



ARMA INTERNATIONAL
**EDUCATIONAL
FOUNDATION**

RESEARCH · EDUCATION · SCHOLARSHIP

2009 Annual Report

Making a positive impact on our global community through support of research, education and scholarship in records and information management.

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.

FOUNDATION VISION, MISSION AND OBJECTIVES

VISION

Making a positive impact on our global community through support of research, education and scholarship in records and information management.

MISSION

Our mission is to generate and provide resources for education and research to effect positive change in how people access, use and understand records and information.

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, FAI, 2009 Chairman

First I want to say it has been a pleasure to serve the Foundation as the Chair for the past three years and to have been associated with the Foundation Board of Trustees since 2001. Your Foundation is alive and well!

Looking back I am amazed at how far we have come from merely an idea to actually funding unbiased, independent research on current topics and funding scholarships for students pursuing a master's degree. Four scholarships were funded in 2009 with the addition of the Mavis Eppes Scholarship.

Please note the update to our mission statement so that it more clearly aligns with the goals that support your Foundation: "Our mission is to generate and provide resources for research, education and scholarships to continually advance our profession." In addition to funding we must also generate the financial resources to support the funding aspect.

On behalf of the Board of Trustees I would like to thank you for your continued support and financial contributions to advance our profession. I believe you will see more exciting research in 2010 as well as scholarship recipients who are future RIM professionals.

FROM YOUR FOUNDATION VICE-CHAIRMAN

H. Larry Eiring, CRM, FAI, 2009 Vice-Chairman

As we begin the second decade of a new century, the ARMA International Educational Foundation finds itself at an exciting and challenging crossroads. Over our 13-year history, the Foundation has overcome great challenges and reaped equally great rewards. Awareness of the Foundation's mission has expanded globally, our research program has offered over fifteen valuable research papers to the profession, we have granted over \$ 60,000 in educational scholarships to deserving students in the field of records and information management and mutually beneficial partnerships have been forged with The International Records Management Trust and The International Council on Archives.

While the current economic downturn has tempered the pace of our success, it has not deterred our determination to create new opportunities to grow and strengthen our profession and the global professional community we serve. We know that this work will not be easy, nor will it be completed quickly.

In order to meet these challenges, our Foundation has subscribed to a bold, new vision, focused on making a positive impact on our global community through support of research, education and scholarship in records and information management. In adopting this global vision, your Foundation Trustees have signaled their commitment to effecting positive change in how people access, use and understand records and information.

To achieve this vision, the Foundation Business Plan is focused on the following:

- ***Promotion and funding of research which addresses critical issues in records and information management;***
- ***Funding for educational scholarships at both the graduate and under-graduate level, which strengthen the capacity of individuals to pursue successful careers in records and information management;***
- ***Promotion and support for educational programs and efforts in records and information management globally.***

These broad goals will require significant funding and support. As in the past, your support of the Foundation's efforts will be crucial to achieving these goals and ensuring that our shared vision becomes a reality. To that end, the Board of Trustees and I look forward to you joining us on this exciting journey to make a real difference for the future of our profession and of our global community.

On behalf of the Foundation and our profession, thank you for your continued and future support.

YOUR FOUNDATION BOARD OF TRUSTEES



Susan B. Whitmire, CRM
Chairman



William W. LeFevre, CRM, CA
Vice-Chairman/Secretary (half year)



H. Larry Eiring, CRM, FAI
Vice-Chairman/Secretary (half year)



Philip Albert
Treasurer



Sharon Alexander-Gooding



Gail W. Bisbee



James Booth, CAE



Pamela Duane, CRM



Irene Gelyk, CRM



Pilar C. McAdam, CRM



R. Stephen Richards



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 twelve significant Research Publications, including two reports out this year
- To be published soon, 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 six 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 ten 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 \$184,000 in pledges, essential to Foundation growth, by 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
- Expanded the reach of the Foundation through an accord with the International Records Management Trust (IRMT) for funding educational initiatives in developing countries.
- Collected reference books on RIM topics for distribution by the IRMT to African school libraries.
- Established Evergreen Society, an automated donation payment system, as a convenience for donors.
- Partnered with GoodSearch.com and the Pittsburgh Foundation One Day of Giving Program to generate additional donations
- 44 ARMA members contributed \$688 to the Foundation by using the check box provided by ARMA International on the membership renewal form

SALUTING OUR 2009 CHAPTER FOUNDATION CHAMPIONS

Pam Duane, CFC Chair

Chapter Foundation Champions (CFCs) are the heroes of the Foundation. These special people are the backbone of the Foundation as they work to promote AIEF programs and activities within their ARMA chapter. CFCs serve as liaisons between the Foundation and their local chapters. They generate excitement for the Foundation, keep members informed about the latest research projects and how to access them, encourage applications for the AIEF Scholarship Program, ask members to make pledges to the 5/100 or Evergreen programs, and promote ARMA Conference events like the silent auction and raffle ticket sales.

There are currently 89 CFCs, and without their steadfast support, we would be unable to accomplish as much as we have. The Foundation salutes the dedicated 2009 Chapter Foundation Champions listed below.

Canadian Region

Calgary Chapter: Pat Hirsche
Edmonton Chapter: Karen Ng
Edmonton Chapter: Maggie Shane
Montreal Chapter: Alain Desrosiers
Saskatchewan Chapter: Sarah Mamer
Southwestern Ontario Chapter: Valdene Wager
Toronto Chapter: Irene E. Gelyk
Vancouver Chapter: Alexandra Bradley
Vancouver Chapter: Deirdre Bradshaw
Winnipeg Chapter: Richard Weinholdt

Great Lakes Region

Central Illinois Chapter: Nicholas De Laurentis
Chicago Chapter: Beth Chiaiese & Steven Lockett
Detroit Chapter: William LeFevre
Greater Columbus OH Chapter: Eugenia Brumm
Frankfort-Bluegrass Chapter: Mark Myers
Greater Cincinnati Chapter: Robin Jacobs
Greater Cleveland Chapter: Komal Gulich
Greater Dayton Chapter: Chris Wydman
Greater Indianapolis Chapter: Gene Jend
Louisville Chapter: Kathy Goss
Madison Chapter: Timothy Hughes
Mid-Michigan Chapter: Julie Gee
Milwaukee Chapter: Dennis Larsen
Western Michigan Chapter: Greg George

Great Northwest Region

Boise Valley Chapter: Tommy Terrall
Columbia Basin Chapter: Elena Ramirez
Greater Anchorage Chapter: Jeff Skowen
Greater Seattle Chapter: Dean Koga
Puget Sound Chapter: Barbara Werelius
Bellevue/Eastside Chapter: Fran Blaylock

Mid-Atlantic Region

Pittsburgh Chapter: Ruth Snyder
Richmond Chapter: Pat Noble

Midwest/Rocky Mountain Region

Big Sky Chapter: Rhett Hollar
Central Iowa Chapter: Susan Lees
Central Missouri Chapter: Craig Kelso
Greater Kansas City Chapter: Todd B Knowles
Mile High Denver Chapter: Mollie Taggart
Nebraska Chapter: Jerry Petersen
North Dakota-Bismarck/Mandan Chapter: Les Bossert
Northern Colorado Chapter: Vicki Lucero
St. Louis Chapter: Audrey Newcomer
Twin Cities Chapter: Beth Zaspel
Utah-Salt Lake Chapter: Pat McFerson
Wyoming Chapter: Donna Crock

Northeast Region

Boston Chapter: Kimberly A Kenney
Central New York Chapter: Lorraine Anderson
Connecticut Chapter: Anita Castora, Ray Jansak & Cynthia Trefethen-LeMay
Metropolitan New York City Chapter: Melissa Dederer

Pacific Region

Central California-Bakersfield Chapter: Eleanor Ozaeta
Central Coast Chapter: Noel Diaz & Starla Lago
Golden Gate Chapter: Mark Anderson
Greater Los Angeles Chapter: Mary Cusick & Pilar McAdam
Greater Sacramento Chapter: Chuck Brabec
Hawaii Chapter: Keith Siu & Brian Moriki
Mt. Diablo Chapter: Karen Denton
Northern New Mexico Chapter: Fred Walden
Orange County Chapter: Juanita Skillman
San Diego Chapter: Berl Benay & Kimberley Kenney
Silicon Valley/Santa Clara Chapter: Michael Goode
Southern California Inland Empire Chapter: Steve Gray
Utah-Salt Lake Chapter: David M Fleming & Marcie Fujikawa
(No Chapter Affiliation): Gari Young

Southeast Region

Greater Chattanooga Chapter: Susan B. Whitmire
Jacksonville Chapter: John Lazuk
Knoxville/East Tennessee Chapter: John Phillips,

Southwest Region

Arizona Chapter: Doreen Fox

Austin Chapter: Tad Howington

Baton Rouge/Lafayette Chapter: Carrie Fager

Dallas Chapter: Jociel Brooks, Linda Phillips & Debra Robinson

Fort Worth Chapter: Stella Moten

Houston Chapter: Denise Heppler-Balkum, John Peden, & Mary White-Dollmann

Longview/ARK-LA-TEX Chapter: Glenda Wood

Midland/Permian Basin Chapter: Cynthia Mayes

Oklahoma City Chapter: Deanna Brouillette

South Texas-Corpus Christi Chapter: Diana Eyhorn

(No Chapter Affiliation): Skip Litt



CHAIRMAN'S CIRCLE ADVISORY COUNCIL

The Foundation greatly values all donors who have helped build a solid Foundation Endowment. There are however, several donors who have consistently and generously given significant funds in support of the Foundation's mission. Beginning in late 2010 the twenty-five donors who have contributed most significantly to the Foundation will be invited to join the *Chairman's Circle Advisory Council*. These dedicated individuals will have the opportunity to assist in advising the Chairman on issues facing the Foundation and our profession in order to add a broader perspective upon which the Board of Trustees can make decisions regarding fundraising, program development and research topics. The Council will also be an opportunity to recognize our most valued and significant supporters.

For the Foundation 2010 – 2011 year, the members of the Chairman's Circle Advisory Committee are:

Tony Adams, CRM
Douglas Allen, CRM
Bruce E. Bailey, CRM
William Benedon, CRM, FAI
Jean Brown, CRM, FAI
Susan Cisco FAI CRM
Terrance Coan, CRM
Jim Coulson, CRM, FAI
Bruce Dearstyne, CRM
Judith Field
Komal Gulich, CRM
Maurene Hogue
Tad Howington, CRM, FAI
Timothy Hughes, CRM
William LeFevre, CRM
Deborah Marshall
Bonita Nadler, CRM
Robert Nawrocki, CRM
J. Michael Pemberton, CRM, FAI
Paul J. Singleton
Juanita Skillman, CRM, FAI
Helen Streck, CRM
Pat Vice, CRM
Susan B. Whitmire, CRM, FAI

Thank you for your continued and dedicated support of the Foundation and the future of our profession!

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 2009:

Mile High Denver Chapter - \$500 grant for research
Canadian Region Conference Party Donations - \$727
Canadian Raffle - \$655
Canadian Silent Auction - \$3,594 in donated items and auction proceeds
United States ARMA Chapter Donations - \$6,246
The Clancy's - \$250
Speaker Honorarium Contributions - \$1,530
Vancouver Chapter Contribution for Book Distribution in Africa - \$1,032
LaARMA Nostra - \$1,163
Corporate Matching Gifts - \$205
Memorial Gifts - \$1,486
Partner Organizations – PRISM \$1,650
 - Goodsearch \$43
 - Association for Information Protection - \$750
United States Raffle - \$5,185
Canadian Region Endowment Fund Donations - \$8,594
Bruce Dearstyne Book Royalty - \$904
United States Silent Auction - \$8,650 in donated items and auction proceeds

Why Should I Donate to My Foundation?

Programs funded by your Foundation will help to secure the future health and stability of our profession and the development of a global community that can learn, interact and live harmoniously together. 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 and to the larger global community 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 Make A Difference?

Evergreen Society – This new program is for donors who want to “go green” and forget the hassle of writing checks or making special payments and really want to support the Foundation with a scheduled (e.g., monthly) donation. It is an easy and perpetual way to make a lasting difference. This program can be set up on the Foundation web page.

5/100 Pledges - You can pledge \$100 a year for five years towards building your Foundation Endowment. Pledge payments totaling \$500 (or more) are 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. Pledge forms can be found on your Foundation website (www.armaedfoundation.org) or by contacting your Chapter Foundation Champion (CFC).

Planned Giving - You have the opportunity to leave a lasting legacy towards ensuring our profession’s future by remembering the Foundation in your estate. There are multiple planned gift vehicles available, including direct-beneficiary in a will, trust, insurance policy or annuity. Pledging a planned gift to the Foundation’s endowment provides a way to “leave YOUR legacy” for future generations.

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.

Remember, arrangements specific to your pledge are made confidentially with the Foundation Administrator.

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.

2009 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:

Gary Lewis:

Northern Virginia Chapter
Liberty Bell Chapter of Philadelphia
Southern California Inland Empire Chapter

Barbara Rike

Marc Simpson

Phyllis Parker

Alice Young
Chris Akers
Juernene Speights

William Ptacek

Mile High Denver Chapter

Alan Andolsen

Pilar McAdam
Juanita Skillman
James Booth
Preston Shimer
Susan Whitmire
William Benedon
St. Louis Chapter
Larry Eiring

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

FOUNDATION PLANNED GIFT DONORS

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

Your Foundation ***Share Your Legacy*** campaign gives you the opportunity to leave a lasting legacy towards ensuring that future generations of information management professionals and practitioners can be successful 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 that 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*** who 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

2009 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

Ann Samek
Ben Hickman
Bill Kirby
Bruce Schinkelwitz
David Mitchell
Diane Carlisle, CRM
Donald Schewe
Doug Allen
Fred Pulzello
Jacque Nack-Ngue, JD
Jennifer Winkler
Jesse Wilkins, CRM
John Isaza, Esq.
John Littler
Josh Butler
Karen Green
Kit Bright
Mart Martin
Patrick Cunningham, CRM
Susan Whitmire, CRM
Tom Klaff
Ty Routley

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

2009 FOUNDATION RAFFLE

The 2009-2010 AIEF Raffle featured 3 conference registrations for the 2010 ARMA International Conference in San Francisco as well as a Blackberry Smartphone and a Wii. Drawings for the Blackberry and the Wii were held at the 2009 ARMA International Conference in Orlando and drawings for the registrations were held at the AIEF business office in Pittsburgh in May of 2010.

The 2009-2010 raffle netted over \$5,000 for the AIEF.

Special Thanks to our donors for the 2009-2010 raffle:

ARMA International
Irene Gelyk and Research in Motion
William LeFevre and the Walter P. Reuther Library
Juanita Skillman
Pat Vice

The 2010-2011 AIEF Raffle will feature 2 conference registrations for the 2011 ARMA International Conference in Washington, D.C. as well as a Blackberry Smartphone and a Kindle. Drawings for the Blackberry and the Kindle will be held at the ARMA International Conference in San Francisco in November, 2010, and the drawings for the registrations will be held at the AIEF business office in Pittsburgh in May of 2011.

Special Thanks to our donors for the 2010-2011 raffle:

ARMA International
Irene Gelyk and Research in Motion
William LeFevre and the Walter P. Reuther Library
William Manago and Autonomy, Inc
Pat Vice

2009 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 2009 Silent Auction in Orlando raised \$9,617 from 200 bidders with 115 donated items from 85 chapters and 25 vendors. The variety and selection of donated items makes this a truly unique event each year. The success is attributed to all the donors and their creativity and to ARMA International's expo staff that make it all happen.



Thanks to the auction volunteers – without their help this would not have been possible.



Helen Streck, Co-Chair

Fran Blaylock
Fred Coakes
MJ DeFeo
Pam Duane
Rob Giganti
Tim Hughes
Cindi LeMay
Deb Marshall
Steve Richards
Rick Weinholdt
Mike Zampella



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

2009 FOUNDATION SPONSORED RESEARCH PROJECTS

Pilar McAdam, CRM, AIEF Research Committee Chair

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

Research Projects for 2009 - 2010 fiscal year (presented at Orlando Conference):

Requirements for Personal Information Protection, Part II – US States
Virginia Jones, CRM, FAI

Challenges of Records Management in the Developing World
Anne Thurston

Research Projects under contract for 2010 - 2011 fiscal year:

Social Networks' Impact on Records and Information Management
Helen Streck (to be presented at San Francisco conference)

Metadata in Court: How the Courts Have Been Treating the Issue
John Isaza, Esq. (to be presented at San Francisco conference)

Core Works
April Norris, FAI (to be published to AIEF website)

Commonly Referenced RIM Standards and Best Practices
Virginia Jones, CRM, FAI (to be published to AIEF website)

Research Projects planned for 2011 – 2012 fiscal year (to be presented in Washington, DC)

Absorptive Capacity and Records Management: Exploring the Relationship
David Gaynon, CRM

Update to RIM Checklist for Mergers, Acquisitions, Divestitures and Closures
John Phillips, CRM, FAI

The Research Committee welcomes proposals for future Research Projects at any time. Potential projects are scheduled three years out, for presentation at future ARMA conferences.

2009 FOUNDATION SPONSORED SCHOLARSHIPS

Pamela Duane, CRM, Scholarship Committee Chair



Cherri Ann Beckles is currently pursuing a PhD in Archives and Information Studies at the University of Dundee, Scotland. Her research topic examines international privacy/data protection regimes from a records and archives management perspective. She is the Assistant Archivist at The University of the West Indies, Cave Hill Campus, Barbados. Mrs. Beckles received a B.A. Degree with Honors from The University of the West Indies (UWI), a Master's Degree in Records and Archives Management (International) from the University College London and a Masters Degree from UWI in History.



Jennifer Borland is enrolled in the Joint Master of Archival Studies and Master of Library and Information Studies at the School of Library, Archival and Information Studies at the University of British Columbia in Canada. She has served as the co-president of the Library and Archival Studies Students Association, is working as a Graduate Research Assistant on the InterPARES 3 Project, and is also working in a cooperative education position at British Columbia Hydro and Power Authority. Jennifer is interested the management and the long-term preservation of digital records, recordkeeping metadata, and she is particularly interested in the role of trust within the records profession.



Matthew Grant, recipient of the first Mavis Eppes scholarship, is a Masters of Science in Information candidate in the School of Information at the University of Michigan. He is pursuing dual majors specializing in Archives and Records Management and Incentive-Centered Design and will receive his degree in December, 2010. He also is employed at the Rackham Graduate School as a Business Systems Analyst where he is working on an enterprise content management solution using Microsoft SharePoint. He is very interested in understanding how business processes and the resulting records can be managed and captured in an efficient system while providing end users with the proper incentives to effectively and ethically use those systems.

FOUNDATION OUTREACH

Irene Gelyk, CRM

The Foundation continues to build upon the partnership with the International Records Management Trust (IRMT) and is seeking out new partnerships with other similarly-focused organizations.

In response to a \$1,000 challenge grant from the Toronto chapter in April 2009, two ARMA chapters kindly raised funds to be applied towards providing Records & Information Management textbooks to African countries that have recently started pre and post-graduate RIM programs:

Vancouver Chapter (\$1,032)

Orange County Chapter (\$1,000)

We continue to look for opportunities to identify targeted initiatives to encourage Chapters to raise funds such as the textbook program.

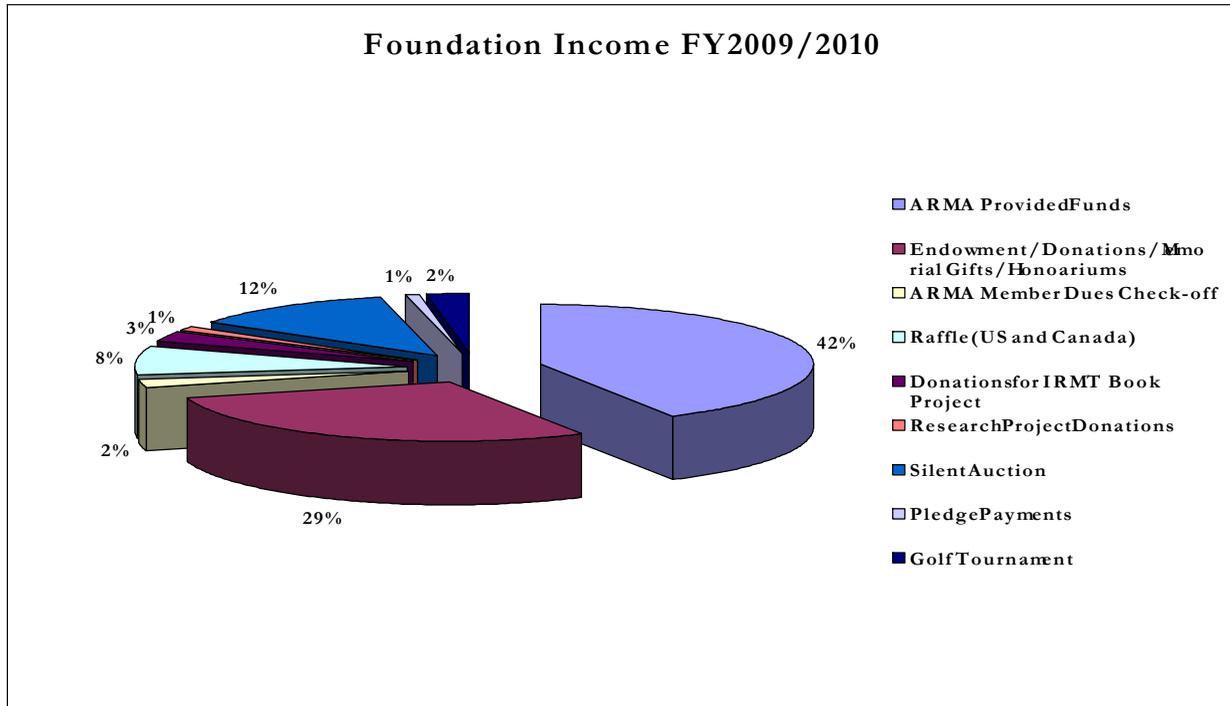
FOUNDATION 2007 FINANCES

Phil Albert, Sr., AIEF Treasurer

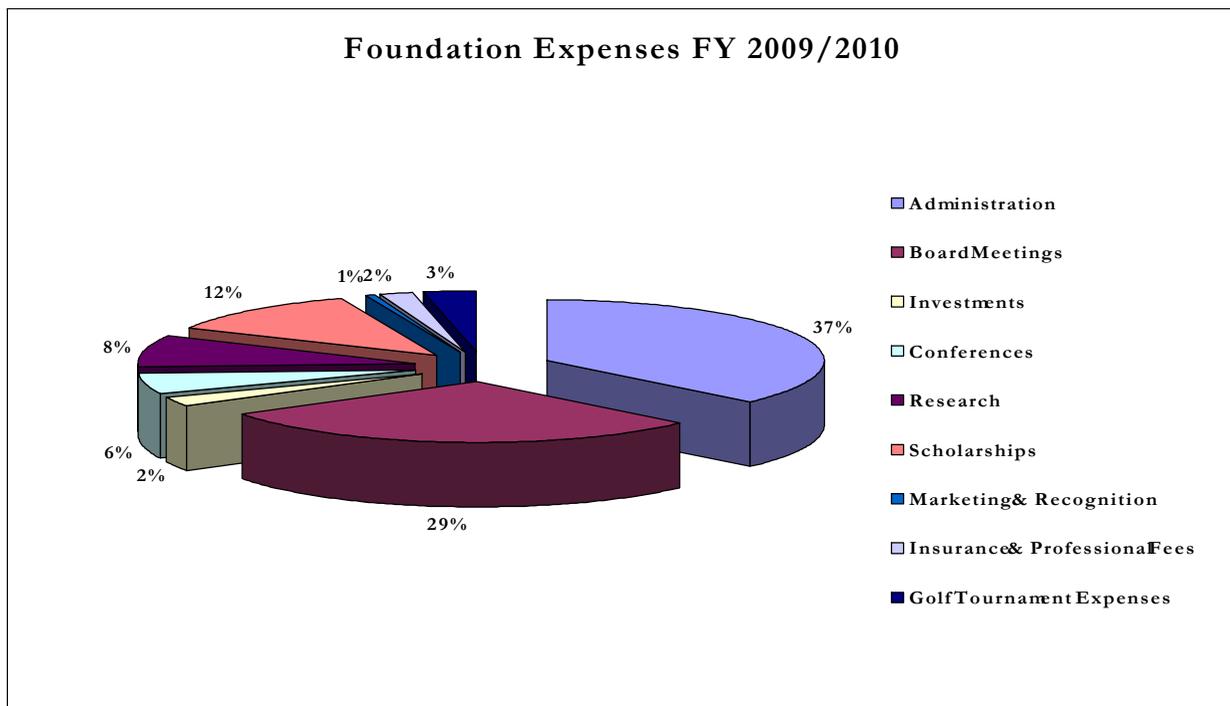
Where Does Your Pledge, Memorial, or Endowment Contribution Go?

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

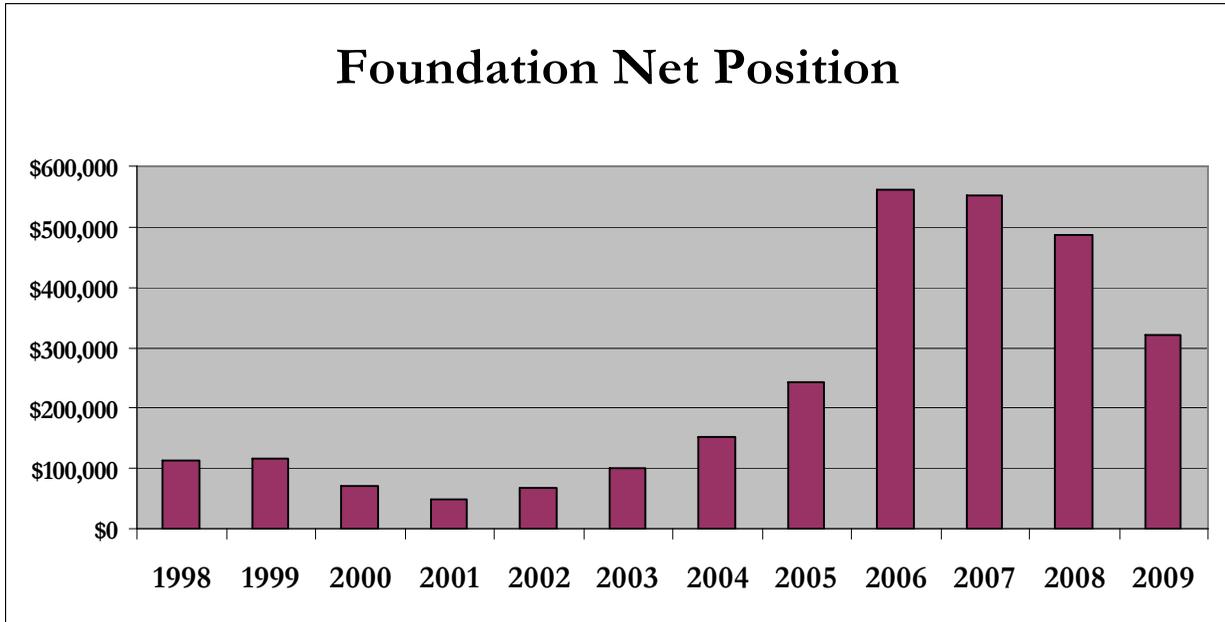
FOUNDATION SOURCES OF INCOME - 2009



FOUNDATION EXPENSES- 2009



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

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