Steve has spoken at numerous Pacific Region chapters and leadership conferences over the last fourteen years. He led interactive sessions on diversity and culture at three ARMA Annual Conferences.
President's Message

This is the last issue of "Off the Record" until the fall. In the hiatus, keep up-to-date by visiting the ARMA International website: http://www arma.org. 

- Some of the places to look at are Education, Buyers Guide, Publications, Resources, Legislation and Policy Standards to name a few. 
- A few titles of information for you are: Rim and Privacy; ARMA International audio and web program archives; HIPPA Privacy Essentials; Sarbanes-Oxley Act. 
- The ARMA Bookstore is online shopping which is easy and ARMA members receive a discount. The Bookstore is the best place for books, briefings, videos and other resources related to information management.

You can also go to http://www arma.org/publication/infopro/online........where you can find out the recent "happenings" in the information profession as well as information you can use to assist your job and career.

At our local San Diego Chapter we have been pleased and proud to present various speakers from Records Basics presented by Bob Zornado to the Legal aspects of Records presented by John Montana. Our final speaker will be Steve Gray, our current Pacific Regional Director, and soon part of the International Board of Directors. Steve will be focusing on Ethics and business practices in regards to Records and Information Management. This promises to be a very special day for our San Diego members and guests.

This past year, the San Diego Chapter of ARMA has been excited to do some new (never done by this chapter) activities: 1) the ARMA-Night at the Mira-Mesa Soup Plantation – a fun-time....good food and part of the proceeds went to our organization for awards and conferences, 2) in December, we had a community-service night at KPBS as eight of the Board members gave an evening to assist the local Public Broadcasting station stumping for new-members and 3) last month – the San Diego Chapter had its first-ever......"tour". This was held at the San Diego Natural History Museum and those who attended were able to have a "behind-the-scenes" look at the way they handle their vast amount to files, specimens, etc. That quick-glimpse certainly showed us the importance and complication of keeping accurate records for such diverse items.

So......for now.....remember ARMA San Diego as the place to go for questions and assistance – we are here to help. Check out our web-site: http://www sandiegoparma.org, call any of the Board members or email your questions to the webmaster Cynthia Lacy and she will forward your inquiry to the proper person.

The San Diego Chapter will be having the next luncheon in September and ARMA International will be having their 49th Annual International Conference in Long Beach. The date for that is October 3 – 6—MARK YOUR CALENDARS!! It’s close so we hope that many of you will be able to attend.

DO have a great summer....do activities that are fun – be safe and we will be looking for YOU at the September ARMA luncheon....the date and subject will be on our website, in a flyer sent to the members and of course, in our newsletter.

For the coming year – be prepared to see new speakers, great ideas and many opportunities to learn!
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, UNIX, Cisco, Oracle, Air Training, TCP/IP, and many others. courses are offered at several campuses throughout the City.

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.cfm

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

Records Manager Technical Bulletins

I found these technical bulletins on the web. They are a very good source of general information especially for persons new to Records Management. I chose to put three in this newsletter which hopefully will give the reader’s good information for: 1) Starting a Records Management Program, 2) Establishing Records Retention and 3) Developing a Records Storage System.

Starting A Records Management Program

Introduction
Records management is good business. Public officials are legally responsible for creating and maintaining records that document the transactions of government as it conducts business. These records provide evidence of the operations of government and accountability to its citizens. Public officials must maintain this information according to established retention requirements—regardless of the format in which they are kept (i.e., paper, microform, electronic records, magnetic tape, or digital optical disk).

To have an effective and legal records management program, implement records retention and disposition schedules, document destruction of scheduled records, and disseminate policies and guidelines to make municipal officials aware of their responsibilities.

Importance of Program
• To aid and assist the continuing operations of government officials in making informed policy and program judgments.
• To maintain good business practices—records management creates efficiency.
• To enable citizens to judge the conduct of the government by providing administrative, fiscal and legal accountability and documenting rights and responsibilities.
• To allow information to be open for observation and access, while safeguarding privacy and confidentiality.
• To assure the fullest possible historical documentation of your municipality’s actions.

What Is A Public Record?
Most states and local governments define a public record based on a standard professional definition: “Information that documents a transaction or activity by or with any public officer, agency or employee of state government or its production, collected, received or retained in pursuance of law or in connection with the transactions of public business.” Formats can include paper, microform, electronic records, magnetic tapes, maps, disks, photographs, film and sound recordings.

Remember that a “public record” means only that it is a government record. As such, public records must be available for appropriate access, though not necessarily open to everyone. Your state’s Freedom of Information Act, Open Records Law or Sunshine Law addresses access to public records.

Records Management Objectives
To provide the right information...at the right place...at the right time...to the right person...efficiently...at the lowest possible cost.

Records management is the economical and efficient administrative process for managing information throughout its life cycle—from creation to its final designated disposition (destruction or preservation). It also is a process of maintaining information in a format that allows for its timely access. An effective records management program consists of:
• Developing policies and procedures for managing records and information.
• Implementing filing and indexing systems and tools.
• Conducting an inventory of records.
• Establishing and following records retention schedules.
• Identifying and using technology appropriately to create, store and retrieve materials.
• Storing inactive records in a cost-effective and secure location.
• Destroying obsolete records in a timely and systematic manner and documenting their destruction.
• Identifying and preserving vital records (those that are essential to conducting and continuing business operations).
• Identifying and preserving archival (historic, permanent) records.
• Developing a disaster preparedness plan to protect and recover records in the event of a disaster.
• Developing forms to maintain efficient operations.

(Continued on page 4)
Benefits of a Program
- Locate what you need when you need it.
- Reduce the volume of records stored.
- Improve storage and retrieval systems.
- Increase efficiency of office operations.
- Reduce costs for equipment, supplies, space and personnel.
- Identify and protect vital records.
- Improve customer relations.
- Improve accountability of public funds.
- Reduce liability risks by keeping records according to an authorized retention schedule.

Establishing an RM Program
Identify the person or persons who will serve as the records officer(s) (and office coordinators, if needed) and lead the records management program.

Contact the agency responsible for oversight of your state’s public records management and/or archives programs (e.g., state library, state archives, historical society). Refer to Appendix for listing of agencies.

Conduct an inventory to identify the types of records you have (an inventory or survey form may be available from your state’s public records management oversight agency).

Draft a records retention and disposition schedule and seek appropriate approval for it if no schedule exists. Refer to IIMC Records Management Technical Bulletin 3.

Develop records management policies and procedures to be disseminated to local public officials, along with approved retention schedules. A plan for protecting and preserving your vital and other records in the event of a disaster also should be developed and distributed.

Review the records management program annually, including a critique of your disaster plan.

Records Management Terms

Active Records. Documents and materials frequently or regularly used to conduct government activities. They should be located close to where they are accessed.

Inactive Records. Documents and materials that are not accessed more than twice a year and whose retention requirements have not yet been met.

Records Series. A group or unit of related documents or information that is normally filed or kept together because they relate to a particular subject or function, result from the same activity, or document a particular transaction or activity. For example, correspondence, contracts, ordinances, fiscal vouchers, project files, resolutions and time sheets.

Records Inventory. Also called a records survey: Data compiled on a form that describes the types of records groups or records series within a department. It includes information on the function of the records; their format, use, and volume; and location. An inventory is not a list of individual documents or folders.

Records Retention Schedule. Guidelines that list records series and state what to do with the records—how long to retain them, special maintenance instructions, and procedures for disposing of them. Retention schedules reflect the length of time that records have operational, legal, fiscal, or historical value. Schedules are based on legal and administrative requirements, including laws enacted by local, state or federal legislative bodies, rules and regulations imposed by government and regulatory agencies, the statute of limitations for legal recourse, and judicial or administrative opinions.

Vital Records. Information and materials that are essential for the continuous operation of an organization. Identifying these records ensures that in the event of a disaster, the information can be accessed and business operations can resume or continue. Vital records do not necessarily have a permanent retention or historical value.

Getting Help
State Records Management / State Archives Program Most municipalities can receive expert guidance by contacting their state’s agency that is statutorily charged with oversight of the public records management program and / or the state archives. Refer to the Appendix for a list of agencies. In the absence of such guidance, take the lead in establishing a records management program and records retention schedules. Professional organizations that can provide assistance include:

International Institute of Municipal Clerks (IIMC) (909) 392-4462; www.iimc.org/
National Association of Government Archivists and Records Administrators (NAGARA) (513) 225-4284; www.nagara.org/
Association of Records Managers and Administrators (ARMA) (800) 422-2762, www.arma.org/ (See also, "Developing (Continued on page 3)"
Establishing Records Retention

Introduction
The survey and inventory data collected on the records and information maintained by your organization is used to compile a records retention schedule—refer to IIMC Records Management Technical Bulletin No. 3. By appraising this data, you will be able to establish reasonable retention periods, maintenance specifications and disposition procedures. By following a retention schedule, systematic control of information from its creation to final disposition is established. Retention schedules are the most important part of a records management plan.

What is a Retention Schedule?
A records retention schedule (also known as a records control schedule) lists records series and provides instructions and special guidelines for their care—how long to retain them, how to maintain them, and procedures for disposing of them. Retention schedules reflect the length of time that records have operational, legal, fiscal, or historical value.

• Note: Many states issue “general” retention schedules that its municipalities can use. Contact your state’s records management/archives agency to see if a general retention schedule for your records exists.

• Your state may have special requirements for establishing a retention schedule, such as submitting it for approval by the agency or a board.

Benefits of a Schedule
• Ensures that records needed for legal, fiscal, or administrative use will not be destroyed prematurely.
• Determines when records may be transferred to inactive storage or to another repository for permanent storage.
• Assists with making reformatting decisions (i.e., converting records to a microform or scanning them for use on a computer).
• Allows records that are no longer useful to be destroyed legally.
• Helps reduce the space and equipment necessary for filing records, thus saving money.
• Provides information to develop a vital records protection plan.
• Releases electronic storage space on computer disks, video and audio tapes.
• Ensures the preservation of records with historical value.

Building the Retention Schedule
Refer to your inventory or survey forms to examine the data gathered on each records series. Each valid records series will become an item on your proposed retention schedule.

• A records series is a group or unit of related documents or information that is normally filed or kept together because they relate to a particular subject or function, result from the same activity, or document a particular transaction or activity. Examples include correspondence, time sheets, contracts, ordinances, fiscal vouchers, project files and resolutions.

Evaluating Retention Periods
The retention period for records is based on the value of the information and laws that govern the records. Most
records have a short life span (about five years) but others have longer retention periods for various reasons. Certain types of records are kept permanently because of historical value.

- At what point does the information cease to be useful? When can it be destroyed without hindering the functions of an office or municipality, or denying the rights of citizens?
- The federal, state and/or municipality may have laws or regulations that specify a recordkeeping requirement. Your legal counsel can provide guidance on these. A retention period may not be less than what has been set for them by a state or federal law, regulation or court ruling.
- Other municipalities may have established retention schedules that will assist you. However, you do not simply adopt those schedules—their records, procedures and regulations may be different from yours.
- Consult those who use the records about their specific administrative needs. Determine when the information is no longer needed.

- What is the administrative value? These records are necessary for the day-to-day business operations of your office. Do they establish policy or document operations? Administrative value is usually short-lived. Examples: correspondence, memos and reports.

- What is the financial value? These records document your office’s fiscal responsibilities, such as the receipt, payment, transfer, adjustment or encumbrance of public funds. They usually lose their value once an audit has been approved. However, records that establish or change fiscal policies will have a longer retention. Examples: canceled checks, deposit slips, invoices, receipts and purchase orders.

- What is the legal value? These records have a mandated retention by statute or regulation, may be needed as evidence in litigation, or document the rights of citizens or obligations of government. Determine the legal value of records with assistance from legal counsel. Examples: leases, deeds, titles, contracts, franchises and court case files.

- Do they have historical value? These records, which usually have a permanent retention, document the history of the government and community, and constitute only a small percentage of the total volume of records in an organization. These historic, or archival, records contain significant information about persons, places, events, government or corporate organizations, etc. Sometimes records are valuable because of their age or rarity, such as records of the 18th and 19th centuries. Examples: minutes, resolutions, ordinances, plat maps, policies and annual reports. Other considerations:
  - Value of the records as a source of information about the subject or action they document.
  - Duplication of the records in other offices of government.
  - Reliability and completeness of the records.
  - Accessibility and usability of records.
  - Maintenance and retention of records and costs associated with storage.

Composition of Schedule
Generally, schedules include the following information:
- Schedule number.
- Date effective.
- Name of organization.
- Name of department.
- Records series title (include commonly used title, if appropriate).
- Description of the of the records series.
- Retention period for records, including on-site (for active records) and off-site (inactive records) periods.
- Method of records disposal or preservation.
- Special instructions.

Making the Schedule Legal
After the schedules have been drafted, seek department heads, legal counsel and the municipality’s managing official or body for internal approval for them. Submit the draft to the municipality’s managing official or body for comments. Negotiate changes as necessary. Once your municipality formally approves the schedule, submit it to the state records management/archives agency for review and approval, if mandated.

(Continued on page 7)
**Interview with Joe Conroy**

By Trace Hughes

This is an interview with Joe Conroy, Records Supervisor for Latham & Watkins LLP.

**What is your title?** Records Supervisor

**How long have you been a records manager at Latham & Watkins, LLP?** Two Month's

Have you been a records manager anywhere other than Latham & Watkins, LLP and for how long? No

**How did you progress into your records manager position?** Started with the firm ten years ago as a file clerk, to records technician, to records specialist, to case room coordinator and presently records supervisor

**What is your biggest success in your RIM program?** Moving our office from the Merril Lynch Building, 701 B St, to One America Plaza, 600 W Broadway over the 04 Valentines weekend.

**What do you see in the future for the records profession?** A vast improvement in electronic processing & searching capabilities.

Please describe how ARMA helped you in your career? I haven’t had the privilege of experiencing this yet!

**What database software does your firm use?** ELITE

Do you think that law offices will ever be “paperless”? NO

If you were given “carte blanche” on your budget this year, what would you do? Build a coffee cart concession in the Records Center.

**What kind of file folder is your favorite?** Electronic

If you could have the perfect job, what would it be? The Dalí Lama's

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**Dialing for Document Destruction Tips**

It is too little too late for two US companies that now are best known for improperly destroying documents. But with the help of a free information hotline, perhaps others can make wiser document-destruction decisions. The “Shred-U-Cation” hotline, which can be accessed at 508.587.3773, was established for businesses and individuals by Datasafe Information Security, an information security solutions provider. The service provides tips for selecting a reputable document destruction vendor, and advice on what questions to ask and protection to expect from vendors. The line also divulges the type of insurance that protects consumers, the type of bonding that offers the best shield, the ways to verify a vendor’s reliability, the size of shred that is most secure, and company standards for medical and financial industries. The following tips are a sample of those found on the hotline:

- Examine your needs before selecting a document destruction vendor and find one that meets those needs
- “Get it in writing”: Vendor guarantees are only promises until they are put in writing
- Know who is handling your secure documents; Find out whether the vendor uses temporary employees, contract workers or subcontractors
- “Certificates of Destruction” provided by vendors will not hold up in court and do not transfer liability
- Errors and Omissions insurance is key. Regular bonding only protects the vendor, and “third party fidelity” bonding safeguards companies against theft of physical assets only
- Get the cost structure in writing: charging by the minute and by the pound are not in a client’s best interests
- Documents should be shredded in pieces no larger than a thumbnail or in strips no more than a half-inch wide

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**Records Management Technical Bulletins**

(Continued from page 6)

The schedules become your office's legal documentation for the retention and disposition of its records. Distribute copies to all departments, along with records management procedures.

**Document Records Destruction**

Most states have public records laws requiring that the destruction of public records be documented. Usually a form is used to enter information regarding the records to be destroyed, and various authorized persons approve the destruction. Refer to Appendix for a sample records destruction form.

**Implementation of Schedules**

Review the inventory / survey and identify the records eligible for destruction under the schedule. List the records on a records destruction authorization form and obtain signatures to approve their disposal. Use a method of destruction appropriate to the records. Establish a regular review and disposal of records, usually at the end of the calendar or fiscal year. Review retention schedules periodically and revise as needed.

This Records Management Technical Bulletin is one of a series, and was compiled by Jelan Chubb, Missouri State Archives and Amelia Winstead, Georgia Department of Archives and History. The Bulletin was edited by IIMC members and staff, and Grace Lesner and Pete Schinkel of the National Association of Government Archives and Records Administrators.

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**Developing A Records Storage System**

**Introduction**

Once your records retention schedules are approved and implemented, it’s time to develop a systematic records storage system. A properly designed storage system will house inactive records in a central, low-cost area. This frees valuable office space, saves time in accessing records, and encourages efficient operations.

Most states endorse only two formats for maintaining long-term or permanent records: microfilming and original paper. Few small municipalities have the funds to invest in microfilm programs or have access to sustained grant awards to film historic and/or permanent records.

While this Technical Bulletin focuses on developing a records storage program for paper records, procedures presented may be used in conjunction with microfilming.

**Purpose**

A well-designed records storage system will:

- Remove inactive records from expensive office storage areas and provide economical storage for them.
- Assure fast and easy retrieval of stored records.
- Provide for the timely disposition of records according to approved retention schedules.
- Protect the records maintained.
- Provide for the timely disposition of records according to approved retention schedules.

**Selecting a Storage Site**

Consider the following when looking for an appropriate storage site:

- Buildings owned by your municipality.
- A storage area central to its users is best. If necessary, several storage areas may be designated.
- Vacant offices may provide suitable storage, especially if the heating and cooling system maintains temperatures in the 65-70 degree range.
- Smoke detectors in the area are important.
- Water sprinklers or other fire extinguisher systems safeguard the records. Water damaged records usually can be restored; burned records are lost forever.
- Smoking, eating and drinking should be forbidden in storage areas.
- Avoid areas exposed to smoke, dust or chemical fumes produced by paints or copying devices.
- Attics, basements, garages and warehouses are not the best choices for storage because of temperature variations.
- Avoid areas with water pipes in the ceiling.
- Permanent, historic and vital records have special storage considerations. Consult with your state’s records management/archives agency for storage options. Ideally, they are stored in a secure vault. Identify which...
Selecting Records for Storage
Office space is expensive and limited. Only the most current and frequently used records should be housed in an office area. Records that are accessed less often are sent to storage, where they can be retrieved quickly when needed. Ideally, records retention schedules designate when a records series is to be sent to storage. For records series without out storage guidelines, consider:

- Active and inactive records means the reference rate of a records series. As records get older, they are needed less often.
- Records series that are referred to more than once a month per file drawer are considered active, and are kept in the office.
- Records series that are referred to less than one search per file drawer per month can be sent to storage.
- To check the reference rate of a group of records, keep a small piece of paper on each file drawer for a few months. Place a tally mark on the sheet each time a file is pulled from that drawer.
- If you sent a group of records to storage and find you are retrieving them frequently, you may wish to move them back into the office.

Records which are considered of historic value should be placed in a special, secure and environmentally stable area.

Storage Boxes and Shelving

- Be uniform in size. The standard is one cubic foot (15"W x 12"D x 10"H) with a separate lid.
- Have double or triple walls/bottoms so they can be safely stacked and reused.
- Be made of acid-free cardboard for storing permanent and long-term records (e.g., council minutes, resolutions, etc.). Standard storage boxes, which are less expensive, can be used for normal, non-permanent records storage.
- Shelving units should:
  - Be sized to ensure the weight of the loaded shelves meets the floor load capacity (the most common shelf size is 42"x30" or 32").
  - Be sturdy enough to hold boxes loaded with as much as 50 pounds of paper.
  - Have bottom shelves to keep boxes at least three inches off the floor.
  - Provide sufficient space for the boxes to be pulled off the shelves easily.
  - Be marked with their number and storage location. Black markers can be used to write on labels, or printed labels can be used. Many boxes have a pre-printed area on one end.

Managing the Storage Area

To keep track of items in the records storage area, a computer software database or program or paper index cards can be used to identify the contents, characteristics and location of each box. Codes can be developed for categories, but they must be standard and used by all departments to prevent confusion.

- Boxes should be marked with their number and storage location. Back markers can be used to write on labels, or printed labels can be used. Many boxes have a pre-printed area on one end.
- Note: Do not mix records with different destruction dates in the same box. The objective is to discard the entire box of records when its retention period is met, rather than weeding through and separating folders in a box.

- By entering box control information into a software word processing program (such as Access:)
  - Box number: each box is given a next consecutive number as placed in the first part consisting of:
    - Box was placed in storage. Note: Do box and its contents are destroyed.
    - Location of box: building (if needed), location.
    - Destruction date, as set by records can be sorted by date to keep track

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  • Have bottom shelves to keep boxes at least three inches off the floor.
  • Provide sufficient space for the boxes to be pulled off the shelves easily.
  • Be placed two back to back to comprise a row; this allows for the most efficient and practical arrangement of boxes.
  • Be anchored to the floor, where possible. Tying the shelving to each other at the top makes them safer, too.
• Be accessible by a sturdy and appropriately sized ladder.

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To keep track of items in the records storage area, a computer software database or program or paper index cards can be used to identify the contents, characteristics and location of each box. Codes can be developed for categories, but they must be standard and used by all departments to prevent confusion.

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• Destruction date, as set by records can be sorted by date to keep track of destruction times.

Records Management Technical Bulletins
(Continued from page 8)

• Records series title (as stated in the records retention schedules).
• Date range of records in box.
• Department responsible for the stored records.

Packing and Stacking Boxes
Letter-size files fit across the 12” side; legal-size files fit across the 15” side; computer printouts (without binders) can be placed flat in the box.
• Keep records in their original file folders when placing in boxes.
• Fill boxes completely, but do not pack tightly; this will impede file removal.
• Larger records and materials, such as maps and drawings, may need special handling and a separate storage system and area.
• To store boxes on the floor, stack them on pallets five high and in rows.

Disposal of Records
Destroying records in a timely manner and according to an approved records retention schedule protects your municipality’s interests. By following the schedules in a methodical manner, the costly and time-consuming production of copies for litigation or investigations can be avoided. Thus, documented destruction of records protects your organization.

The disposal of records is dictated by a retention schedule. Records destruction should be documented on a standard form, with appropriate individuals approving their disposal. (Refer to Appendix for sample.) Contact your state’s records management / archives agency for procedures on documenting records disposals, and ask:

• If pre-approval prior to destruction is required.
• How confidential or sensitive records can be destroyed.
• If non-confidential records can be sent to a landfill.
• If the state allows destruction of original records after they have been microfilmed, verified and the master properly stored.

Regardless of the method decided upon, use the records retention schedule to determine which boxes can be destroyed at the same time, then pull all those boxes. Sort the boxes by method of destruction needed. (Boxes can be coded by destruction method as they are placed into storage.)
• If there are no specific or conflicting state requirements, consider the following:
  • Confidential or sensitive records can be shredded, dissolved in acid vats or burned to protect confidentiality.
  • Shredding generally is the most time-consuming and expensive method to destroy records.
  • Shredded records can be placed in large plastic bags and recycled.

• Some large institutions or industries have boilers that can burn items such as boxes and records. One of your employees should witness the burning to ensure that confidentiality is not breached.
• See if the local landfill will allow you to burn at their facility.
• Non-confidential or non-sensitive records can be disposed of by recycling, or discarded through regular trash removal.

Keeping the System Effective
Enact the records management program in ordinance or resolution to endorse the authority of the program. This will help maintain the integrity of the records storage system.

Training sessions will help everyone understand procedures. Disseminate written procedures describing how to use the records storage program and to ensure that it operates in a standard manner.

Use check-out controls for records removed from the storage area to ensure accurate tracking and proper refileing. Periodically review your storage program as records needs change.

This Records Management Technical Bulletin is one of a series, and was compiled by Carrie Townlee-Porter, Reno, NV. The Bulletin was edited by INMC members and staff, and Grace Lessner and Pete Srenkel of the National Association of Government Archives and Records Administrators.

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**Interview with Joe Conroy**

**By Tracee Hughes**

**Dialing for Document Destruction Tips**

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The "Shred-U-Call®" hotline, which can be accessed at 508.587.3773, was established for businesses and individuals by Datasafe Information Security, an information security solutions provider.

The service provides tips for selecting a reputable document destruction vendor, and advice on what questions to ask and protection to expect from vendors. The line also divulges the type of insurance that protects consumers, the type of bonding that offers the best shield, the ways to verify a vendor’s reliability, the size of shred that is most secure, and company standards for medical and financial industries.

The following tips are a sample of those found on the hotline:

- **Examine your needs before selecting a document destruction vendor and find one that meets those needs**
- **“Get it in writing”: Vendor guarantees are only promises until they are put in writing**
- **Know who is handling your secure documents; Find out whether the vendor uses temporary employees, contract workers or subcontractors**
- **“Certificates of Destruction” provided by vendors will not hold up in court and do not transfer liability**
- **Errors and Omissions insurance is key. Regular bonding only protects the vendor, and “third party fidelity” bonding safeguards companies against theft of physical assets only**
- **Get the cost structure in writing: charging by the minute and by the pound are not in a client’s best interests**
- **Documents should be shredded in pieces no larger than a thumbnail or in strips no more than a half-inch wide**

**What is your biggest success in your RIM program?**

Moving our office from the Merrill Lynch Building, 701 B St, to One America Plaza, 600 W Broadway over the 04 Valentines weekend.

**What do you see in the future for the records profession?**

A vast improvement in electronic processing & searching capabilities.

**Please describe how ARMA helped you in your career?**

I haven’t had the privilege of experiencing this yet!

**What database software does your firm use?**

**ELITE**

**Do you think that law offices will ever be “paperless”? NO**

**If you were given “carte blanche” on your budget this year, what would you do?**

Build a coffee cart concession in the Records Center.

**What kind of file folder is your favorite?**

**Electronic**

**If you could have the perfect job, what would it be?**
The Dalí Lama’s

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**Records Management Technical Bulletins**

(Continued from page 6)

The records management technical bulletin is one of a series, and was compiled by Jelan Chubb, Missouri State Archives and Amelia Winstead, Georgia Department of Archives and History. The Bulletin was edited by ARMA members and staff; and Grace Lesener and Pete Schinkel of the National Association of Government Archives and Records Administrators.

- **Developing A Records Storage System**
- **Introduction**
  - Once your records retention schedules are approved and implemented, it’s time to develop a systematic records storage system. A properly designed storage system will house inactive records in a central, low-cost area. This frees valuable office space, saves time in accessing records, and encourages efficient operations.
  - Most states endorse only two formats for maintaining long-term or permanent records—microfilming and original paper. Few small municipalities have the funds to invest in microfilming programs or have access to sustained grant awards to film historic and/or permanent records.
  - While this Technical Bulletin focuses on developing a records storage program for paper records, procedures presented may be used in conjunction with microfilming.
- **Purpose**
  - A well-designed records storage system will:
    - Remove inactive records from expensive office storage areas and provide economical storage for them.
    - Assure fast and easy retrieval of stored records.
    - Protect the records maintained.
    - Provide for the timely disposition of records according to approved retention schedules.
- **Selecting a Storage Site**
  - Consider the following when looking for an appropriate storage site:
    - Buildings owned by your municipality.
    - A storage area central to its users is best. If necessary, several storage areas may be designated.
    - Vacant offices may provide suitable storage, especially if the heating and cooling system maintains temperatures in the 65-70 degree range.
    - Smoke detectors in the area are important.
    - Water sprinklers or other fire extinguisher systems safeguard the records. Water damaged records usually can be restored; burned records are lost forever.
    - Smoking, eating and drinking should be forbidden in storage areas.
    - Avoid areas exposed to smoke, dust or chemical fumes produced by paints or copying devices.
    - Attics, basements, garages and warehouses are not the best choices for storage because of temperature variations.
    - Avoid areas with water pipes in the ceiling.
  - Permanent, historic and vital records have special storage considerations. Consult with your state’s records management/archives agency for storage options. Ideally, they are stored in a secure vault.
records have a short life span (about five years) but others have longer retention periods for various reasons. Certain types of records are kept permanently because of historical value.

- At what point does the information cease to be useful? When can it be destroyed without hindering the functions of an office or municipality, or denying the rights of citizens?
- The federal, state and/or municipality may have laws or regulations that specify a recordkeeping requirement. Your legal counsel can provide guidance on these. A retention period may not be less than what has been set for them by a state or federal law, regulation or court ruling.
- Other municipalities may have established retention schedules that will assist you. However, they do not simply apply those schedules—their records, procedures and regulations may be different from yours.
- Consult those who use the records about their specific administrative needs. Determine when the information is no longer needed.
- What is the administrative value? These records are necessary for the day-to-day business operations of your office. Do they establish policy or document operations? Administrative value is usually short-lived. Examples: correspondence, memos and reports.
- What is the financial value? These records document your office’s fiscal responsibilities, such as the receipt, payment, transfer, adjustment or encumbrance of public funds. They usually lose their value once an audit has been approved. However, records that establish or change fiscal policies will have a longer retention. Examples: canceled checks, deposit slips, invoices and purchase orders.
- What is the legal value? These records have a mandated retention by statute or regulation, may be needed as evidence in litigation, or document the rights of citizens or obligations of government. Determine the legal value of records with assistance from legal counsel. Examples: leases, deeds, titles, contracts, franchises and court case files.
- Does it have historical value? These records, which usually have a permanent retention, document the history of the government and community, and constitute only a small percentage of the total volume of records in an organization. These historic, or archival, records contain significant information about persons, places, events, government or corporate organizations, etc. Sometimes records are valuable because of their age or rarity, such as records of the 18th and 19th centuries. Examples: minutes, resolutions, ordinances, plat maps, policies and annual reports.

Other considerations:
- Value of the records as a source of information about the subject or action they document.
- Duplication of the records in other offices of government.
- Reliability and completeness of the records.
- Accessibility and usability of records.
- Maintenance and retention of records and costs associated with storage.

Composition of Schedule
Generally, schedules include the following information:
- Schedule number.
- Date effective.
- Name of organization.
- Name of department.
- Records series title (include commonly used title, if appropriate).
- Description of the of the records series.
- Retention period for records, including on-site (for active records) and off-site (inactive records) periods.
- Method of records disposal or preservation.
- Special instructions.

Making the Schedule Legal
After the schedules have been drafted, seek department heads, legal counsel and the municipality’s managing official or body for comments. Negotiate changes as necessary. Your municipality formally approves the schedule, submit it to the state records management / archives agency for review and approval, if mandated.

(Continued on page 7)
Establishing Records Retention

Introduction
The survey and inventory data collected on the records and information maintained by your organization is used to compile a records retention schedule—refer to IIMC Records Management Technical Bulletin No. 3. By appraising this data, you will be able to establish reasonable retention periods, maintenance specifications and disposition procedures. By following a retention schedule, systematic control of information from its creation to final disposition is established. Retention schedules are the most important part of a records management plan.

What is a Retention Schedule?
A records retention schedule (also known as a records control schedule) lists records series and provides instructions and special guidelines for their care—how long to retain them, how to maintain them, and procedures for disposing of them. Retention schedules reflect the length of time that records have operational, legal, fiscal, or historical value.

• Note: Many states issue “general” retention schedules that its municipalities can use. Contact your state’s records management/archives agency to see if a general retention schedule for your records exists.
• Your state may have special requirements for establishing a retention schedule, such as submitting it for approval by the agency or a board.

Benefits of a Schedule
• Ensures that records needed for legal, fiscal, or administrative use will not be destroyed prematurely.
• Determines when records may be transferred to inactive storage or to another repository for permanent storage.
• Assists with making reformatting decisions (i.e., converting records to a microform or scanning them for use on a computer).
• Allows records that are no longer useful to be destroyed legally.
• Helps reduce the space and equipment necessary for filing records, thus saving money.
• Provides information to develop a vital records protection plan.
• Releases electronic storage space on computer disks, video and audio tapes.
• Ensures the preservation of records with historical value.

Building the Retention Schedule
Refer to your inventory or survey forms to examine the data gathered on each records series. Each valid records series will become an item on your proposed retention schedule.

• A records series is a group or unit of related documents or information that is normally filed or kept together because they relate to a particular subject or function, result from the same activity, or document a particular transaction or activity. Examples include correspondence, time sheets, contracts, ordinances, fiscal vouchers, project files and resolutions.

Evaluating Retention Periods
The retention period for records is based on the value of the information and laws that govern the records. Most
Benefits of a Program
- Locate what you need when you need it.
- Reduce the volume of records stored.
- Improve storage and retrieval systems.
- Increase efficiency of office operations.
- Reduce costs for equipment, supplies, space and personnel.
- Identify and protect vital records.
- Improve customer relations.
- Improve accountability of public funds.
- Reduce liability risks by keeping records according to an authorized retention schedule.

Establishing an RM Program
Identify the person or persons who will serve as the records officer(s) (and office coordinators, if needed) and lead the records management program.

Contact the agency responsible for oversight of your state's public records management and/or archives programs (e.g., state library, state archives, historical society). Refer to Appendix for listing of agencies.

Conduct an inventory to identify the types of records you have (an inventory or survey form may be available from your state’s public records management oversight agency).

Draft a records retention and disposition schedule and seek appropriate approval for it if no schedule exists. Refer to IIMC Records Management Technical Bulletin 3.

Develop records management policies and procedures to be disseminated to local public officials, along with approved retention schedules. A plan for protecting and preserving your vital and other records in the event of a disaster also should be developed and distributed.

Review the records management program annually, including a critique of your disaster plan.

Records Management Terms
Active Records. Documents and materials frequently or regularly used to conduct government activities. They should be located close to where they are accessed.

Inactive Records. Documents and materials that are not accessed more than twice a year and whose retention requirements have not yet been met.

Records Series. A group or unit of related documents or information that is normally filed or kept together because they relate to a particular subject or function, result from the same activity, or document a particular transaction or activity. For example, correspondence, contracts, ordinances, fiscal vouchers, project files, resolutions and time sheets.

Records Inventory. Also called a records survey: Data compiled on a form that describes the types of records groups or records series within a department. It includes information on the function of the records; their format, use, and volume; and location. An inventory is not a list of individual documents or folders.

Records Retention Schedule. Guidelines that list records series and state what to do with the records—how long to retain them, special maintenance instructions, and procedures for disposing of them. Retention schedules reflect the length of time that records have operational, legal, fiscal, or historical value. Schedules are based on legal and administrative requirements, including laws enacted by local, state or federal legislative bodies, rules and regulations imposed by government and regulatory agencies, the statute of limitations for legal recourse, and judicial or administrative opinions.

Vital Records. Information and materials that are essential for the continuous operation of an organization. Identifying these records ensures that in the event of a disaster, the information can be accessed and business operations can resume or continue. Vital records do not necessarily have a permanent retention or historical value.

Getting Help
State Records Management / State Archives Program Most municipalities can receive expert guidance by contacting their state’s agency that is statutorily charged with oversight of the public records management program and / or the state archives. Refer to the Appendix for a list of agencies. In the absence of such guidance, take the lead in establishing a records management program and records retention schedules. Professional organizations that can provide assistance include:

International Institute of Municipal Clerks (IIMC) (909) 392-4462; www.iimc.org/

National Association of Government Archivists and Records Administrators (NAGARA) (513) 225-4284; www.nagara.org/

Association of Records Managers and Administrators (ARMA) (800) 422-2762, www.arma.org/ (See also, "Developing...

(Continued on page 5)
Here's the URL to a very important site—the Chapter Connection on the ARMA International Website!

FYI

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, UNIX, Linux, Vista, MS Office, and many others. Courses are offered at several campuses throughout the city.

Please take a look at their web site, http://www.sandiegocct.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

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

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

CHECK IT OUT!!

Make your plans now!!

October 4-6, 2004 • Long Beach, CA

ARMA 2004 Creative Solutions for Changing Times

Happy Reading!!

RIM and Privacy: The New Business Imperative

HIPAA Privacy Essentials

Sarbanes-Oxley Act 2002 Materials

Tech Tuesdays: Learn About the Technical Side of Records Management. During March and April, Tech Tuesdays will feature several 90-minute Web seminars on topics touching the technical side of Records Management. Presentations topics include: electronic records management software implementation and instant messaging.

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 archiving processes and systems. Now available in the ARMA Learning Center.

San Diego ARMA Board Meetings

July 10

Records Manager Technical Bulletins

I found these technical bulletins on the web. They are a very good source of general information especially for persons new to Records Management. I chose to put three in this newsletter which hopefully will give the reader's good information for: 1) Starting a Records Management Program, 2) Establishing Records Retention and 3) Developing a Records Storage System.

Starting A Records Management Program

Introduction

Records management is good business. Public officials are legally responsible for creating and maintaining records that document the transactions of government as it conducts business. These records provide evidence of the operations of government and accountability to its citizens. Public officials must maintain this information according to established retention requirements—regardless of the format in which they are kept (i.e., paper, microform, electronic records, magnetic tape, or digital optical disk).

To have an effective and legal records management program, implement records retention and disposition schedules, document destruction of scheduled records, and disseminate policies and guidelines to make municipal officials aware of their responsibilities.

Importance of Program

• To aid and assist the continuing operations of government officials in making informed policy and program judgments.
• To maintain good business practices—records management creates efficiency.
• To enable citizens to judge the conduct of the government by providing administrative, fiscal and legal accountability and documenting rights and responsibilities.
• To allow information to be open for observation and access, while safeguarding privacy and confidentiality.
• To assure the fullest possible historical documentation of your municipality's actions.

What Is a Public Record?

Most states and local governments define a public record based on a standard professional definition: "Information that documents a transaction or activity by or with any public officer, agency or employee of state government or its political subdivisions. Regardless of physical form or characteristic, the recorded information is a public record if it is produced, collected, received or retained in pursuance of law or in connection with the transaction of public business." Formats can include paper, microform, electronic records, magnetic tapes, maps, disks, photographs, film and sound recordings.

Remember that a "public record" means only that it is a government record. As such, public records must be available for appropriate access, though not necessarily open to everyone. Your state's Freedom of Information Act, Open Records Law or Sunshine Law addresses access to public records.

Records Management Objectives

To provide the right information...at the right place...at the right time...to the right person...efficiently...at the lowest possible cost. Records management is the economical and efficient administrative process for managing information throughout its life cycle—from creation to its final designated disposition (destruction or preservation). It also is a process of maintaining information in a format that allows for its timely access. An effective records management program consists of:

• Developing policies and procedures for managing records and information.
• Implementing filing and indexing systems and tools.
• Conducting an inventory of records.
• Establishing and following records retention schedules.
• Identifying and using technology appropriately to create, store and retrieve materials.
• Storing inactive records in a cost-effective and secure location.
• Destroying obsolete records in a timely and systematic manner and documenting their destruction.
• Identifying and preserving vital records (those that are essential to conducting and continuing business operations).
• Identifying and preserving archival (historic, permanent) records.
• Developing a disaster preparedness plan to protect and recover records in the event of a disaster.
• Developing forms to maintain efficient operations.

(Continued on page 4)
President’s Message

This is the last issue of "Off the Record" until the fall. In the hiatus, keep up-to-date by visiting the ARMA International website: http://www.arma.org.

- Some of the places to look at are Education, Buyers Guide, Publications, Resources, Legislation and Policy Standards to name a few.
- A few titles of information for you at the ARMA website are: Rim and Privacy; ARMA International audio and web program archives; HIPPA Privacy Essentials; Sarbanes-Oxley Act.
- The ARMA Bookstore is online shopping which is easy and ARMA members receive a discount.

The Bookstore is the best place for books, briefings, videos and other resources relayed to information management.

You can also go to http://www.arma.org/publication/infopro/online.....where you can find out the recent “happenings” in the information profession as well as information you can use to assist your job and career.

At our local San Diego Chapter we have been pleased and proud to present various speakers from Records Basics presented by Bob Zornado to the Legal aspects of Records presented by John Montana. Our final speaker will be Steve Gray, our current Pacific Regional Director, and soon part of the International Board of Directors. Steve will be focusing on Ethics and business practices in regards to Records and Information Management. This promises to be a very special day for our San Diego members and guests.

This past year, the San Diego Chapter of ARMA has been excited to do some new (never done by this chapter) activities: 1) the ARMA-Night at the Mira-Mesa Soup Plantation – a fun-time....good food and part of the proceeds went to our organization for awards and conferences, 2) in December, we had a community-service night at KPBS as eight of the Board members gave an evening to assist the local Public Broadcasting station stumping for new-members and 3) last month – the San Diego Chapter had it’s first-ever......”tour”. This was held at the San Diego Natural History Museum and those who attended were able to have a “behind-the-scenes” look at the way they handle their vast amount to files, specimens, etc. That quick-glimpse certainly showed us the importance and complication of keeping accurate records for such diverse items.

So.....for now.....remember ARMA San Diego as the place to go for questions and assistance – WE are here to help. Check out our web-site: http://www.sandiegoarma.org, call any of the Board members or email your questions to the webmaster Cynthia Lacy and she will forward your inquiry to the proper person.

The San Diego Chapter will be having the next luncheon in September and ARMA International will be having their 49th Annual International Conference in Long Beach. The date for that is October 3 – 6—MARK YOUR CALENDARS!! It’s close so we hope that many of you will be able to attend.

DO have a great summer.....all activities that are fun – be safe and we will be looking for YOU at the September ARMA luncheon.....the date and subject will be on our website, in a flyer sent to the members and of course, in our newsletter.

For the coming year – be prepared to see new speakers, great ideas and many opportunities to learn!
Steve served two years on the Awards Committee, two years as a Pacific Region Coordinator and is currently a Region chapters and leadership conferences over the last fourteen years. He led interactive sessions on diversity and culture at three ARMA Annual Conferences.

San Diego ARMA Chapter—2003/2004 Officers/Directors

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<tr>
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<td>Hospitality</td>
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San Diego ARMA Chapter 12375 Kerran Street Poway, CA 92064

Meeting: Wednesday, June 10, 2004, 11:30 to 1:30 Location: Marriott Courtyard—Kearny Mesa

Reservations - Contact Linda Maczko @ (858) 534-3995

On-line RSVP: http://www.sandiegoarma.org/arma_registration.htm

**ETHICS EDUCATIONAL PROGRAM**

**RIM Ethics Star Search**

Do you want to be a Records and Information Management Ethics Star? Here's your big break! Guest speaker, Steve Gray will direct the ARMA San Diego Not Quite Ready for Prime Time Players (yes, that means you!) in performing several RIM ethics scripts. Come share an enjoyable interaction on business ethics relating to RIM professionals. Each script will stimulate discussion, and a model for ethical problem solving will be shared.

So who among San Diego’s membership will win the BIG FIVE STARS for the best performance of the day? Well, it just might be you! Break a Leg!!

Steve Gray is Corporate Librarian for World Vision’s International Partnership Office in Monrovia, California. He is responsible for information used for reference, statute, or organizational history purposes.

World Vision is an international Christian humanitarian organization supporting more than 40,000 projects in 96 countries touching the lives of over 85 million people. The organization assists the poor in sustainable community based development focusing especially on the needs of children.

Celebrating 33 years with World Vision, Steve has held a variety of administrative positions with the organization. In 1993 he was selected as “Employee of the Year” in the International Office.

Steve received his formal education from Point Loma Nazarene University, and cross-cultural/diversity training through World Vision courses. Active in ARMA since 1988, he has held several board positions including two terms as chapter president with the Upland Inland Empire Chapter. He was selected “Chapter Member of the Year” in both 1991 and 1994. At the Association level, Steve served two years on the Awards Committee, two years as a Pacific Region Coordinator and is currently Pacific Region Manager. As of July 1, 2004, Steve will begin a three year term as a Director on the ARMA Association Board.

Steve has spoken at numerous Pacific Region chapters and leadership conferences over the last fourteen years. He led interactive sessions on diversity and culture at three ARMA Annual Conferences.

This is our final chapter meeting of the fiscal year. It is important that you attend the election of your new ARMA Board of Directors.

Meeting Agenda

11:30 - 12:00 Registration and Networking
12:00 - 1:00 Lunch and Keynote Session
1:00 - 1:10 Announcement of ARMA Student Essay Contest Winners
1:10 - 1:30 Election of the Chapter’s 2004 - 2005 Board of Directors

Lunch will feature an outdoor Italian Buffet.

Please register early as seating is limited.
RSVP to Linda Maczko via phone: 858-534-3395 or mail to: lmaczko@ucsd.edu.

**President’s Message: Reflections**

Records Manager Technical Bulletins: Starting a Records Management Program

Establishing Records Retention

Interview with Joe Conroy

Dialing for Document Destruction Tips

Distance Learning / ISG

June Registration Form

FYI

Membership

Board Members

Inside

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