

Chapter of the Year Award submission

Chapter Name: Metropolitan New York City

Executive Summary:

Provide a brief summary (maximum of 750 words) of the chapter's activities throughout the current fiscal year.

The Metropolitan New York City Chapter of ARMA continues its leadership role in providing educational and professional development opportunities to chapter members by providing a variety of programs in the areas of records and information management as well as personal and professional skills development. The Board of Directors held 8 regular monthly Board meetings and 2 half-day planning sessions to help prepare for a successful year. This year, the chapter was extremely successful in consistently providing content-driven programs to its members and the community at large. The goal of the chapter was to focus on both the Core Competencies and GARP, recently developed by ARMA International. This focus enabled the chapter to emphasize skills and programs that RIM professionals need in order to move their organization forward in today's technology-focused environment.

The chapter conducted a total of 13 educational lunch and evening meetings. Each of these educational meetings corresponded to at least one Core Competency domain and level. In addition, the chapter also conducted one full-day workshop event, two CRM study sessions (covering both Parts 1-5 and Part 6), and two networking events for both members and non-members. Each educational meeting was attended by an average of around 50 attendees and the all-day event had well over 100 members and non-members in attendance.

For the first time, the chapter made a focused, concerted effort to reach out to other professional organizations. As a result of these efforts, several of our educational meetings were joint meetings, which benefited not only our chapter but their members and guests of those other organizations as well.

We reviewed our library and the Board allocated funds for purchasing new materials to provide current resources to our members. Any member in good standing may borrow any of our library's publications. Several of our members took advantage of this member benefit to prepare for the CRM examinations. We were able to purchase several recently released books and publications from the ARMA bookstore.

The chapter also continued recognizing the tenure of its members by awarding tenure pins to those who had reached a milestone, from those who have been members for 5 years on up to those with over 30 plus years of dedication to ARMA and the chapter.

A number of our members are very passionate about helping out in their communities. The chapter encourages our members to support their communities by providing resources for marketing their community programs and encouraging our members (and guests) to participate in the various activities.

We ended the year in June with our annual "Member and Vendor Appreciation" event, honoring our chapter award winners, recognizing our supporting vendors and announcing and introducing next year's Board members.

Chapter Characteristics:

Membership as of July 1: 303

Board Format:

- Number of board members for the fiscal year: **11**
- Number of returning members to the board for the fiscal year = **9** (including those in the middle of their term or having switched positions on the board in consecutive years)
- Number of new members to the board for the fiscal year: **2**
- Does your chapter have a mentoring program? **YES / NO**

SECTION 1: EDUCATIONAL/PROFESSIONAL DEVELOPMENT *(Total Points Possible 75)*

Meeting Format

- Monthly
- Bi Monthly
- Quarterly
- Other : One evening and one noon meeting monthly (except winter)**

Date	Time/ Location	Topic	Presenter(s)	Members Attended	Non- Members Attended
Sep 20	ARMA@Noon/ NY Life	"A Cubic Foot of Storage is Worth a Thousand Images" "Reflections on Scanning vs. Off Site Storage"	Fred Grevin	38	0
Sep 21	Evening/ The Muse	Who Knew the Egyptians Helped us with Digital Records?	Greg Hunter	55	1
Oct 6	Day/ NY Life	CRM Parts 1 – 5 Study Sessions	Lauren Barnes, CRM Karen Smith, CRM Jason C. Stearns, CRM Anita Castora, CRM Susan Goodman, CRM Lenore Greenberg, CRM	12	0
Oct 7	Day/ NY Life	CRM Part 6 Study Session	Galina Datskovsky, CRM Jason C. Stearns, CRM	3	0
Oct 14	ARMA@Noon/ NY Life	Records Management for All: Stories from the Non-Regulated (Media/Entertainment) Sector"	Marcel Rodriguez Mary Sherwin	40	2

Date	Time/ Location	Topic	Presenter(s)	Members Attended	Non- Members Attended
Oct 20	Evening/ The Muse	Why the Title CIO Is a Lie	Barclay Blair	59	3
Nov 18	Evening/ NY Life	Preservation, Legal Hold and Data Accessibility	Panelists: Stephen P. Dooley Joanne Lane Nick Eglevsky Moderator: Derick Arthur	68	9
Nov 23	ARMA@Noon/ NY Life	SharePoint 2010 and Records Management	Russ Edelman	51	4
Jan 25	Evening/ CJH	Wiki Leaks	Co-sponsored with Archivists Round Table (ART) of New York City	68	12
Feb 22	ARMA@Noon/ NY Life	U R What U Tweet: Social Networking for the Professional	Donna Severino Bonnie McEwan	15	2
Mar 15	All Day/ NY Life	Spring Workshop/Seminar	Various speakers	94	35
Mar 29	ARMA@Noon/ NY Life	Connecting the Silos: Applying RM to All Functional Areas	Doug Brown, PMP	27	3
Apr 21	Evening/ The Muse	Electronic Data Discovery Process, and Its Importance to Records Management	Sal Llanera Lenore Greenberg, CRM	26	3
May 17	Evening/ The Muse	The Manager in "Records Manager": "You mean I have to manage people, too?"	Stuart Brooks	43	6
May 24	ARMA@Noon/ NY Life	Personal Health Records: Consumers as Gatekeepers, Records Professionals as Facilitators	Sofia Empel, CRM	18	5
Jun 28	ARMA@Noon/ NY Life	Nuts and Bolts of Building an Enterprise Taxonomy	Eugene Stakhov, CRM, CDIA+	20	17

Provide a description of the educational/professional development activities of the chapter during the fiscal year in addition to the above information. (*Maximum of 750 words.*) See COTY award description for examples of what to include.

The Metropolitan New York City chapter of ARMA International strives to enhance and promote the profession of records and information management; to afford RIM professionals in our area, both members and non-members, the opportunity to exchange ideas, learn about developments in the field, and leverage our vast collective knowledge. The Board of Directors and Committee members spent many hours bringing fresh ideas and topics, and exciting and educationally relevant programs to our members, all centered on furthering their professional skill sets and RIM knowledge. Each educational Chapter meeting corresponds to a domain and level of the ARMA Core Competencies. We have had a very enthusiastic response from our members at each of our educational, networking and collaborative opportunities. These included:

- **Educational Meetings (Evening):** Monthly educational evening meetings, including marquee speakers presenting on relevant topics, dinner and networking time for members to truly appreciate the diversity of the Metropolitan New York Chapter and its broad membership base.
- **Educational Meetings (Afternoon):** Held lunch-time learning sessions, called **ARMA@Noon**, offering attendees an opportunity to enjoy a catered lunch while learning hands-on from industry experts on a wide variety of topics.
- **Newsletter:** Redesigned our **newsletter** to include a consistent New York look-and-feel, and added new content from all areas of the Chapter to keep members interested and informed about chapter activities, job opportunities and events throughout our region and other areas.
- **All-Day Workshop:** Partnered with the Northern and Central New Jersey ARMA Chapter to hold our **annual all day educational workshop** and **vendor exhibit** that is on par with national conferences, offering three educational tracks spanning the entire day, and covering all six domains and various levels of the ARMA Core Competencies.
- **Collaboration:** **Collaborated with professional organization partners** Archivists Round Table, Special Libraries Association, AIIM and American Health Information Management Association to develop joint meeting programs for members of their respective disciplines to interact and share ideas, and foster interdependence in an increasingly smaller world.
- **Legislation and Regulatory Affairs:** Carefully **monitored legislative and regulatory items** that affect the profession and summarized them in our monthly newsletter publications.
- **CRM Exam Preparations:** Provided two **CRM Mentoring and Study Group** programs to enhance the level of professional education.
- **Library Resource:** Provided publications and other information via its **Lending Library Program**.
- **Community Efforts:** Generously **contributed time and money** to local community efforts.
- **Tenure Pin and Award Recognition:** **Presented tenure award pins and certificates** to those individuals with ARMA membership of 30 years or more.
- **Tenure Pin Recognition:** **Presented tenure award pins** to those individuals with between 5 and 30 years of ARMA membership.

SECTION 2: PROJECTS *(Total Points Possible 60)*

Provide a description of the projects of the chapter during the fiscal year in addition to the above information. *(Maximum of 750 words.)* See COTY award description for examples of what to include.

The Metropolitan New York City Chapter undertook several special projects this year that were designed to address unique needs, promote the chapter and benefit our community. These special projects included:

- **ARMA International Educational Foundation:** The Chapter **donated** a set of framed photographs of iconic New York City landmarks taken by one of our Chapter Members to the AIEF Silent Auction held at the Annual Conference in San Francisco, California.

- **Annual Holiday Networking Meeting:** Sponsored a combined **annual networking opportunity** and holiday celebration. This annual meeting provided another opportunity for networking and discussing mutual records management and information technology challenges. Over eighty (80) people attended this well-received annual event. During this time, members and guests had the opportunity to gather, network, and celebrate the holiday season.

- **Member and Vendor Appreciation Night:** Conducted a **Member and Vendor Appreciation Night to “Thank” our vendors** for their continued support via meetings, newsletter, and web links and to recognize and award **our outstanding members**. In June, we annually hold an awards dinner and vendor appreciation evening. This year, as in past years, we announce and recognize the Chapter Leader of the Year, the Chapter Member of the Year, the Honored Member of the Year and the New Chapter Member of the Year recipients.

- **Automated Meeting Registration Process:** In addition to revising our web site, we **utilized an automated meeting registration process** for all members and provided access for non-members, as well.

- **Chapter Library:** Our **lending Library** has been reinvigorated and a new listing was created and made available via our new web site. The library now **has over 75 titles** of current and historical publications as well as over 1400 digital articles.

- **Monthly Community Service Articles:** Our Chapter continues in its commitment to the community at large and to help connect its members and newsletter readers to the events. Our newsletter regularly spotlights volunteer and donation opportunities available each month in our newly created **regular feature article** entitled, “Community Service Corner”.

SECTION 3: PUBLIC RELATIONS *(Total Points Possible 30)*

Provide a description the public relations activities of the chapter during the fiscal year in addition to the above information. *(Maximum of 750 words.)* See COTY award description for examples of what to include.

Over the last year, we have realized that one of the best ways to promote the profession is to build and promote the skills and capabilities of our professionals. This has been combined with more sophisticated targeted marketing which has garnered a great deal of recognition for ARMA locally and internationally. The following summary briefly explains some of the steps taken to accomplish this:

- **Chapter Newsletter:** We have changed our newsletter from a word press publication with a minimum number of feature articles to be a full magazine style publication. Our last three issues have been just under thirty pages with almost twenty pages of educational content. The magazine is published bi-monthly (six times a year) with two additional special issues. In addition to distributing to members, we have distributed our publication at many other meetings including LegalTech, SharePoint Users Group (SPUG), ILTA (International Legal Technology Association) and AIIM International (AIIM).
- **Collaboration:** Our profession spans many competencies in several domains. The ARMA Core Competencies make obvious our synergy with other organizations. Collaboration has become a key component of our program. Last year we have had meetings with the East Coast Association of Litigation Support Managers (ECALSM), HIMANYC (Health Information Management Association of New York City), the Archivists Round Table (ART), the Special Library Association (SLA) and AIIM. All of these efforts have increased awareness and brought in new members. Our plan is to continue these alliances and foster new ones with the Association of Legal Administrators (ALA), LegalTech, the New York Bar Association and several other organizations.
- **Outreach Program to Academic Programs:** Several of our Board members have been guest teachers in the graduate programs of Columbia University and Queens College. We also have two Board members who are adjunct Professors at these schools. In addition to encouraging students to seek employment in our profession, there has been recruitment to join ARMA as student members. We have also had several meetings where we encourage students to attend by offering special discounted pricing.
- **Promotional Tri-Fold Chapter Brochure:** Our tri-fold marketing brochure was redesigned specifically to appeal to potential new members. The brochure lists the benefits of membership as well as provides information on upcoming meetings and Board contact information. We bring these to college programs, ILTA, SPUG, AIIM, ALA and the SLA meetings.
- **Advocacy Initiative:** This year the chapter joined with the Archivist Round Table (ART) to present a panel discussion on WikiLeaks and its impact on our profession. The meeting gained media attention and has already been replicated in different parts of the world including Australia. The link to the site (which contains the video of the discussion) has received thousands of hits.
- **Legislative Efforts:** Recently, the chapter has been involved with the Special Library Association (SLA) and had meetings with the New York City Council to petition them not to include DORIS (NYC Department of Records and Information Services) with the NYC Department of Citywide Administrative Services.

SECTION 4: CHAPTER MAINTENANCE *(Total Points Possible 20)*

Provide a description of the chapter maintenance activities of the chapter during the fiscal year in addition to the above information. *(Maximum of 750 words.)* See COTY award description for examples of what to include.

- **General Membership Meetings and Notification:** The chapter had 5 monthly dinner meetings. Notifications were sent via cVent, a meeting planning and management tool. Notifications went to members, recent meeting attendees, guests and others who are members of other RIM-related organizations. The chapter also held 9 ARMA@Noon meetings. These meetings attracted a different audience as they were during the day and at a lower cost. We also held our annual all day educational event offering 3 tracks and a total of 10 sessions. All meetings addressed a variety of competencies and domains.
- **Board Meetings:** We had 11 monthly Board meetings starting with a half day planning session in July. Like last year, we again had a mixture of in-person meetings and conference calls. Minutes were taken at all of the meetings and prepared for Board review. Participation at the committee level greatly increased this year and several committee members show promise as future chapter leaders.
- **Surveys:** After an event, we poll individuals via telephone calls to obtain meeting feedback. Our VP of Professional Development gathers all comments and discusses them with his committee. Twice annually we send out an electronic survey using Survey Monkey. This survey focuses on individual meetings and asks for suggestions for future meeting topics. The survey results are summarized in a report for the Board's review.
- **Membership:** On July 1, our membership totaled 303. The VP of Membership and associated committee, along with the VP of Collaboration, actively sought out potential new members and provided information on the benefits of joining. In addition, these potential new members were added to our contact database and received notifications of upcoming events. They also received a letter and brochure encouraging them to join. As a result of these efforts, **as of June 16, 2011 our membership increased to 328.** In collaboration with board members and membership outreach into the student community throughout the New York metropolitan area, we brought many first-time attendees to our meetings, many of whom then joined our chapter.
- **Financial Administration:** The VP/Treasurer maintains the chapter's financial records utilizing QuickBooks. Reports for review indicating all expenses and income are distributed at each Board meeting. Categories have been created for reporting purposes and were reviewed by an external CPA. Our goal is to find category titles that satisfy reporting criteria for ARMA International and also provide easy analysis by our Board members. The chapter has enjoyed a surplus on several events and is frugal in the disbursement of funds for Chapter events. Each July, an outside audit is conducted and recommendations are made to the Board of Directors based upon these findings.

- **Nominations/Elections Ballot:** An election ballot listing the nominees for the elected positions for the Board of Directors was sent to all members via Constant Contact. The votes were tallied by the Nominations Committee and the election results are reported to the membership at the June Appreciation and Awards Event.
- **Awards:** The outstanding achievements of Chapter Members will be recognized with special awards at our annual June event.
- **Chapter Pin:** Like last year, we held a contest asking chapter members for ideas for a pin design. The winning design was a blinking pin of the New York City subway system and the winner received a gift certificate. The pins were distributed to members at the Chapter Meeting just prior to the annual International Conference in October, 2010.
- **Tenure Pins:** We, again, honored members who have been with the chapter for at least 5 years or longer (some over 30 years) with a pin designed to commemorate their tenure.
- **Facebook:** ARMA Metro NYC took the plunge into the world of social networking by deploying a Facebook page (<http://www.facebook.com/pages/ARMA-Metro-NYC-Chapter/132515626816717>). It was initially setup to promote our All Day Educational Conference. It will be updated with news, event recaps and announcements as we continue to build our Facebook community.
- **Twitter:** During the 2010/2011 ARMA Metro NYC created a Twitter account to promote our events. Additionally, using the hash tag #ARMANYC members have been able to follow a “live tweet” of several of our educational sessions.
- **Content Management:** 2010-2011 also marked the year that ARMA Metro NYC took an active step in managing its own need for a content and project collaboration portal. The Chapter has engaged the cloud-based technology offering of Basecamp (<http://www.basecampHQ.com>) to communicate, store various electronic assets such as speaker information, and plan events.

SECTION 5: OUTSIDE ACTIVITIES/CHAPTER MEMBER *(Total Points Possible 10)*

Provide a description of the outside activities of chapter members during the fiscal year in addition to the above information. *(Maximum of 750 words.)* See COTY award description for examples of what to include.

Anita Castora, CRM, was a speaker at ARMA International’s annual conference held in San Francisco, CA, November, 2011. She co-facilitated (with another chapter member – Jason Stearns, CRM) a session entitled “Train the Trainer – RIM Training for the Masses”. Anita has also spoken at several organizations and chapters on RIM topics and recently presented “RIM 101” to the ARMA Connecticut Chapter.

She was a contributor and Project Manager for ARMA Guidelines that included: Contracted Destruction of Records and Information Media and Glossary of Records and Information Terms. Anita was on a

Regional Educational Committee that developed a survey sent to all ARMA Chapter Presidents, Education Directors and Chapter Regional members. It captured some best practices and valuable information that was sent to ARMA International for their use.

Anita promotes RIM at her company and conducts an annual RIM training and clean out. She is the past-president of the ARMA Connecticut Chapter and on a committee that is updating its records retention schedule.

Lauren Barnes, MLIS, CRM, volunteers many hours in her community. She was instrumental in organizing the Chapter's Just Tell.org community event, and is a founding member of their Board of Directors. She also serves on the School Leadership Team of a local high school and is a registered Red Cross Volunteer. Lauren is an adjunct Professor in the Graduate School of Library and Information Studies at Queens College in New York City.

Melissa G. Dederer, CRM, was a speaker at ARMA International's annual conference held in San Francisco, CA, November, 2011. The topic was "Data Mapping 101: Preparing for a Successful Conversion". Over 100 attended the 1 ½ hour presentation/workshop. Attendees were provided a basic understanding of databases and provided some hands-on exercises by mapping legacy data to a new system.

Melissa is on the Northeast Region Treasury Committee and was also on the Educational Development Committee (EDC) for ARMA International. The EDC developed nine educational sessions that have been, and continue to be, finalized and made available as training modules via International's website. Melissa also developed and presented a webinar for ILTA (International Legal Technology Association) in June. The live webinar was co-presented with Terry Coan, CRM (a past President of ARMA International) and was titled "Data Disposition: Out with the Old, in with the New". It was attended by 23 groups of attendees.

Frederic J. Grevin, taught a graduate-level records management course at Columbia University's School of Continuing Education, Information and Digital Resource Management program (now Information Knowledge Strategy).

Fred also presented at the ARMA Long Island and New York City Chapters on "Functional Retention Schedules" and presented on "Digital Preservation" to the Conservation class at Queens College Graduate School of Library and Information Science.

Marcel Rodriguez, ERMp, spoke at an ARMA Connecticut Chapter meeting on "Back to the Future: The Challenges of Managing Records for a Global Media Company". He gave an overview of the Document Management program at NBCUniversal and discussed the challenges of managing records for a global company, including focusing on using GARP principles to improve employee awareness, implementing a solution for managing physical and electronic records, training, compliance monitoring and collaboration techniques for the successful implementation of program initiatives.

Eugene Stakhov, CRM, CDIA+, founded the GARP® Technology Development Foundation, whose mission is to promote the development of software and technology that is guided in part by the Generally Accepted Recordkeeping Principles®. The Foundation is laying out the design for a software

development framework that will enable developers to use pre-built classes with recommended attribute-method sets that incorporate the fundamentals of GARP®. Eugene will be presenting on this initiative at the 2011 ARMA International Conference in Washington, D.C.

Jason C. Stearns, CRM, was one of several contributors to the recently published ARMA/ANSI standard “Implications of Web-Based, Collaborative Technologies in Records Management”. Jason also facilitated numerous educational sessions for ARMA International, local chapters and at other educational workshops.

Jason graduated from the University of Oregon (UO) with a Masters in Applied Information Management. He also received the UO AIM Capstone Award for his research paper “Employing the Generally Accepted Recordkeeping Principles (GARP) to Identify Practices for Efficient and Compliant Electronic Records and Information Management”. Capstone Criteria includes excellence in the: (1) execution of the overall research process; (2) depth of the research design; (3) quality of the research outcomes for the intended audience; and, (4) overall strength in AIM coursework. The paper has since been published by UO and is being developed into a two part web seminar for ARMA International.

SUMMARY *(Total Points Possible 5)*

Explain why you feel your chapter is deserving of the Chapter of the Year. (Maximum of 500 words.)

The Board of Directors of the Metropolitan New York City Chapter was instrumental in ensuring the chapter had a very successful year. That success was determined by several factors, including providing outstanding educational opportunities to our members (and non-members) as well as being fiscally responsible.

In addition to our annual CRM Study Sessions and All-Day Workshop, the Chapter provided 14 educational sessions covering a variety of topics, ranging from personal and professional skills development to current issues, such as e-discovery related issues, in records and information management . To assist attendees with deciding which events would be most beneficial, all educational sessions corresponded to a Core Competency domain and level. Some of the educational sessions were held during the day (lunch time) and others were conducted at night (dinner meetings). This provided our members and non-members ample opportunity to choose events that met their educational needs, time and budget constraints.

We were heavily involved in collaborating with other professional organizations to provide joint meetings as well as encouraging our members to attend meetings of interest of other organizations. By collaborating with these other groups, we were able to recruit new members to our chapter.

The Board also continued with honoring its members by recognizing their tenure. The Board awarded tenure pins to those who had reached a milestone, from those who have been members for at least 5 years on up to those with over 30 plus years of dedication to ARMA and the chapter.

The chapter reviewed its current library inventory and identified deficiencies. The Board took immediate action to authorize funding to purchase some recently published books from ARMA International’s bookstore. The Chapter has a formal lending procedure and announces this member benefit at each meeting.

The Board closely monitored its finances throughout the year, analyzing not only their overall financial situation but also determining profit/loss of each event. By closely monitoring their finances, the chapter was able to maintain (and slightly increase) their revenues for the year.

Many of our members were deeply involved in community service related activities as well as offering their time to present a variety of topics to other ARMA chapters and RIM-related organizations. A couple of our members have also been involved in teaching at local colleges and universities.

And, finally, each June, the Board holds an annual Vendor and Member Appreciation event to acknowledge the generous support we receive from our vendors and honoring our outstanding members of the year.

Once again, the Board and its committee members were instrumental in providing an extraordinary year that included numerous educational opportunities, covering a wide range of topics and skill levels, as well as providing networking and appreciation events. Overall, based on feedback from our members and guests, we had an extremely successful year.