Hello ARMA Members! I am honored to have been elected as the new ARMA Houston President for 2014-2015 chapter year.

Our goals are to always increase value to our membership and reach as many of our 425 members as possible. That is not an easy task as our membership spans the Greater Houston area.

There are many vehicles in which we provide education and networking opportunities to our membership. We have the ARMAdilla which is published six times a year. Educational opportunities include an annual seminar and an annual Spring Conference. We also have many networking opportunities from the monthly luncheons to the online blogs to the Golf tournament to the Holiday Social. My hope as your president is that you can attend at least one of these events to help enhance your membership with ARMA Houston.

This year’s theme is “IG: The Future Is Now!” As we expand the Records and Information Management realm of responsibilities, from electronic document management to managing IMs, text messages to social media, we plunge into a bigger arena...Information Governance. We need to embrace the evolution and understand that Records Management is just one part of the job duties that fall under our responsibilities. This years' program will cover each of “The Principles” outlined by ARMA International to provide more education on the many aspects under our responsibilities as Records Managers and Information Governance Professionals.

As with a new year, we have a new board of directors. Allow me to introduce the new board:

- President – Julie Prochnow
- Executive Vice President – Richard Waters
- Immediate Past President – Pamela Sankey
- Past President – D’Anderia Dunham
- Vice President Chapter Conference – Todd Brown
- Vice President Membership – Frank Lerma

This is a great opportunity to get involved and help lead our chapter into a successful new year.

Continued on the next page...
President’s Desk, cont’d from pg. 1…

• Vice President Chapter Meetings – Tad Howington, CRM, FAI
• Vice President Communications – Skai Shadow
• Vice President Education – Beverly Harris
• Vice President Community Outreach – Nancy Sparrow

The board of directors attends the Southwest Region Leadership Conference each year to improve our leadership skills, so we can enhance the chapter experience for our members. This year the conference was held on the Carnival Cruise line, Triumph. As we sailed the open sea, we attended two days of leadership training and lots of networking with our fellow board members and leaders from other regions. It was a great experience and I can’t wait for next year’s conference. If you are interested in becoming a leader in ARMA Houston, you can also attend the leadership conference to see if this is something you’d like to get involved with for next year.

We have many volunteer opportunities available on several of our committees. If you are interested in becoming a volunteer and maybe participating on the board of directors’, contact me or one of the board members previously mentioned.

I look forward to seeing you at the next ARMA Houston event. If you need anything, please don’t hesitate to contact me.

Julie Prochnow
ARMA Houston Chapter President 2014-2015

CRM Study Group Provides Lunch “Think Tank” for Professional Records Managers

By: Pamela Sankey
Previous President 2014-2015

Attending the ARMA Houston CRM Group luncheon Friday, June 6th lead by Ellie Myler, CRM, was not only educational, but entertaining. Ellie’s guest speaker, Jessica Harman with Phillips 66, gave an enlightening presentation about how and what to study for the ICRM certification test. Jess shared personal experiences that kept our attention as well as making us laugh and have fun too!

We learned about surprises one may encounter at the exam facility, tricky exam questions and which books are the best to read to prepare for the exams. We also learned that the ARMA International RIM Essentials online course will take you a long way toward preparing for the ICRM exams. This program consists of 10 online courses that focus on the best practices in today’s most important functional areas in RIM, such as managing electronic records, performing legally defensible e-discovery, developing a business continuity plan, reducing threats to privacy, and more. Visit the ARMA International website for more information about the RIM Essentials Online Course.

If you are interested in becoming a Certified Records Manager (CRM), consider attending the next CRM study group session. You will also want to join the ARMA Houston CRM Study & Networking Group on the ARMA Houston website. To join, visit www.armahouston.org, click on the “Membership” tab, then click on “Join a Group”. Select the CRM Study & Networking Group. Visit the ICRM Website to find out all the details about becoming a candidate, examination schedules and other information about becoming a CRM. The CRM is a “Certification” not a “Certificate” and the ICRM (Institute of Certified Records Managers) is the international certifying organization of and for professional records and information managers.

Many thanks to Ellie Myler, CRM for heading up this group for ARMA Houston. We are fortunate to have her as our ICRM Committee Manager. Ellie Myler is the Corporate Records Manager for CITGO Petroleum Corporation. She has been in the field for 25 years, has published articles and received the “2007 Britt Literary Award” from ARMA International. She is a Certified Records Manager, Certified Business Continuity Professional and holds a Change Management certification. Ellie has dedicated herself to helping others earn their ICRM certification since she became certified in 1996 through grading Part 6 and mentoring many candidates to attain their CRM certification.

Watch the ARMA Houston ARMAdilla Weekly for information about the next CRM Study & Networking group meeting. You will have the opportunity to share your experiences and concerns about studying for the exams, ask questions and learn from other attendees about the challenges of becoming a CRM. We will be happy to have you join us!

Julie Prochnow
ARMA Houston Chapter President 2014-2015

Return to Front Page.
ARMA Houston Congratulates Local Authors of New Records Management Publication

By: Tad Howington, CRM, FAI
VP Chapter Meetings

After several long years of planning, painstaking research, writing, revising and editing, Dr. Ann Bennick, CRM (retired) and Judy Sitton, CRM, welcomed the publication of their new book, *Managing Active Business Records*, on June 1, 2014 by ARMA International.

Soon to become a “go-to” reference book, this new addition to the ARMA International catalog explores records management concepts, principles, processes, and considerations for developing, implementing, and maintaining effective active file systems for paper- and electronic-based records.

Longtime members of ARMA Houston, Ann and Judy have distinguished themselves as thought leaders in the records and information management profession through their long careers in education, consulting and professional involvement as members of the Board of Regents of the Institute of Certified Records Managers (ICRM). In addition, Judy served as President of ARMA Houston during 2010-2011.

When asked her thoughts on seeing her first book in print, Judy graciously acknowledged her long friendship with and gratitude for her co-author. With a smile as wide as a child’s on Christmas morning, Judy said, “I was so honored when Ann approached me to co-author this book with her. Authoring a book has been a life-long goal for me. Ann was the perfect person to work with and guide me through the process. She was my records management instructor when I was new to the profession, encouraged me and served as a mentor when I sat for the CRM exam, and is a cherished friend. Who better to partner with to achieve this significant milestone in my career?”

The culmination of this long friendship and professional collaboration is this gem of a book. It is available for purchase in hardcopy or in PDF through the ARMA International Bookstore at www.arma.org.

In celebration of this milestone, ARMA Houston will be sponsoring a book signing on September 30th. Hosted by Kinder-Morgan, both Ann and Judy will be available to personally autograph purchased copies of their book and talk with attendees. Books may be purchased online or copies will be available for purchase at the event. Watch your mailbox for a formal invitation!!

Congratulations Ann and Judy!

Join the Information Management Professionals of ARMA Houston

One of ARMA’s strengths is its ability to bring together people with the common purpose of managing information in today’s world while protecting information of the past. Established in 1956, ARMA’s 10,000 plus members from 30 countries are from every level of the profession and every type of organization.

Like with anything, the more you give, the more you get. So, get involved with ARMA Houston! Join a committee. Come to lunches. Bring a friend or colleague to an event.

Membership information can be found at www.armahouston.org, click Membership.

Return to Front Page.
ARMA Houston Community Outreach & Fundraising  
2014 was great! 2015’s Going to be Better!!!

Hello, ARMA Houston members and ARMAdilla readers:  
You’ve probably read of last year’s successful Chapter community outreach projects in the most recent issue of the ARMAdilla. Thanks once again to all who contributed and participated!!

This year, we’ll see the return of the Golf Tournament. Committee co-managers Bryan Hedges and Jennifer Walker-Ostertag are working to make it as good as - better than! - previous toursneys. They’ve reserved Cypresswood Golf Club in Spring on Thursday, November 6, with a shotgun start at 8:30 am. Bryan and Jennifer can use some help. If interested, please contact them at Bryan.Hedges@recall.com and jwalker-ostertag@AltaMesa.com.

Holiday Social committee manager Ryan Zilm is making preparations for this year’s party and would like a volunteer to help with some of the details. It will take place on Thursday, December 4, from 7 ‘til 10 pm at Goode’s Armadillo Palace on Kirby. This is a fun committee, especially for those who like to shop, after all, what’s a Holiday Social without door prizes? You can reach Ryan at rzilm@newfield.com.

Also back is Highlighting Literacy for Kids. Attendees of the monthly chapter luncheon meetings likely notice the miniature records storage boxes on the tables. No doubt they notice people putting money into those boxes - and maybe they toss in some of their own cash. Those monies add up to about $1000 yearly, all of which is donated to Stevens Elementary School for the purchase of books and supplies. Gayle Page chairs this long-standing committee and welcomes committed volunteer mentors and readers. Contact her at gpage@pacotech.com.

ARMAdilla readers may have seen a summary of a records-centric news story or on-line discussion, or a notice of comment deadlines for proposed changes to legislation or regulations. Local Government Group members probably received blog and forum updates by email, too. It’s likely that those publications and postings were composed or contributed by the Legislative and Regulatory Affairs Committee managed this year by Michelle Manukonda. She can’t do it all alone, though, contact her at mmanukonda@sugarlandtx.gov to offer assistance.

New in 2015 is aniMeals on Wheels, a pet food service provided by Interfaith Ministries for Greater Houston (IM) to its senior meal recipients who have cats or dogs. IM began the program so that Meals on Wheels seniors would not feel compelled to share their limited food and resources with their four legged friends. Often these home-bound seniors live alone and their pets are their only companions. The project depends solely on donations of pet food and volunteer meal-delivery persons to help seniors keep their companion animals and save their pets from possibly sad ends.

ARMA Houston members and friends can help IM achieve its goal by donating canned or dry dog or cat food at chapter meetings and at the Holiday Social. Other needed items include accessories such as brushes, combs, collars and leashes, puppy pads and cat litter. Cash donations, deposited into a general fund and not specifically to aniMeals on Wheels, are also accepted. This is a great opportunity for your company to help an ARMA Houston designated charity by enlisting its employees to donate. Individual donors and their employer will receive not only appreciation and will be recognized in the Community Outreach and Fundraising VP’s end-of-fiscal-year recap.

Community Outreach & Fundraising VP Nancy Sparrow,  
Nancy.Sparrow@fortbendcountytx.gov
ARMA HOUSTON CHAPTER proudly announces the
11th Annual Fundraising Golf Tournament
Thursday, November 6, 2014 @ 8:30 AM
Register online at www.armahouston.org

$125 per person
$475 per team

Registration begins at 7:30 AM
Cypresswood Golf Club
21602 Cypresswood Drive
Spring, TX 77373

Tournament Includes:
Drawings, Gift Bag, Breakfast and Lunch, Trophies for top teams, Pitching, Putting, Longest Drive, Closest to the Pin, and Hole-In-One Contests!

All proceeds raised will benefit ARMA Houston Chapter’s Outreach Programs.
For more information please visit www.armahouston.org

Early Bird Registration ends October 17
Register today!

Sponsorship Opportunities are available.
For more information contact Bryan Hedges (832)453-2121.

Click here to register!

Return to Front Page.
**Q.** How can I convince people to “do the right thing” – specifically get them to create/update retention schedule or utilize their existing control schedule?

**A.** The tools at your disposal are basically the carrot and the stick – reward or reprimand. In my experience, which you choose to use is largely dependent on the culture of your organization. Sometimes a records manager will need to employ both.

**Rewards**

If you choose to go with the carrot, there are many forms of rewards available to you -- some requiring a budget line item -- others, extreme creativity.

For example: a pretty common practice is to set a specific time for a compliance task then entice people to show up by promising to serve food. It doesn’t seem to matter if it’s fancy gourmet or Betty Crocker brownies from a mix. You know what your budget will allow. Just be sure to have the tools available for them to complete the task and don’t let them leave before it’s done. This may be the best solution for those say they never have time to tackle the job.

I’ve also seen plaques, awards, trophies, and the like used effectively when tied to some time or quantity goal. For instance, have your control schedule updated by the end of September and receive tickets to a Skeeter’s ball game/gift card for a movie/name in the company newsletter. I’ve heard of some pretty outrageous rewards being offered.

In the case of the retention or control schedules, if you think fear of making a mistake may be what's causing the delay, face time with that stakeholder may be the only thing that helps. What is a common tool to most records managers can be very intimidating to the uninitiated. No matter what reward you offer, use this time to gain familiarity and recognition for your entire RIM program. You might as well get the most bang for your buck as possible.

**Reprimands**

On the other hand, if you decide to use the stick and make non-completion of any of your initiatives punishable, be absolutely sure you have support from above. Seek advice before declaring that a punishment will occur and definitely before you act to impose it.

However, recognize that there are certain instances where you may have no other recourse. The consequences to your employer can be significant – sanctions, loss of business, forfeiture of accreditation, denial of permits, or worse.

Hang in there. The question you asked has been on the lips of every records manager at one time or another in their career.

If you have a question for “Ask the CRM”, sent it to Courtney Stone at cstone@amocofcu.org.
What the NSA Can Teach Us about Finding Documents: 6 Tips on Metadata

By: David Lavenda
See the original article as published on cmswire.com (direct link to the article).

Six months ago, metadata was a word relegated to technology specialists. But since the recent NSA campaign, metadata has become part of the collective lexicon. It has appeared in headlines from the Guardian, USA Today, The New York Times, CNN and countless other media outlets.

CNN defines metadata narrowly as “information wireless carriers collect about where, when and to whom customers make phone calls. It doesn’t include any recordings of the actual phone call itself.” But we know that metadata means a lot more than that.

Metadata has become a dirty word from the recent scandal. But those of us in the collaboration world see metadata in a positive light. To collaboration specialists, metadata means simply “data about data” or more specifically, data that provides information about something. And that means metadata is important because it enables us to catalog information so we can find it later on. Precisely the reason the NSA was so interested in metadata in the first place. In fact, Stanford researchers who recently studied call records found that it was “trivially [easy] to figure out the identity of a caller” from metadata — metadata that was automatically generated by the phone companies, without the callers’ knowledge. Researchers were able to find out where people worked, where they lived and a host of personal behaviors just from their calling patterns.

Regardless of where you come down on the legality and ethics of the NSA program, the constructive takeaway from all this publicity is the awareness it has created around the importance of cataloging information so it can found and used later on. So take advantage of the awareness it has created around the importance of cataloging information so we can find it later on. Precisely the reason the NSA was so interested in metadata in the first place they go to find them.

Metadata to the Rescue

Metadata is the answer to this document “treasure hunt,” because judicious use of metadata can help us find information quickly. Just as the NSA discovered about our phone calls, we can learn a lot about documents without actually having to read them — which means we can find them quickly … if they are cataloged accurately. And isn’t that what we need for discovery, audits, governance and compliance?

Content management systems like SharePoint make it easy to associate metadata with documents. In fact, these systems automatically assign simple forms of document metadata, such as author, created date, last edited date, document size and version number.

But it’s the explicit forms of metadata that can provide the big value. These metadata types are typically manually assigned to documents. For example, metadata such as topic, project name, customer name, security classification and duration of a document’s lifespan can all be used to help catalog documents accurately so they can be found quickly later on.

When constructed properly, even a small number of metadata can make it easy to locate documents (as well as pictures, videos and webpages), even in enormously large digital archives. And that’s important, because these objects are becoming part of our daily work arsenal.

But how do you get people to properly define metadata so documents can be found later on? Here are some practical suggestions for making the most of metadata.

- **Automatically assign metadata values** — some systems allow you to automatically assign metadata values when you store a document in a specific location. Use this capability to reduce the classification workload.
- **Use required metadata** — make it mandatory for people to specify data before a document can be checked-in to your document management system.

Continued on the next page... Return to Front Page.
Define a simple set of metadata — whether you decide to implement a rigid taxonomy or a loose folksonomy, get all the necessary constituents to participate in the process. Resist scope creep and keep it simple. The more complex the set of data choices becomes, the less likely people will know what to do. Keep the number of metadata objects small. If someone has to specify more than two or three values for each document, they won't do it.

Educate the workforce about the business value — if employees understand the value of specifying metadata, they will be more likely to "play ball." If the project becomes perceived as just another IT initiative, workers will resist.

Train your people — what seems obvious to you won't be obvious to the multitude of workers who actually need to specify the metadata. Investing in training and support will go a long way to making the project a success.

Make it easy — invest in the user experience — if the process of defining metadata becomes a nine-step process, you can forget about getting people to comply, regardless of how important they perceive the task. Introduce tools that prompt users to specify required metadata before documents can be checked in. Use workflow tools that automate metadata definition steps. And make it easy for people to search using metadata — the faster they find documents, the higher the likelihood workers will spend the time to define metadata in the first place.

Metadata in the Mobile Enterprise

Finding information is hard enough when you are at your desk, but it has taken on a new dimension in the mobile enterprise. As workers untether from their desks and take their work on the road, people now need to find information from their iPads and smartphones — while they are at a customer site, at a conference, or while they are preparing a proposal in an airport lounge.

Mobile metadata can be especially helpful here. Because while finding information is important everywhere, it can be especially essential in work-critical situations on the road. It's nice to know that your mobile device can actually help you find information — through technology built into mobile devices can be used to automatically classify information, and hence find it later on. Stay tuned for more on this in my next post.

ALICE L. HALTOM EDUCATIONAL FUND
CHILI COOK-OFF

ALHEF will be serving up Chili in 2015
February 21, 2015
Alternate Inclement Weather Date
Sunday, February 22, 2015
Location: Image Engine 7170 West 43rd Street, Houston Texas
For team Entry or Sponsorship Information Contact:
Gayle Page, 713-688-0404, gpage@pacotech.com or
Frank Lerma, 832-337-0255, frank.lerma@shell.com

Return to Front Page.
ALHEF Award Recipients 2014

By: Shirley Anderson

The Alice L. Haltom Educational Fund exists for the purpose of furthering education in the field of information and records management. It is supported by contributions from various chapters of the Association of Records Managers and Administrators (ARMA), companies, individuals, and other organizations.

The Houston ARMA Chapter created the Fund in 1985 to honor Alice L. Haltom, CRM, at her retirement for her untiring efforts to improve the profession of information and records management during her career that spanned more than three decades.

Students applying for the ALHEF Scholarships were required to complete the application form and provide three letters of recommendation from employers, instructors, or other qualified individuals who could attest to the applicant’s character. A copy of the most current official school transcript and degree plan was also evaluated.

The Board of Trustees for The Alice L. Haltom Educational Fund awarded $32,000 in scholarships to sixteen individuals. The scholarship winners were notified in July.

For more information on ALHEF, how you can help, or how to apply for a scholarship, please visit the ALHEF web site at http://www.alhef.org

Joshua Cade
University of North Texas

Joanna Chen
University of California

Caitlin Crane
University of Illinois at Urbana Champaign

Taylor Demons
Baylor University

Samuel Dodson
The University of British Columbia

Emma Florio
Simmons College

Cassandra Janakos
Stanford University

Molly Kuhn
University of Illinois

Venice Lambrardo
University College Dublin

Ingrid Lecot
Baylor University

Chira Navarrete
University of Arizona

Neel Shah
Northeastern University

Rochelle Smolinski
University of Michigan

Shelby Stuart
University of Michigan

Amy Sutherland
Dalhousie University

Jennifer Weiser
San Jose State University

Thanks to all the “Friends of Alice” 2013-2014

By: Shirley Anderson

In July 2014, ALHEF awarded $32,000 in scholarships to sixteen students. These scholarships were made possible as a result of the generous contributions received from our sponsors during the year. ALHEF Trustees want to recognize our sponsors and extend our gratitude for your support.

If you would like to enhance the scholarship fund, your tax deductible contribution can be mailed to ALHEF at P. O. Box 70530, Houston, TX 77270. Checks should be made out to ALHEF. Your continued support will be appreciated.

The ALHEF Trustees would like to thank all of our 2013-2014 “Friends of Alice”!

Friend $25 - $50
Skip Cain
File Trail Inc.
Kari Geerdes
Michelle Lopez
Colleen Renfro

Benefactor $50 - $100
Brenda Clements
Doculabs
Sandy Miller
Gayle Page
Theatre Suburbia
PacoTech, Inc.

Sponsor $100 - $250
Linda & Richard Trimm
Shirley Anderson
Anonymous
DCR
Allan Heath
KeyStaff, Inc.
Frank Lerma
Pam Sankey
Judy Sitton
Solvay America, Inc.
Janice Taylor

Associate $250 - $500
Debra and Louis Buzby
Mica Hanchev/Document Management Group
INI
Pioneer Records & Information Management
George and Nancy Ramirez
Recall Corporation
Bruce and Denise Robertson
Doug Rollo
Nancy Sparrow

Patron $500 and UP
Access Sciences, Corporation
ARMA Houston
Tad Howington
Image Engine
Teresa Matlock
Beverly and Kimball
McMahen
Montana & Associate

Return to Front Page.
Member Spotlight:

25 things about Delores Barlow

1) I was born and raised in Plainfield, New Jersey.
2) I relocated to Houston, Texas 7 years ago, just me and my dog.
3) I am 1,615 miles, 23 hours and 17 minutes away from my closest relative.
4) I have been in the Transportation and Records Management arena over 25 years.
5) I am an accomplished line dancer.
6) I have an identical twin sister.
7) I have 16 brothers and sisters all by the same parents.
8) I broke both of my arms and dislocated my shoulder in a bike accident two years ago.
9) I take pleasure in talking and visiting the elderly.
10) I am a disciple for "CHRIST JESUS".
11) I have experienced an emotional journey to East Africa and South Africa.
12) I have observed the greatest animal migration across the Serengeti from Tanzania.
13) I have a BIG 9 yr. old German Shepard named “Bishop” he presides over our house in Pearland, Texas. He is smarter than a 5th grader.
14) I am proficient with computers and databases.
15) I have been to the North Pole in Alaska and met Santa and Mrs. Claus.
16) My first job was making stuffed animals.
17) I love to sing and not only in the shower.
18) I never been to a winery, but would like to go.
19) One of my jobs earlier in my career was a volunteer juvenile probation officer.
20) Riding a horse is on my bucket list.
21) I dance like no one is watching.
22) I ride my bike 20+ miles once or twice a week.
23) I am a CRM candidate.
24) My passion is interior and exterior decorating.
25) I never want to shovel snow AGAIN.

If you want to be in the next Member Spotlight
Email cstone@amocofcu.org

Return to Front Page.
The ARMAdilla is the official newsletter of the Houston Chapter of ARMA International.

ARMA Houston, P.O. Box 1391, Houston, Texas 77251

Editor: Courtney Stone- cstone@amocofcu.org

Special thanks to this edition’s contributing authors. We are looking for quality content to share with our members. If you would like to write for the ARMAdilla, please contact the editor.