is attached to the minutes submitted under e-mail. Further details can be obtained at [http://www.ica-sae.org](http://www.ica-sae.org) Under Q & A’s mention was made of training partnerships already tried and no interest shown by ARMA and the many distance learning opportunities in different places (Christine A), many e-learning opportunities are available (Sue M), NARA recent survey found that practitioners prefer coming to a venue and face to face presentation (Laurie S), ARMA certificate strongly recommended & Welsh university library and archiving opportunity raised (William P), distance learning expensive (Mike M), slides and presentations should be made available on ARMA website (Laurie S), inputs required from international community (Larry E)

Peter Herman Executive Director/CE ARMA International gave a brief overview of the “Letter from Las Vegas” and progress to date, as well as the ICA partnership and the results coming there out. There will be two joint ARMA conferences outside North America - Costa Rica and Singapore. The ICA Congress in Vienna will have significant ARMA participation.

A suggestion was made that the international community should consider a two day pre-conference in Boston 2003, primarily focused on the international situation and opportunities.

**Terry Coan** Chairman of the Board ARMA International spoke on the recent electronic voting process, which was also put in place to facilitate International members voting. As Chairman of the Board, he and the Board was very sensitive to the International community and the need for ARMA International to develop products and services to serve this community, as well as North American members who worked and participated in the international arena. He re-affirmed the Boards commitment to international issues & activities and pledged funding to some of these subject to the availability of finance. Each of us should take note that we have a responsibility to bring to the table issues, ideas and knowledge for the betterment of the RIM profession as a whole.
Sharon Alexander-Gooding Ambassador Caribbean /South & Central America gave a brief overview of the recent Global Forum meeting in South Africa on Corporate Governance in the Electronic Age which was attended by 56 national archivists and archival educators from around the Commonwealth. Focus was current strategies for IT, the impact of computerization on the nature of the official record and the experiences of national archivists within the changing technological environment. Working sessions were framed around - the importance of record keeping for good governance, electronic records, record keeping and governance, transparency and accountability in record keeping and the nexus between Access to Information, human rights and record keeping. It was recognized that with the advent of the widespread use of electronic records in national institutions, archivists, records managers and IT professionals must work together to develop strategies for the management and preservation of e-records and towards bridging the digital divide that still exists in many international societies. She also stressed the importance of the ARMA international community keeping abreast of trends across the globe, especially those which impact on how we keep and manage our respective records.

Vicky Lemieux, who until recently was part of the Global Forum, followed up with her perspective on the meeting from the perspective of World Bank funding which funds such projects in developing countries. The World Bank lends money to execute projects in such areas as financial, judicial and personnel record keeping. Several countries (India, Chile, Tanzania & Burkina Faso) have recently been part of an International Records Management Trust case study to determine and develop assessment tools that can be used in the future and encapsulate the knowledge core gathered.

Tony Nash Chairman ARMA International Educational Foundation spoke on the latest initiative to raise funds for the Education Foundation. This consisted of a “Pledge 500” which would consist of individuals pledging $100 a year for the next 5 years, which would raise $1 million. This money would be invested and only the income would be used to fund educational activities and opportunities.

Diane Carlisle ARMA International Professional Resources Director gave an overview of the work being done on standards and guides. There was a need for reviews by international practitioners and this could be done via the various websites such as http://www.ISO.org where a sub-committee on ISO 15489 was now looking at Metadata, Access Rules and a White Paper on RIM/IM/DM/WF relationships. If anyone was interested in this challenge then the route for ISO would be through their company as a representative or as an individual on an ARMA task force or review group. A couple of activities at present were an Electronic Imaging sub-committee, Electronic Record standard/specification via AIIM and a Vital Records standard out for public review and comments. Reference was also made to work on ISO 15081.

Sue Myburgh Ambassador Australasia then presented “Update on RIM in Australia”, presentation attached to the minutes submitted under e-mail.

Hidehiko Kobayashi ARMA Tokyo Chapter presented “The Status of Records and Archival Management in Japan”, presentation attached to the minutes submitted under e-mail.

CONCLUSION

Before breaking for the day and commencing on the on-site tour of the archives of the Archdiocese of New Orleans, Claudette thanked everyone present for making International Day a valuable learning and knowledge-sharing event.
Sharon tabled a motion of gratitude by the Ambassadors for all the hard work and effort that Claudette had put into the international program, especially the ambassador initiative that was now starting to bear fruit. Claudette received a standing ovation and welcomed Sonia Black who will be taking over as International Director in July 2003.

For and on behalf of
Claudette Samuels
International Director
ARMA International
10/2002
A Time for Reflection, a Time to Look to the Future

(Continued from page 2)

A key component of San Diego ARMA is its ability to communicate and get out the news. This is done with our newsletter, “Off the Record.” Cynthia Lacy, Newsletter chair, is person that makes this all happen. It is also put on the web at www.sandiegoarma.org.

One of Chapter’s key factors to success is its people. Our organization has a great volunteer staff that work together to give you the very best programs possible. The team also has fun doing it. So, if you are a member, want to become a member and/or like to serve your organization for a year or two please get involved. If you need to contact anyone of us please refer to the back page of this newsletter for email addresses and/or phone numbers. Welcome to San Diego ARMA’s next exciting six month’s worth of 2003 programs!

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

2002-2003 Meeting Programs
November 20, 2002
January 30, 2003
March 20, 2003 1/2
Day Seminar
June 19, 2003 Final Luncheon for the year

the an-Region Conference. This conference is great for new members as it enables a new member to be more productive on our Board. The conference is scheduled for the third week in June and will be hosted by the Utah Chapter this year.

Richard Berlin and Susan Comer, Program Co-Chairs, have put together a great line-up of speakers based on a themed program content, Strategic Information Management (SIM). In September John J. Isaza, Esq. delivered “A Trial Lawyer’s take on the Admissibility of Electronic Records” and Ms. Marti Fischer, CRM, gave “How Long Should I Keep My Records? Developing a Credible Retention Schedule.” For the next six months we have Sheryl Roush, a motivational speaker, “How to communicate with anyone, anywhere - on their level!” in January, John Phillips “Inventorying Electronic Information Systems for Records Management” in March, and Juanita Skillman, ARMA International President, is installing our new officers for the 2003-2004 year in June.

Trey Williams, Membership chair, has indicated that our organization has grown from 78 to 84 members this year. Our target is a 10% growth (86 members) so the organization is well on the way to meeting that goal. So if you want to become a member please contact him. Since Trey has the mailing list he is the one who mails out the newsletter and emails/mails the flyers to you.

Benay Berl, Education/Industry Specific Group (ISG) chair, awarded Riaa Juvenon a first Place award for her article on “Why Records Management is Important Today” and it was subsequently published in this newsletter in September. Benay will also be hosting this year’s contest. We look forward to up-coming records management articles from Benay’s records management class. Benay is also working to increase the knowledge of ISGs in your business area by setting up a table at each business lunch.

A key component of San Diego ARMA is its ability to
RECORDS AND INFORMATION MANAGEMENT
SPECIALIST CERTIFICATE
Classes start January 13 for the totally online Records and Information Management Specialist Certificate Program through Chippewa Valley Technical College in Eau Claire, WI. Registration is on now.

These courses are totally online from your home or office. This is an excellent opportunity to update your skills and become current in the field and also update your position--hopefully for a job raise.

This certificate is composed of five 3-credit courses each being 16 weeks. We have had over 500 students in 35 states and 15 countries take these courses in the last 3 years.

Our students are records and information management professionals, and archivists, from beginners to professionals with advanced degrees. We have worked with ARMA, the Association of Records Managers and Administrators, and feel the courses cover the needed competencies in the field.

There is no out-of-state or out-of-country tuition. Each course is approximately $210 with a textbook fee of approximately $70.00. The first course of the five is Records and Image Management, 176-105.

Costs and course descriptions are available on our website at http://www.cvtc.edu then go to Distance Learning, then Available Internet Courses, then Records and Information Management. You can also go to that same website, and go to Programs and Courses, then Records and Information Management for more information.

You can register by calling toll free at 1/800/518/8211 with a credit card. There is an online form to purchase the text. Go to the http://www.cvtc.edu, then Distance Learning, then Online Book Purchases.

For information, please call the instructor, Mary Welch, at 715/833-6376, or 1/800/547/2882 or email me at welchme@yahoo.com. This is an excellent way to further your education. Let me know where I can help.

ARMA EDUCATIONAL OPPORTUNITIES
*There are 6 new online courses scheduled to be online between now and the end of April.

SEMINARS:
*Fundamentals - Orlando - Feb. 6-7, 2003 by Mark Langemo
*Fundamentals - Kansas City - March 10-11 by Mark Langemo
*ISG Midyear, Reno, NV - April 28 and 29 ISGs education, Healthcare and 
*Pharmaceutical, Government, Energy and Consumer services

PUBLICATIONS:
*There are 5 new publications in the works to be released between now and May 2003.

*The new publications catalog will be out with the January/February Journal.

COMMUNICATIONS:
*ARMA Web site will have a new look in a few months.

MEMBER SERVICES:
*Dues $150 effective May 1, 2003
*MemberFest - approximately 90 new members to date - goal is 500 by June 30, 2003
*December - Postcard mailing sent to all members without email requesting their information
*Anita Willis will be on medical leave beginning January 8 for approximately 6 weeks. Melissa Ebert will be filling in for Anita Willis during this time.

PR AND ADVOCACY:
*New buyers guide - April 03
*New electronic Leg./Reg. briefing out in January
*RIMM month - April 03 - Bob Tillman coordinating
*PIP Day - April 03 - Bob Tillman coordinating

FYI
NEW ONLINE LEARNING CENTER IS LIVE!
ARMA International is proud to announce the new ARMA Learning Center, your gateway to self-paced learning opportunities. The Learning Center is your one-stop shop for courses and seminars in records and information management, computer skills, and special topics such as privacy and HIPAA. Check out the site today at www.armalearningcenter.org.

PRIVACY: TODAY'S HOT BUSINESS ISSUE
Is your organization concerned about privacy? Privacy is one of the most important emerging issues in today's new economy. You don't want to take a chance that your organization may be caught off-guard by a hidden problem or an inadvertent mistake; becoming familiar with the new privacy landscape is critical today. Privacy Basics, a four-course series, will keep you prepared by helping you understand how privacy applies to your organization and how to bring your organization up to the current standards of privacy protection for customers.

- Module 1: Privacy Basics: An Overview
- Module 2: Privacy Basics: Legislation & Enforcement
- Module 3: Privacy Basics: Privacy Acts in the United States

To learn more or to register, go to www.armalearningcenter.org.

RECORDS & INFORMATION MANAGEMENT: BUILDING THE FOUNDATION SEMINAR SERIES
How well does your organization manage its records? Are they an asset or a liability?

The answers could mean the difference between survival and failure!

"Records and Information Management: Building the Foundation" features Mark Langemo, one of the country's leading experts in records management. In this educational two-day seminar, Dr. Langemo will prepare you to develop an organization-wide records management program or enhance an existing one.

You'll learn how to

- manage a successful organization-wide records program
- recognize the legal issues involved with records retention
- improve or develop your filing system
- maximize new technology use

Who should attend:
Individuals with less than three years' experience in handling and managing records or anyone who wants to better manage their organization-wide records program.

This seminar is offered in Orlando, Florida, February 6-7, 2003, and in Kansas City, March 10-11, 2003. For more information and to register, go to www arma.org/learning/seminars/spring_records.cfm.

(Continued on page 14)
Can we ever know enough? Whether you are a records manager or a vendor servicing the profession, you can never have enough records management information to do your job efficiently and effectively.

Having the correct information is not always easy. The profession is growing rapidly and that is good. But it is also changing at lightning speed, and that makes it difficult to “keep up.” That being the case, what we learned yesterday may be “old” information today. With that in mind, the following information will be of help to you.

Mesa College, Computer & Business Technology, a class in records management is now available as an on-line distance education class. You can complete this 16 week course from your home or office. For more information contact Mesa College at www.sdccd.net and check out their on-line class schedule.

UCLA Extension has 3 day classes. They take place on the UCLA campus in Los Angeles. For additional information and a complete course description, please visit their web site, http://www.unex.ucla.edu/shortcourses

ARMA International has a new series of education classes. You can learn more about the offerings by going to their website at www.arma.org

Want to be in contact with 1600 of your peers, join the records management listserv. You can sign up at www.recmgmt-l@lists.uf.edu

Best of all, continue to attend the San Diego ARMA seminars/meetings.
Have you seen that e-mail I sent Robert last February?

Can I get the Hickenlooper home equity loan file? Over the web??

Remember the Fitzpatrick deposition we took a couple years back?

Can they really do that?

Yes.

IRON MOUNTAIN
The Leader in Records & Information Management

1-800-FastFile  ▲  www.ironmountain.com
January Registration Form

To Register: FAX this form to Trey Williams at (858) 679-7341, or Call Trey @ 858 748-1100 x209, or Email : twilliams@corovan.com NO LATER than 3:30 p.m., Friday, January 24, 2003. Cancellations later than 48 hours prior to the event will be billed to the person registered.

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Organization: ____________________________________________

Phone: ______________________  FAX : ______________________  EMAIL : ______________________

Marriott Courtyard—Kearney Mesa
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(858) 573-0700

Bring Gently used books for a chance to Win a PRIZE. We are collecting books for READ/San Diego. Books collected will either be resold and the money donated to the program or used for instruction.
ISO 15489 Audio Conference
Thanks to Arthur Andersen and the Sarbanes-Oxley Act, corporate records and information management (RIM) programs are being held increasingly accountable. Now is an opportune time to impress your senior management with the important role your RIM program is playing and can play in meeting new regulations, increasing competitiveness, and reducing risks.

One way to illustrate your program’s excellence is through compliance with ISO 15489, the international standard on records management. This recently published standard can help your organization meet its goals through best practice in managing its information assets. Find out how in this new audio conference from ARMA International, one of the organizations involved in drafting the international standard.

"ISO 15489: A Business Imperative," will be presented January 30, 11.00 a.m.-12:30 p.m. (Central Time), and will

- review the main elements of ISO 15489
- discuss the business benefits of applying the standard
- explain the steps you can take today to implement the standard

Diane Carlisle, CRM, ARMA’s director of professional resources and representative to the ISO committee that drafted this groundbreaking standard, will lead this audio conference.

For more information and to register, go to www.arma.org/learning/seminars/audio_conference.cfm.

Call for Programs
ISG Mid Year Call for Programs
Submit a proposal now for the ISG Mid Year program, to be held April 28-29, 2003, in Reno, Nevada. Being a speaker at the ISG Mid Year offers professional collaboration, a chance to share your experience and expertise with your colleagues, and a complimentary registration to the program. Submissions for the ISG Mid Year program are due January 27, 2003. For more information and to submit a proposal, go to www.arma.org/learning/cfp_spring.cfm.

48th Annual ARMA International Conference & Expo Call For Programs
Submit a proposal for the 48th Annual ARMA International Conference & Expo, scheduled for October 19-22, 2003, in Boston. Proposals are now being accepted for quality educational programming that is progressive, solutions-oriented, and grounded in sound RIM and business practices. This is an excellent opportunity to share with your colleagues the challenges you and your organization have faced and the solutions created in response to those challenges, as well as other valuable lessons learned. Innovative session topics and formats are encouraged. Guidelines and recommendations for session topics may be found at www.arma.org/learning/call_for_programs.cfm.

The time is now to contribute to your profession and participate in the industry’s premier educational event. By submitting your proposal, you are building knowledge and creating solutions!

For more information or to submit a proposal, go to www.arma.org/learning/call_for_programs.cfm their specific requirements.

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!
RSI is a national leader in environmental services

The absolute assurance that your material has been destroyed, and in a timely manner
The absolute assurance that you will not find your information in your competitors office
The absolute assurance that even though the material has been shred, it will be recycled
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Waste analysis and program design providing waste reduction and compliance with California Law (Assembly Bills 939, 75 and 2246).

RSI Consulting Services
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<td>President</td>
<td>David Taylor</td>
<td>San Diego Data Processing Corp</td>
<td>858 503-7284</td>
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