



***Business Forms Management Association's***  
**37<sup>th</sup> International Symposium on Forms and Information Systems**

***...Your business reborn***

***May 20-26, 2006 ■ Squaw Peak Hilton ■ Phoenix, Arizona***

Name, Title

Date:

To:

The Business Forms Management Association's (BFMA) 37<sup>th</sup> International Symposium was a truly rewarding and enriching experience. I found the conference extremely valuable and thought provoking and I am grateful to you and Bryan for allowing me to be a participant. I can't begin to describe the value gained from the networking in particular. I was very impressed with the quality and variety of environments that were presented to encourage networking and sharing with the 300 attendees. Each day was a major decision about which course to take, which Vendor Suite Demo to sign up for, should I take in a lecture or reserve time for a vendor one-on-one? Or more often, I found myself wondering, "How can I meet up with that person I met from the Mayo Clinic so we can finish where we left off this morning? And who knows Rune, the barcode guru and can introduce me? I can describe the experience as intense, surprising, rewarding and jam-packed with possibility. And priceless.

The BFMA is a global network of form and information systems professionals committed to increasing productivity through forms systems improvements: improved workflow, effectively leveraged technology and standardization. Its purpose is to provide quality forms systems education and networking opportunities to enhance individual competency and advance the sound, innovative use of forms and documents – both print and electronic – needed for businesses to succeed.

All facets of forms and business process management are covered. Educational courses cover everything from basic forms design and analysis, forms management, and workflow analysis to advanced courses on e-signatures, PDF JavaScripting, and building enterprise content management systems. Current hot topics are also covered such as bar code technology, accessibility standards, and Sarbanes-Oxley

### **Key Messages**

- Development of standard data dictionary and a data administration model/infrastructure. Rule: Pluck data once, share multiple times.
- Some Forms Management work needs to be completed in the area of policy development, marketing, benefits tracking and ROI analysis to better align our program with the upcoming national standard.
- We will likely need a technical specialist supporting the Program to effectively leverage our electronic forms software
- I wholeheartedly support the attendance of Forms Management staff at future Symposiums, assuming available budget. Management, technical specialists, analysts and designers will all benefit enormously from this world-class educational experience.

## **Forms Management Action Plans**

- Develop a standard data collection set for forms, and ensure their consistent application across all forms. (i.e. last name, first name, middle name)
- Develop a reporting tool related to Forms Management cost savings, new form development, form standardization and obsolescence.
- Develop some training on forms as data capture tools and focus on accuracy and integrity (partner with HSQI/IM?) (i.e. if 80-100% of public use forms have errors in them, then how value is our data to daily operations and strategic planning). How can the Forms Program help improve data capture?
- Education to Form Owners and administrative staff. (again)
- Do more marketing with Management teams to communicate the benefits of effective forms management, including improved data capture and communication and process and resource efficiencies.
- Improve linkages and connections to Records Management Program. Look for opportunities to apply classification codes on forms in the design stage to assist with filing, records retention etc.

### Possible barriers

- Lack of data administration model/infrastructure
- Lack of Forms Management resources to support initiatives
- Lack of IT resources to support forms initiatives

### ***Key Networking Contacts***

<b><i>Name</i></b>	<b><i>Title</i></b>	<b><i>Organization</i></b>
<i>Robert Barnett</i>	<i>Managing Director</i>	<i>Robert Barnett and Associated Pty Ltd.</i>
<i>James Bennett</i>	<i>Data, Forms and Records Coordinator</i>	<i>Wisconsin Dept of Public Instruction</i>
<i>Carol Casper</i>	<i>Publishing Analyst</i>	<i>Mayo Clinic</i>
<i>Mario Charette</i>	<i>Manager, IM</i>	<i>Dept of Correctional Services Canada</i>
<i>Pamela Colbert</i>	<i>Business Operations Lead</i>	<i>The Boeing Company</i>
<i>Carol Cousineau</i>	<i>Mgr. Business Process Analysis Section</i>	<i>Royal Canadian Mounted Police</i>
<i>Jamie Foley</i>	<i>Forms Analyst</i>	<i>Department of National Defence Canada</i>
<i>Franklin Garner III</i>	<i>President &amp; CEO</i>	<i>Amgraf Inc.</i>
<i>Ben Graham</i>	<i>President</i>	<i>The Ben Graham Corporation</i>
<i>William Hill</i>	<i>Forms &amp; Records Manager</i>	<i>Department of Labour and Industries</i>
<i>Alice Ladd</i>	<i>System Forms Administrator</i>	<i>Mount Carmel/St. Ann's Hospital</i>
<i>Donna LeBlanc</i>	<i>Forms Analyst/Designer</i>	<i>Public Safety and Emergency Preparedness Canada</i>
<i>Judy Lundy</i>	<i>Systems Analyst</i>	<i>Mayo Clinic</i>
<i>Judi McClellan</i>	<i>Anatomic Pathology Office Supervisor</i>	<i>University of Minnesota Medical Center</i>
<i>Ronald Moorhead</i>	<i>Forms Standardization Officer</i>	<i>Canadian General Standards Board</i>
<i>Bet Morash</i>	<i>Business Systems Analyst-Forms</i>	<i>City of London</i>
<i>Andrew Palatka</i>	<i>Executive Director</i>	<i>BFMA International</i>
<i>Tara Pomrenski</i>	<i>Forms Analyst</i>	<i>City of Calgary</i>
<i>Lawrence Reeve</i>	<i>Project Manager</i>	<i>NASA Ames Research Centre</i>

### ***During the course of Symposium I attended the following courses and events:***

#### ***Newcomer's Reception*** (Networking)

Welcome by the President included an overview of the weeks activities and tips on getting the most out of your Symposium investment.

### ***01 Writing your Symposium Report*** (Lecture)

Instructor: Judi McClellan, Anatomic Pathology Office Supervisor, U of Minnesota Medical Ctr  
BFMA recognizes that the cost to send employees to Symposium is considerable. This session was designed to educate first-timers on the how-to of writing an effective symposium report. I hope that this report will provide ample evidence of the value of this conference. This session also gave the newbies plenty of tips on effective networking during the Symposium. The course was taught by Judi McClellan, who, having gotten involved with BFMA early in her career, has never missed a Symposium, even though she formally left Forms Management 15 years ago because she believes that the education at Symposium can be applied in any business environment.

### ***06 Using Detail Process Charts to Support Effective Improvement Programs*** (Lecture)

Instructor: Ben Graham, President, Ben Graham Corporation

A course for experienced process analysts and extremely helpful to me as I prepare our own methodology for business process analysis as part of the Intelligent Electronic Forms Project. Ben covered the detailed preparation process prior to any process improvement project, including: defining the project; forms used for data gathering; initiation of the project; how to get the right people involved; dispel fears and resistance and how the process analyst acts as a key facilitator. Similar to his book *Detail Process Charting*, but it was useful to be able to address specific challenges.

### ***IceBreaker Reception*** (Networking)

Symposium attendees engage in an annual feeding frenzy. Attendees bring handfuls of pins/stickers representing their organization/home town and exchange them during an evening of food and entertainment. Great way to meet *everyone* in one evening.

### ***Keynote Breakfast*** (Presentation and Networking)

Speaker: Shankar Sitapati, Manager, Chapter Corporate, The American Red Cross

Presentation: *Forms, The Information Backbone of Disaster Relief Efforts*

Mr. Sitapati gave a presentation on the key role of forms and forms management in the context of Hurricane Katrina. The American Red Cross has a dynamic forms management environment and many of their forms are available as electronic templates, however the lack of available infrastructure forced the American Red Cross to fall back on their paper-based systems. He spoke to forms as critical disaster services tools and reminded us all to think how our own forms would perform in a crisis. His presentation highlighted the essential nature of forms and the need to have a back-up paper plan at the ready.

### ***14 Mayo Clinic Forms Program*** (Lecture)

Instructor: Carol Casper, Publishing Analyst, Mayo Clinic

An outstanding presentation on the Forms Program at the Mayo Clinic, established in 1946. At the Mayo Clinic every physician is a Vice President and they have 1626 physicians. Add to that a staff of 45,000 and it took them 8 years to standardize forms between two facilities: St. Mary's and Rochester (driven the JCAHO and HIPAA). March 20, 2005 marked the final day for paper chart creation. They have gone to a paperless health record. Their program included patient information pamphlets and other publications... basically all ink-on-paper. They have 17,000 official publications (managed by 7 publishing analysts) and an ongoing 'rogue' form problem. ☺ Key messages: *any form, regardless of intent, can end up on a chart*. They put form numbers on screen shots in their electronic health record and form numbers on their webpages and focus on their analysts truly understanding their customers business/clinical processes. Before they went paperless in 2005, their in-house print facility was using a semi-tractor load of paper *every 4 days*.

### ***Vendor Luncheon and Exhibits*** (Networking)

Visited multiple vendor booths to see demonstrations of available software and software in development.

***S2 Special Interest Groups: Healthcare*** (Forum)

Moderator: Judy Lundy, Systems Analyst, Mayo Clinic Forms Program

Special Interest Groups are forums sponsored by BFMA International to address the forms and informational needs of specific industries. Facilitated by moderators, the forums are designed to build a trust dialogue, including shared problems, ideas and solutions. SIGs are scheduled early in Symposium so that you have a chance to connect with other professionals in your industry and network with them throughout Symposium as well as establish long term professional alliances. I can now honestly claim to have 'friends' at the Mayo Clinic and I intend to wield that stick every chance I get. Healthcare representation included: DTHR (Canada), Interior Health (Canada), Allianz Life Insurance, Premera Blue Cross, Mayo Clinic, US Dept of Health and Human Services, Mount Carmel-St. Ann's Hospital, University of Minnesota Medical Center, Fort Atkinson Family Clinic, Hospice of the Valley.

***BONUS:*** Meeting with national Forms Management Program Standards Committee to prepare Tuesday presentation. Presentation was divided up between Ron, Carol, Donna and myself. Expected questions and challenges were reviewed and responses practiced.

***Vendor Suite Showcase*** (Networking and vendor product presentations)

Monday evening provided attendees with the opportunity to visit the vendors showcase and preview the various forms software available as well as mingle with other forms professionals. Many of the vendors had games and snacks, making the evening fun as well as informative. Although we have already chosen our software, it was valuable to visit other vendors to see what they had to offer and upcoming changes in e-forms technology.

***BONUS:*** One-on-one with Amgraf President Franklin Garner III, who took an hour to walk me through several of the features of our new software and answer questions.

***Recognition Luncheon*** (Networking)

This luncheon included Chapter/Member excellence awards and plenty of time to meet more people.

***34 Running a Forms Management Program: The Proposed Canadian Standard*** (Panel)

Ron Moorhead, Forms Standardization Officer, The Canadian General Standards Board

Carol Cousineau, Mgr, Business Process Analysis Section, RCMP

Donna LeBlanc, Forms Analyst, Public Safety and Emergency Preparedness, Canada

Kelly Halseth, Regional Coordinator, Forms Management & Production, David Thompson Health Region

Tara Pomrenski, Forms Analyst, The City of Calgary

Our panel presented a proposed national standard for Forms Management Programs (FMP). This standard, currently in editing, is expected to go to vote in the Fall of 2006. This 3-hour session provided an overview of best practices regarding: starting a FMP; establishing forms management policy; securing upper management support; defining the scope of authority and responsibilities; finding an appropriate home in the organization; calculating and justifying resource requirements; measuring success; reporting to management; establishing interdepartmental alliances; setting staff core competencies and output standards; and conducting end-user training/orientations. I presented specifically on staffing core competencies and our cost-recovery operational model, which raised the largest number of questions. All panel members participated in general question and answer. Feedback sheets rated presentation as very good and comments included: *Best session of Symposium* and *Definitely offer again next year*.

Gutwrenching but fabulous.

***President's Banquet and Ball*** (Networking)

The President's Ball was a very welcome mid-conference break. The evening included dinner, a stage show and dancing. The evening culminated with a small private gathering in the BFMA Executive Director's suite.

***42 The Esso Gas Plant Explosion-Lessons for Forms Management*** (Lecture)

Instructor: Robert Barnett, Robert Barnett & Associates Pty Ltd, Australia

An important session of anyone interested in solving business problems through better Forms Management presented by the guru of Forms Management. An explosion at Longford, Australia killed two men, injured eight others and cut gas supplies to 3.2 million residents of Melbourne for two weeks. He demonstrated how the issues uncovered by the inquiry related to Forms Management and hammered home the need for thorough process review before you immortalize a process by making it electronic. Also stressed the critical nature of error analysis and commented on the recent creation of 'Knowledge Management' departments...and how if 80-100% of public use forms have errors on them, (which is common in error analysis studies), exactly what are they managing? Hinted that we should be thinking about this if we/our organization use data from these forms for planning or decision making.

***50 Everything you Wanted to Know about the IRS Tax Forms Composition Process ...***

Instructor: Karen Gill, Forms Management Analyst, IRS

The IRS uses the same software that the Forms Management Program- DTHR recently purchased to develop electronic forms. This presentation demonstrated how the IRS Forms Management Analysts, working with their stakeholder departments, committees and US tax law specialists develop and distribute their taxation forms as fillable pdfs on the internet. The presentation demonstrated the immense power of the Amgraf OneForm Designer Plus, and highlighted how crucial is the support Sr. Mgmt and IT in electronic forms development. To see some of the forms developed in OneForm Plus and demonstrated during the presentation visit <http://www.irs.gov/>

***Networking Luncheon*** (Networking)

Everyone was encouraged to sit with strangers and get to know more new people. *Frequent flyers* (including myself) on Formspace (the BFMA online forum) were invited to sit together to put faces to the names regularly featured responding to member questions.

***55 The Boeing Forms Library and Forms Online Retrieval Management System*** (Lecture)

Instructor: Pamela Colbert, Forms Specialist, Business Operations Lead

Presentation outlined the Boeing Forms Library and the non-standard office environment of the Forms Management Team (they work from home). Pamela described a recent project to convert all Boeing Forms history files, previously paper based, to an electronic filing system. She also described the Boeing External Forms Library that allows all Boeing partners, customers, suppliers, and retirees to access, complete and submit forms to Boeing electronically. Pamela and I have been emailing over the last several weeks regarding major standardization and forms reduction initiatives.

***BONUS:*** Dinner with Dr. Ben Graham and Ben Graham.

As we have already purchased his software, I was delighted at the opportunity to discuss process mapping initiatives and ask some specific questions related to the use of the software and some limitations and challenges we had encountered. I was regaled with fascinating tales of process improvement experiences. Dr. Graham identified that Six Sigma Black Belts practitioners commonly used their methodology in their process improvement projects.

### ***68 Viewing Forms from a Data Perspective (Lecture)***

Instructor: James Bennett, Data, Forms and Records Coordinator, Wisconsin Department of Public Instruction

I considered this the best presentation of the conference. An extremely thought-provoking presentation on the 'big-picture' of data and forms role as *data collection tools*. James focused on the importance of data accuracy, integrity and availability and forms as *capture* (front-end) to data administration and records management. He described the State of Wisconsin, Department of Public Instruction's major project to integrate data collection, and eliminate multiple collection points (databases) and develop a single database infrastructure to support operations. He defined types of data as operational, tactical and strategic and critical to organizational planning and decision making. Outlined how data standards comprise the rules for defining, documenting and naming data and how a well-defined structure can greatly assist in the access and transmission of data. He explained that the exchange of information is facilitated, understanding is increased, consistent answers are obtained and operational effectiveness is improved through the use of data management techniques in the design of forms. While our Forms Program has always had an eye to data capture and integrity, he clearly demonstrated true excellence in data collection and administration. We had a chat at the end of the presentation and he indicated that he would be willing to share with me their Data Dictionary, a 647 entry list of data standards that took a state-wide committee 4 years to develop.

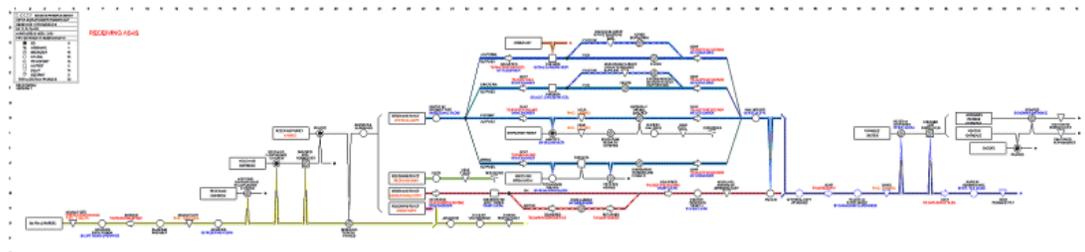
### ***Special Session 2 Process Management and Flowcharting (Lecture & Workshop)***

Instructor: Ben Graham, President, The Ben Graham Corporation

Dr. Ben Graham, Chairman, The Ben Graham Corporation

The DTHR-Forms Management Program recently purchased Graham Charting Software, which is an application dedicated to effective process charting. This session covered: managing and operating continuous improvement. Included recommendations on how to build and maintain a list of processes for study, how to organize those studies and how to maintain records of benefits gained; workflow and how to build process charts and assemble them in a workflow library. Included insights on how to build continuous improvements efforts into the organization....to institutionalize them. Outlined specific records, reports and management interventions that give structure and permanence to a continuous improvement program.

Sample chart below.



**BONUS:** Dinner with Mario Charette and James Foley and two hour discussion with two ex-Records Management professionals transplanted to forms on Forms Management and Records Management principles and best practices. Both are employed by the Canadian Federal Government and had plenty of insights into the linkages between Forms and Records Management.

***Other Courses attended:***

***07 Increasing the ROI from Forms and eForms within Enterprise Applications*** (Lecture, Product oriented)

Instructor: Mark Seamans, SVP Worldwide Product Development, Cardiff Software

***57 Productivity Gain Without Downsizing*** (Lecture)

Instructor: Dr. Ben Graham, Chairman, Ben Graham Corporation

***61 A Single Business Process for Paper and Electronic Forms*** (Lecture)

Instructor: Artur Vassilyev, Senior Project Manager, ABBYY USA

***End Users Panel*** (Panel discussion)

DaimlerChrysler Financial Services: Nancy Flor-Gawel

Interior Health: Sheila Bermiller

Premera Blue Cross: Bonnie Harper

Ameriprise Financial: Anjali Srivastava

Pennsylvania Department of Transportation (PennDOTT): Barry Williams

***Summary***

The well-rounded program was designed to reach every level of experience, beginner to expert and to provide new and exciting insights into business management and the constantly evolving fields of behavioural and information sciences. It was the perfect opportunity to meet colleagues in related professional fields from the U.S., Canada, and other parts of the world to share innovative ideas, get answers to individual problems and avoid potential problems by talking to people who have "been there, done that." I was most impressed by the common willingness to 'share' work, best practices, standards, policies, procedures, forms, problems, solutions and misery, some of it gained at great professional and personal expense. The general attitude is that we are all in 'it' together, and there is no sense in anyone starting from scratch when somebody has already paved the way, suffered the indignities and earned the scars. I came away with so much 'free' stuff that I am beholden to the group to return next year with my own freebies to hand out.

The DTHR was well represented by my attendance. I have brought back the complete proceedings of all sessions presented at Symposium to share with the rest of the Forms Management team. I am looking forward to attending the 2007 Symposium in St. Louis, Missouri.