



ARMA INTERNATIONAL
**EDUCATIONAL
FOUNDATION**
RESEARCH · EDUCATION · SCHOLARSHIP

2008 Annual Report

***Our mission is to generate and provide resources
for research, education and scholarships to
continually advance our profession.***

**The ARMA International Educational Foundation is incorporated under
Section 501(c)(3) of the U.S. Internal Revenue Code as a non-profit,
tax-exempt, research/education foundation.**

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DEDICATION

The 2008 annual report of the ARMA International Educational Foundation is dedicated to the memory of Gary Lewis, CRM, who left us suddenly and much too soon.

At the time of his death, he was actively engaged in the advancement of the Foundation and poised to become the next Chairman of the Board of Trustees. The Foundation benefited from his administrative innovations, his aggressive attention to marketing and quality reporting, and his unflinching commitment to the goals and continued growth of the Foundation.

FOUNDATION VISION AND MISSION

VISION

The ARMA International Educational Foundation is your investment in the future of records and information management.

MISSION

Our mission is to generate and provide resources for research, education and scholarships to continually advance our profession.

STRATEGIC GOALS

The Foundation concentrates its funding and promotional activities in four areas:

- Encourages every RIM professional and partner to become a financial supporter.
- Supports research to address critical issues in information management.
- Provides grants and scholarships to enhance knowledge, skills and abilities of practitioners in the field.
- Fosters educational initiatives that develop information management skills and programs.

FROM YOUR FOUNDATION CHAIRMAN

Susan Whitmire, CRM, Foundation Chairman

The Foundation has continued to mature and develop over the past several years clearly demonstrating significant results to its donors and beneficiaries. Three scholarships were awarded with the help of the Canadian Region in 2008. Additionally, a new scholarship, named in honor of Mavis Eppes, was established and funded for award in 2009. Our researchers and scholarship recipients continue to provide important information to the RIM community through their research and conference presentations.

On behalf of the Board of Trustees I would like to thank you for your continued support and financial contributions to this very important facet of our profession. We are looking forward to providing more scholarships and quality research in 2009.

YOUR 2008 FOUNDATION BOARD OF TRUSTEES



Susan B. Whitmire,
CRM
Chairman



Gary Lewis,
CRM, CDIA+
Vice-Chairman/
Secretary



William W. LeFevre,
CRM, CA
Interim Vice-Chair-
man/Secretary



Philip Albert
Treasurer



Sharon Alexander-
Gooding, MAS



James Booth, CAE



Gary Bullard



Pamela Duane, CRM



H. Larry Eiring,
CRM, FAI



Irene Gelyk, CRM



Pilar C. McAdam, CRM



Juanita M. Skillman,
CRM, FAI



Preston W. Shimer, FAI
Foundation
Administrator

YOUR FOUNDATION ACCOMPLISHMENTS

Since its inception, your ARMA International Educational Foundation has:

- Built an Endowment of over \$400,000
- Published eleven significant Research Publications, including two reports out this year
- In progress is our first collaborative project with the Fellows of ARMA International: identifying the core works of the RIM Profession.
- Research projects are under contract for delivery in 2010 and 2011.
- Provided two content sessions at the last five ARMA Annual Conferences, highlighting the new research projects.
- Developed our Strategic Plan with an objective-focused 5-year Financial and Business Plan with annual updates
- Promoted the 5/100 Program to involve ARMA members in growing the Endowment Fund.
- Structured and developed the Chapter Foundation Champion Program to improve chapter level participation.
- Distributed a Foundation Newsletter each quarter to contributors.
- Provided Scholarships to eight deserving students pursuing higher education in records and information management.
- Connected the Foundation with Chapter Leaders at each of the ARMA Regional Leadership Meetings.
- Developed and implemented a solid, comprehensive Marketing Plan.

- Generated more than \$100,000 in pledges, essential to Foundation growth, during the first year of the Planned Giving Program.
- Published Annual Reports of the Foundation.
- Rebranded the Foundation Logo and tagline.
- Revised the Foundation website.
- Raised funds for sending high quality reference books to the records management library at the University of Tanzania.
- Enhanced our abilities to communicate electronically with our donors.
- Participated as an exhibitor in the annual conferences of PRISM and the Canadian Region of ARMA International.
- Enhanced our relationship with ARMA International through a Memorandum of Understanding.
- Provided a \$2,500 research grant to David Mukembo to help fund his Master's research project at the Makerere University School of Library and Information Science (due to the extra effort of Trustee, Juanita Skillman).
- Expanded the reach of the Foundation through an accord with the International Records Management Trust (IRMT) for funding educational initiatives in developing countries.

SALUTING OUR 2008 CHAPTER FOUNDATION CHAMPIONS

Pilar McAdam, CFC Chair

The Chapter Foundation Champions (CFCs) continue to be our conduit to and from individual ARMA chapters and members. CFCs are the ones to whom we direct action requests, asking for help with soliciting donations, selling raffle tickets, and keeping the Foundation and its goals in view and on the table when chapters plan and implement their strategic goals. There are currently 88 CFCs, and without their steadfast support, we'd be unable to accomplish as much as we have. The Foundation salutes the dedication of the 2008 Chapter Foundation Champions listed below.

Canadian Region

Calgary Chapter
Hirsche, Pat

Canadian Region

Edmonton Chapter
Ng, Karen

Canadian Region

Edmonton Chapter
Shane, Maggie

Canadian Region

Montreal Chapter
Desrosiers, Alain

Canadian Region

Toronto Chapter
Gelyk, Irene E

Canadian Region

Vancouver Chapter
Bradley, Alexandra

Canadian Region

Vancouver Chapter
Bradshaw, Dierdre

Canadian Region

Winnipeg Chapter
Weinholdt, Richard

Great Lakes Region

Central Illinois Chapter
De Laurentis, Nicholas

Great Lakes Region

Chicago Chapter
Lockett, Steven

Great Lakes Region

Detroit Chapter
Imhof, Kenneth

Great Lakes Region

Frankfort-Bluegrass Chapter
Myers, Mark

Great Lakes Region

Greater Cincinnati Chapter
Jacobs, Robin

Great Lakes Region

Greater Cleveland Chapter
Gulich, Komal

Great Lakes Region

Greater Dayton Chapter
Wydman, Chris

Great Lakes Region

Greater Indianapolis Chapter
Jend, Gene

Great Lakes Region

Louisville Chapter
Goss, Kathy

Great Lakes Region

Madison Chapter
Hughes, Timothy

Great Lakes Region

Mid-Michigan Chapter
Gee, Julie

Great Lakes Region

Milwaukee Chapter
Larsen, Dennis

Great Lakes Region

Western Michigan Chapter
George, Greg

Great Lakes Region

Detroit Chapter
LeFevre, William

Great Lakes Region

Greater Columbus
OH Chapter
Brumm, Eugenia

Great Northwest Region

Boise Valley Chapter
Terrall, Tommy

Great Northwest Region

Columbia Basin Chapter
Ramirez, Elena

Great Northwest Region

Greater Anchorage Chapter
Skowen, Jeff

Great Northwest Region

Greater Seattle Chapter
Koga, Dean

Great Northwest Region

Puget Sound Chapter
Werelius, Barbara

Great Northwest Region

Bellevue/Eastside Chapter
Blaylock, Fran

Mid-Atlantic Region

Pittsburgh Chapter
Shimer, Preston W

Mid-Atlantic Region

Pittsburgh Chapter
Snyder, Ruth

Mid-Atlantic Region

Richmond Chapter
Noble, Pat

Midwest/Rocky Mountain Region

Big Sky Chapter
Hollar, Rhett

Midwest/**Rocky Mountain Region**

Central Iowa Chapter
Lees, Susan

Midwest/**Rocky Mountain Region**

Central Missouri Chapter
Kelso, Graig

Midwest/**Rocky Mountain Region**

Greater Kansas City Chapter
Knowles, Todd B

Midwest/**Rocky Mountain Region**

Mile High Denver Chapter
Taggart, Mollie

Midwest/**Rocky Mountain Region**

Nebraska Chapter
Petersen, Jerry

Midwest/**Rocky Mountain Region**

North Dakota-Bismarck/
Mandan Chapter
Bossert, Les

Midwest/**Rocky Mountain Region**

Northern Colorado Chapter
Lucero, Vicki

Midwest/**Rocky Mountain Region**

St. Louis Chapter
Newcomer, Audrey

Midwest/**Rocky Mountain Region**

Utah-Salt Lake Chapter
McFerson, Pat

Midwest/**Rocky Mountain Region**

Wyoming Chapter
Crock, Donna

Northeast Region

Boston Chapter
Kenney, Kimberly A

Northeast Region

Central New York Chapter
Anderson, Lorraine

Northeast Region

Connecticut Chapter
Castora, Anita

Northeast Region

Connecticut Chapter
Jansak, Ray

Northeast Region

Connecticut Chapter
Trefethen-LeMay, Cynthia

Northeast Region

Metropolitan
New York City Chapter
Dederer, Melissa

Pacific Region

Central California-
Bakersfield Chapter
Ozaeta, Eleanor

Pacific Region

Central Coast Chapter
Diaz, Noel

Pacific Region

Central Coast Chapter
Lago, Starla

Pacific Region

Central Coast Chapter
Moriki, Brian

Pacific Region

Golden Gate Chapter
Anderson, Mark

Pacific Region

Golden Gate Chapter
Medina, Larry

Pacific Region

Greater Los Angeles Chapter
Cusick, Mary

Pacific Region

Greater Los Angeles Chapter
McAdam, Pilar

Pacific Region

Greater Sacramento Chapter
Brabec, Chuck

Pacific Region

Hawaii Chapter
Siu, Keith

Pacific Region

Mt. Diablo Chapter
Denton, Karen

- Pacific Region**
Northern
New Mexico Chapter
Walden, Fred
- Pacific Region**
Orange County Chapter
Skillman, Juanita
- Pacific Region**
San Diego Chapter
Benay, Berl
- Pacific Region**
Silicon Valley/Santa Clara
Chapter
Goode, Michael
- Pacific Region**
Southern California Inland
Empire Chapter
Gray, Steve
- Pacific Region**
Utah-Salt Lake Chapter
Fleming, David M
- Pacific Region**
Utah-Salt Lake Chapter
Fujikawa, Marcie
- Pacific Region**
Young, Gari
- Southeast Region**
Greater Chattanooga Chapter
Whitmire, Susan B
- Southeast Region**
Jacksonville Chapter
Lazuk, John
- Southeast Region**
Knoxville/
East Tennessee Chapter
Phillips, John
- Southwest Region**
Arizona Chapter
Fox, Doreen
- Southwest Region**
Austin Chapter
Howington, Tad
- Southwest Region**
Baton Rouge/
Lafayette Chapter
Fager, Carrie
- Southwest Region**
Dallas Chapter
Brooks, Jociel
- Southwest Region**
Dallas Chapter
Phillips, Linda
- Southwest Region**
Dallas Chapter
Robinson, Debra
- Southwest Region**
Fort Worth Chapter
Moten, Stella
- Southwest Region**
Houston Chapter
Alston, Rob
- Southwest Region**
Houston Chapter
Heppler-Balkum, Denise
- Southwest Region**
Houston Chapter
Peden, John
- Southwest Region**
Houston Chapter
White-Dollmann, Mary
- Southwest Region**
Longview/
ARK-LA-TEX Chapter
Wood, Glenda
- Southwest Region**
Midland/
Permian Basin Chapter
Mayes, Cynthia
- Southwest Region**
Oklahoma City Chapter
Brouillette, Deanna
- Southwest Region**
South Texas-
Corpus Christi Chapter
Eyhorn, Diana
- Southwest Region**
Litt, Skip

FRIENDS OF THE FOUNDATION

The Foundation greatly values our *Friends of the Foundation*, organizations who generously donate and contribute to the Foundation. Many of our Friends have partnered with us on research projects.

ARMA International. Thank you to the leadership and members of ARMA International for their sustained financial support of the Foundation over many years, and their annual donations to the endowment.

Thank you to the following organizations for their financial support in 2008:

Metropolitan New York City Chapter
\$5,000 for research project

Mile High Denver Chapter
\$500 grant for research

Juanita Skillman
\$2,500 for David Mukembo's Masters Degree Research Project

Toronto Chapter
\$1,000 grant for IRMT joint project

Why Should I Donate to My Foundation?

Programs funded by your Foundation will help to secure the future health and stability of our profession. Through the endowment, donated monies will remain intact with only the interest earned by the endowment's investments used to fund programs. Your donation is a permanent income resource—it's the gift that keeps on giving. Supporting your Foundation is a way to give something back to your profession while leaving a significant legacy for those who come after us. It is a long-term investment in yourself and your profession's future.

How Can I Donate to My Foundation?

5/100 Pledges - You can pledge \$100 a year towards building your Foundation Endowment. Pledge payments can be made to the Foundation over a five-year period, payable on an annual, semiannual or quarterly basis using a number of payment options, including scheduled payments by credit card. Arrangements specific to your pledge are made confidentially with the Foundation Administrator. Pledge forms can be found on your Foundation website (www.armaedfoundation.org) or by contacting your Chapter Foundation Champion (CFC).

Planned Giving – Remember the Foundation in your estate. You have the opportunity to leave a lasting legacy towards ensuring our profession's future through pledging a planned gift to the Foundation's endowment.

One-Time Donations – You can also make a single, one-time donation to the Foundation in any amount from \$1.00 to whatever amount you choose. Every donation helps build the endowment!

Special Gifts, Memorials, and Honoraria –

- Individuals and organizations contribute to the Endowment Fund from time to time in order to honor special achievements, services provided to the profession and other contributions of note.
- Speakers who provide seminar and educational services may designate that the standard speaking fee be contributed to the Foundation instead.
- A memorial is a monetary gift offered in memory of an individual who is no longer with us but whose life made an impact, a difference, in the field of records and information management. Memorial gifts can be made by friends, relatives, co-workers, chapters or regions to recognize the work and contributions of such an individual.

Financial investments and contributions from individuals, companies and foundations are fully tax-deductible as provided by U.S. law. Canadian ARMA members can obtain a tax deduction against U.S. earned income only.

FOUNDATION MEMORIAL DONATIONS

A memorial is a monetary gift offered in memory of an individual who is no longer with us but whose life made an impact, a difference, in the field of records and information management. Memorial gifts can be made by friends, relatives, co-workers, chapters or regions to recognize the work and contributions of such an individual. Those honored by memorial gifts are listed in a special section on the Foundation web site. We recognize these memorial donations below:

In Memory Of:

Barbara Rike:

H. Lawrence Eiring
Susan B. Whitmire
Judy Tyler
Christ Metzger
Greater Seattle Chapter

Caryl Masyr Smith:

Metropolitan New York City Chapter

Gary Lewis:

H. Lawrence Eiring
Pat Vice
Christina Ayiotis
Pilar McAdam
Susan B. Whitmire
Institute of Certified Records
Managers
Gaithersburg, MD Chapter
Preston W. Shimer
Deborah Marshall
William LeFevre

Gloria Bordenuk:

Southwestern Ontario Chapter

Richard Skillman:

Lauren Greenwade
Orange County Chapter
Timothy Hughes
William LeFevre

Rita Holt:

Deborah Marshall

Thomas Hesse:

Tidewater Chapter

Tom Wilds:

Metropolitan New York City Chapter
Connecticut Chapter

William Ptacek:

Susan B. Whitmire
H. Lawrence Eiring
Stephanie McCutcheon
Scott Swanson
Sharon St. Peter
Katherine Walter
Tony Adams
Twin Cities Chapter

If we inadvertently failed to list your special gift or honorarium, please advise the Foundation Administrator via email to: Admin@ArmaEdFoundation.org

FOUNDATION PLANNED GIFT DONORS

H. Larry Eiring, CRM, FAI, Planning Giving Chair

Your Foundation Share Your Legacy campaign gives you the opportunity to leave a lasting legacy towards ensuring our profession's future through pledging a planned gift to the Foundation's endowment.

Making a planned gift to the Foundation can be accomplished through designation of the Foundation in your will or trust, declaring the Foundation as a beneficiary of your life insurance or other life policy or by designating a tangible estate asset to the Foundation. The planned giving process is easy to do and creates many benefits which not only help build an endowment for the future of our profession, but can help you as well. For example,

- A planned gift can assist you in your total estate planning;
- It may provide a lower tax for your heirs;
- Planned gifts often reduce your estate's capital gains and other inheritance taxes;
- And, most importantly, a planned gift will allow you to make a personal and lasting legacy for the future of records and information management.

Your gift – the legacy you will leave – will be directed to help educate and grow the next generation of records professionals.

Your Foundation salutes the following members of the Foundation's Legacy Society and are helping our profession and the Foundation build a solid future for research, education and scholarship in records management by designating a planned gift to the Foundation.

H. Lawrence Eiring, CRM, FAI
William LeFevre, CRM
Deborah J. Marshall, CRM
Pilar McAdam, CRM
Preston W. Shimer, CRM, FAI
Juanita Skillman, CRM, FAI
David Stephens, CRM, FAI
Pat Vice, CRM, FAI

FOUNDATION SPECIAL GIFTS AND HONORARIUM DONATIONS

Special Gifts and Honorarium are monetary gifts made to recognize past, current and ongoing work and contributions of a living individual. These gifts may be awards, scholarships or one time gifts that pay tribute to the activities of someone building the legacy of records and information management. Friends, relatives, co-workers, chapters or regions can make gifts in honor of someone they feel deserves recognition. Your Foundation thanks these contributors and acknowledges the following individuals recognized by the donor organization.

Honorariums

Cheryl Sullivan

Doug Elrick

Isabel "Elly" Bracamontes

Jeff Glover

Jesse Wilkins, CRM

Jim Booth

John Isaza, Esq.

Julie Gable

Julie J. Colgan

Leslie Malek

Linda J. Davis

Nancy Beauchemin

Pam Duane

Paul Bergee

Scott Hagen

Sheri Nystedt, CRM

Steward Scher

Susan Hubbard

Tim Hughes

Tim Hunt

Tom Faust

If we inadvertently failed to list your special gift or honorarium, please advise the Foundation Administrator via email to: Admin@ArmaEdFoundation.org

2008 FOUNDATION SILENT AUCTION

Susan B. Whitmire, CRM, Foundation Chairman

The ARMA International Education Foundation conducts a Silent Auction at the ARMA Conference each year to raise money for and create awareness of the Foundation. This event is sponsored by the Foundation, managed by the Foundation designated Silent Auction Chair, and supported by ARMA International, vendors, regions, chapters and individuals. The 2008 Silent Auction in Las Vegas raised \$9,155.

The variety and selection of donated items makes this a truly unique event each year. Bidding can be quite competitive on selected items. The success is attributed to all the donors and their creativity and to ARMA International's expo staff that make it all happen.

Las Vegas Silent Auction

Phil Albert
Muriel Albert
Sunny Bolander
Irene Gylek
Gary Bullard
Darcy Gateman
Susan Whitmire
Larry Eiring
Pilar McAdam
Deb Marshall



If we inadvertently failed to list your name, please advise the Foundation Administrator via email to: Admin@ArmaEdFoundation.org

2008 FOUNDATION SPONSORED RESEARCH PROJECTS

Juanita Skillman, CRM, FAI, Foundation Research Committee Chair

ARMA International and its research arm, the ARMA International Educational Foundation, are committed to research in the field of Records and Information Management (RIM) for the advancement of the RIM professional, the practice of Records Management, and for the promotion of the profession. The Foundation strives to provide research that adds fundamental knowledge that is unique to the RIM profession, aids in maximizing the value of Records and Information Management, and makes a positive contribution to the global perception of the RIM profession.

Research Projects for 2008 – 2009 fiscal year
(presented at Las Vegas Conference):

Big Buckets or Big Ideas? – Classification vs. Innovation on the Enterprise 2.0 Desktop

Dr. Patricia Galloway – University of Texas

Requirements for Personal Information Protection,
Part I – US Federal

Virginia Jones, CRM, FAI

Research Projects under contract for 2009 – 2010 fiscal year
(to be presented in Orlando):

Requirements for Personal Information Protection,
Part II – US States

Virginia Jones, CRM, FAI

International Records Management Trust (IRMT)
Electronic Records Management Project
Anne Thurston

Research Projects planned for 2010 – 2011 fiscal year
(to be presented in San Francisco)

Social Networks' Impact on Records and Information Management
Helen Streck

Absorptive Capacity and Records Management:
Exploring the Relationship
David Gaynon and John Stoner

Proposals for future Research Project are welcomed by the Research Committee at any time. Potential projects are scheduled three years out, for presentation at future ARMA conferences.

2008 FOUNDATION SPONSORED SCHOLARSHIPS

William LeFevre, CRM, Scholarship Committee Chair



Charis Wilson, CRM is the current Records Manager and Freedom of Information Act (FOIA) Officer at the National Park Service's Denver Service Center. In 1997 Charis earned her Masters in Library Science from Emporia State University where she is currently working towards her Ph.D.



Donald Johnson has undergraduate degrees in Computer Science, Linguistics, and Fine Arts. He is both a professional software engineer and an architect. In addition he is an amateur linguist and a practicing artist. This varied education and experience led Donald to undertake graduate education in Archival Studies and Records Management. He is most interested in researching 'how we learn, remember, use what we learn, how we find information and why we forget". Donald is pursuing a Masters of Archival Studies at the University of British Columbia. The Canadian Region of ARMA International provided funds for this scholarship.



David Mukembo is our first scholarship winner from Africa. David was one of the original LINC (Linking International Communities) members in the ARMA International program. The Orange County Chapter has been David's LINC partner for five years. David is enrolled in the Masters Program at Makerere University in Kampala, Uganda. As one of only two professional RIM practitioners in Uganda, he is leading the development of the professional in his country through example and education. He developed and teaches the only RIM training available in Uganda.

Copies of the results of these sponsored research projects are posted to the Foundation's website and can be downloaded free of charge.

FOUNDATION OUTREACH

Irene Gelyk, CRM

The Foundation signed an Accord of Partnership and Cooperation with the International Records Management Trust (IRMT). Our two organizations share common goals regarding the advancement of education, research and scholarship in the management, control and administration of records, throughout the world. Major contributors to this Accord were Susan Whitmire and Juanita Skillman of the Foundation and Anne Thurston of the IRMT.

The AIEF provided a grant of \$5,000 to assist with the distribution of educational modules, developed by the IRMT, that focus on managing electronic records for records professionals in developing nations in Africa and elsewhere.

The ARMA Toronto Chapter made a significant contribution towards this initiative and put forth a challenge to other Canadian ARMA chapters to match or exceed this contribution. Additional funds raised will be applied towards providing Records & Information Management textbooks to African Countries that have recently started pre and post graduate RIM programs.

FOUNDATION 2008/2009 FINANCES

Phil Albert, Sr., Foundation Treasurer

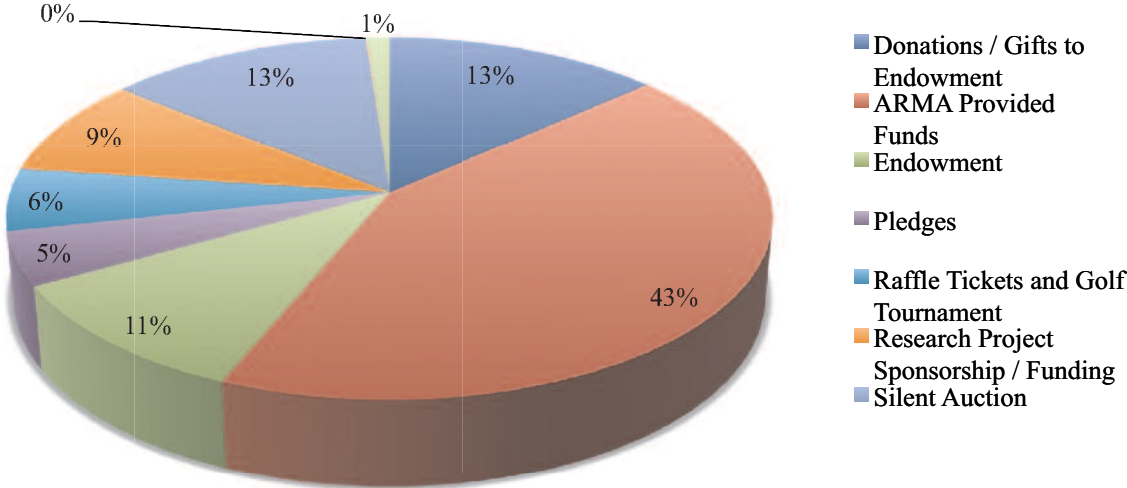
**Where Does Your Pledge, Memorial, or
Endowment Contribution Go?**

**100% of your Pledges, Memorials, or
Endowment Contributions go directly to
the Foundation's Endowment Fund!**

FOUNDATION SOURCES OF INCOME - 2008/2009

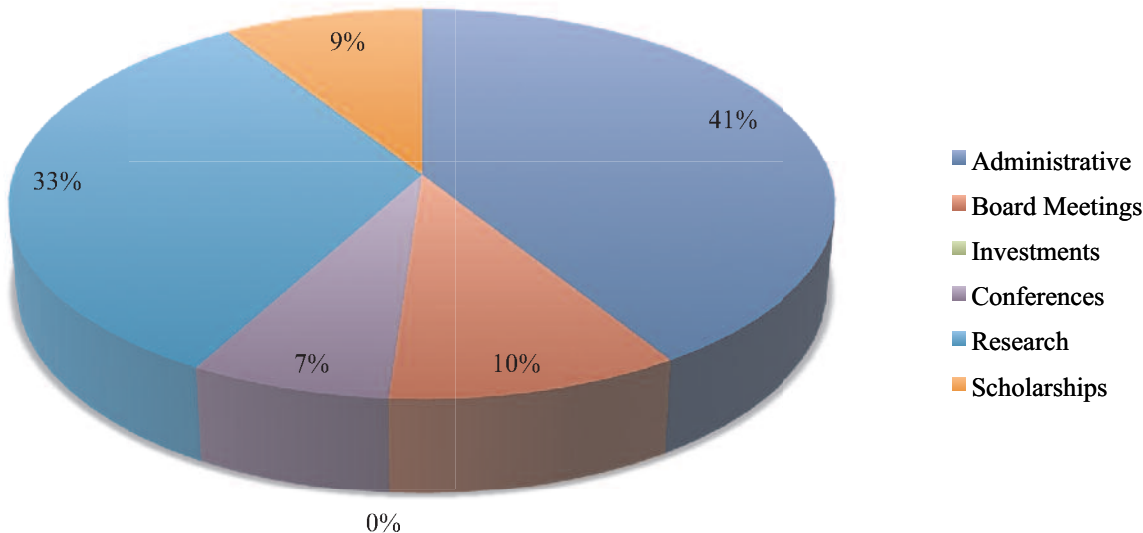
**ARMA International Educational Foundation
Sources of Income (Period Ending June 30, 2009)**

FOUNDATION SOURCES OF INCOME - 2008/2009

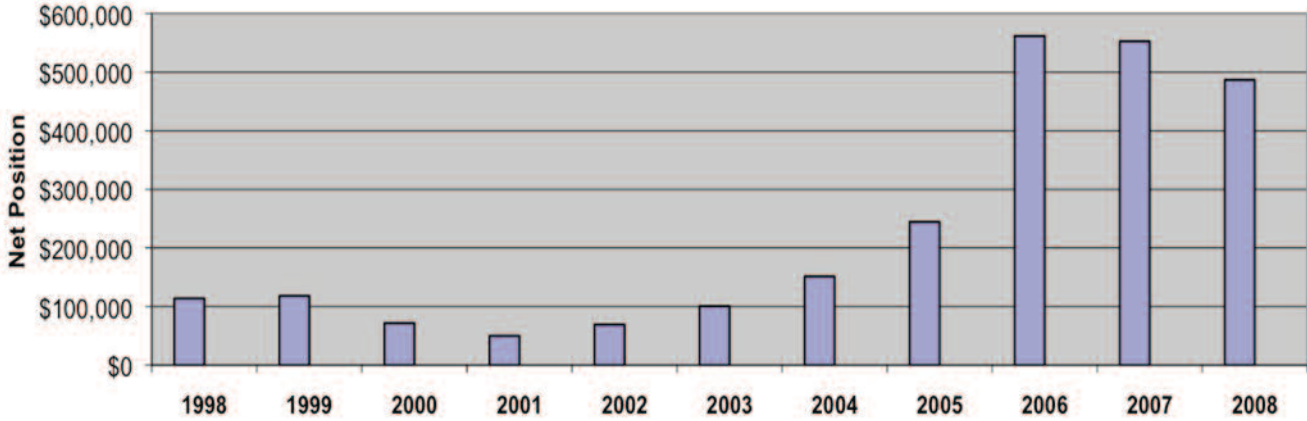


FOUNDATION EXPENSES- 2008/2009

**ARMA International Educational Foundation
Breakdown of Expenses (Period Ending June 30, 2009)**



GROWTH OF YOUR FOUNDATION NET POSITION



ABOUT YOUR FOUNDATION

For all written correspondence (including potential research projects and scholarship information) and financial transactions, please contact your Foundation at the Administrative Office:

ARMA International Educational Foundation
1609 Terrie Drive
Pittsburgh PA 15241
USA

For information about your Foundation on the Internet:
www.armaedfoundation.org

For electronic comments, questions or suggestions about the Foundation:
Admin@ArmaEdFoundation.org

For information about our parent organization, ARMA International, on the Internet: www.arma.org

For comments, questions or suggestions about this Annual Report or questions on your Foundation's financial reports, please contact:
Admin@ArmaEdFoundation.org