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.
TABLE OF CONTENTS

Foundation Vision and Mission ........................................................ 3
Chairman’s Message ...................................................................... 4
Board of Trustees .......................................................................... 5
Foundation Accomplishments Since Inception .................................. 6
Chapter Foundation Champions ...................................................... 8
Friends of the Foundation ............................................................ 11
Foundation Memorial Donations .................................................... 13
Foundation Planned Gift Donors .................................................... 14
Foundation Special Gifts and Honorarium ...................................... 15
2008 Silent Auction .................................................................... 16
Research Projects ...................................................................... 17
Graduate-Level Scholarships ........................................................ 19
Foundation Outreach .................................................................. 20
2008/2009 Foundation Finances .................................................... 21
About Your Foundation ............................................................... 24

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 unflagging 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-Chairman/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.
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

Edmonton Chapter
Ng, Karen

Edmonton Chapter
Shane, Maggie

Montreal Chapter
Desrosiers, Alain

Toronto Chapter
Gelyk, Irene E

Vancouver Chapter
Bradley, Alexandra

Vancouver Chapter
Bradshaw, Dierdre

Winnipeg Chapter
Weinholdt, Richard

Great Lakes Region
Central Illinois Chapter
De Laurentis, Nicholas

Chicago Chapter
Lockett, Steven

Detroit Chapter
Imhof, Kenneth

Frankfort-Bluegrass Chapter
Myers, Mark

Greater Cincinnati Chapter
Jacobs, Robin

Greater Cleveland Chapter
Gulich, Komal

Greater Dayton Chapter
Wydman, Chris

Greater Indianapolis Chapter
Jend, Gene

Great Lakes Region
Louisville Chapter
Goss, Kathy

Madison Chapter
Hughes, Timothy

Mid-Michigan Chapter
Gee, Julie

Milwaukee Chapter
Larsen, Dennis

Western Michigan Chapter
George, Greg

Detroit Chapter
LeFevre, William

Greater Columbus
OH Chapter
Brumm, Eugenia

Boise Valley Chapter
Terrall, Tommy

Great Northwest Region
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
Central Coast Chapter
Diederer, 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
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
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.

- 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.
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!
ARMA International Educational Foundation
Sources of Income (Period Ending June 30, 2009)

**FOUNDATION SOURCES OF INCOME - 2008/2009**

- Donations / Gifts to Endowment: 13%
- ARMA Provided Funds: 11%
- Endowment Pledges: 9%
- Raffle Tickets and Golf Tournament: 7%
- Research Project Sponsorship / Funding: 5%
- Silent Auction: 3%

**FOUNDATION EXPENSES - 2008/2009**

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

- Administrative: 41%
- Board Meetings: 33%
- Investments: 7%
- Conferences: 10%
- Research: 10%
- Scholarships: 7%
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