



ARMA INTERNATIONAL
**EDUCATIONAL
FOUNDATION**

RESEARCH · EDUCATION · SCHOLARSHIP

2012-2013 ANNUAL REPORT

July 1, 2012 – June 30, 2013

The Foundation helps enhance the profession and helps people succeed by improving their ability to solve real world records and information management problems through awarding scholarships, supporting international education, and funding relevant research.

www.armaedfoundation.org

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ARMA International Educational
Foundation
1609 Terrie Drive
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ARMA INTERNATIONAL
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FOUNDATION**

RESEARCH · EDUCATION · SCHOLARSHIP

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Philanthropy Helps Members

Access Scholars Endowment Created: \$25,000 Pledged Over Three Years

AIEF and Access Corporation joined forces to provide new scholarship resources to enable in-service outstanding RIM practitioners advance to positions of greater responsibility that require college degrees and to advance in their leadership roles in the industry itself. Two scholarships will be awarded annually for at least the next three years, one for \$6,000 and a second for \$2,000. AIEF is excited about this partnership and anticipates others in the future. www.armaedfoundation.org

Investing in Thought Leaders – Graduate Scholarships

AIEF regularly awards nine graduate scholarships annually. These scholars attend outstanding programs, including at the University of Maryland, New York University, San Jose State, Long Island University, Pennsylvania State, University of California - Los Angeles, University of Michigan, University of Pittsburgh, McGill, and the University of British Columbia. Each year, applications are received from a wider range of graduate programs. For the second year in a row, awardees participated in “poster sessions” of their research at the ARMA Conference.

Research Projects for Practitioners

The *Online Directory of English Language Records and Information Management Courses at Accredited Colleges and Universities* is proving to be a core resource – to provide notices about scholarships and to solicit ideas for research. The AIEF Research Committee is always interested research proposals and ideas. Working more closely with ARMA, AIEF expects to continue to fund research that helps practitioners succeed. www.armaedfoundation.org/school_database/main.shtml

Professional Development – Helping Members Pursue College Degrees

Five \$1,000 Undergraduate Tuition Reimbursement awards were made for the Fall 2012 semester and two such awards were made for the Spring 2013 semester. This program aims to help ARMA members work toward an undergraduate degree to improve opportunities for success in their careers and to qualify for promotions. AIEF has budgeted for 20 awards each year. If you or a colleague are pursuing an undergraduate degree consider applying for one of the tuition awards. www.armaedfoundation.org/grants_scholarships.html

Long-term Continuity and Increased Capacity Thru Partnership with ARMA

AIEF and ARMA International have executed an agreement whereby ARMA will provide specific support services to AIEF. This will ensure long-term and strategic continuity for the Foundation and provide increased support capacity for AIEF’s programs. www.armaedfoundation.org



Dear AIEF Friends,

Exciting news: AIEF and ARMA International have agreed to join forces, ensuring long-term and strategic continuity as well as increased capacity for AIEF and its fundamental efforts. The organizations have executed an annually renewable agreement for ARMA International to perform specific operational and financial services on behalf of AIEF.

Your philanthropic support is critical to AIEF. Your donations fund a variety of scholarships, tuition reimbursement, research for ARMA members and the RIM/IG community, and valuable educational initiatives. Your involvement allows us to increase the number of scholarships, fund important research to meet the evolving needs of those in our profession, and to support international RIM/IG education. I urge you to increase the level of your support, or to make a first-time gift.

Your support and additional funding will allow AIEF to:

- Continue to increase the number of graduate scholarships – future thought leaders!
- Conduct relevant RIM/IG research – for practitioners and the professions
- Support IG and RIM education – in North America and internationally
- Expand tuition reimbursement and other scholarship offerings

There are many convenient ways to support AIEF:

- Automatic monthly contributions/deductions
- Chapter donations for research or a named scholarship
- Silent Auction – Donate/bid at the US or Canada conference
- Raffle – Win cool stuff by purchasing a raffle ticket (or two!)
- Donations of speaker honorariums
- Memorial gifts to honor a RIM colleague
- Planned giving offers tax benefits and maximizes giving

Your gift is tax deductible

Need an end of year tax deduction that will make a difference? Contributions to AIEF 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.

AIEF is your way to give back to the RIM/IG community. Be a philanthropist!

Sincerely yours,

Nicholas De Laurentis, CRM, IGP
Chairman, Board of Trustees
ARMA International Educational Foundation

YOUR INVOLVEMENT



Access Leadership Scholars Endowment Established

AIEF and **Access Corporation** have joined forces to provide new scholarship resources to enable in-service, outstanding records and information management (RIM) practitioners to advance to positions of greater responsibility that require college degrees and to advance in their leadership roles in the industry itself.

Access has committed to providing \$25,000 over three years to AIEF to be used to fund the *Access Leadership Scholars Program*.

Announcing the program's creation, Access Chief Executive Officer Rob Alston, said *"The Access Leadership Scholars Endowment is important to us for many reasons. Our company highly values personal, professional achievement and we believe in helping make that happen. Facilitating advancement of people engaged in our industry – those who will shape its future – is a responsibility we believe falls squarely on our shoulders if we are to succeed in carrying out our company's stated mission. We are proud to have established this partnership with the ARMA International Educational Foundation and look forward to funding this endowment for many years to come."*

Nick De Laurentis, CRM, Chairman of the AIEF Board of Trustees, stressed that *"The Access Leadership Scholars Endowment strengthens our current tuition reimbursement grant program by enabling larger scholarships for our most promising applicants. Access' participation is going to make a real difference in the upward mobility for talented people held back by the lack of a degree. We sincerely thank Access for establishing this program."*

Two awards - of **\$6,000** and **\$2,000** each - are available for the **first time** to actively-engaged RIM practitioners who are currently pursuing a college degree.

Applicants must meet the following requirements:

- currently employed as a RIM practitioner,
- five years of experience working in RIM,
- ARMA member in good standing for at least one year,
- currently enrolled in an accredited college degree program,
- completed two semesters with a grade of C or above.

For more information, go to www.armaedfoundation.org



2012 – 2013 GRADUATE SCHOLARSHIP RECIPIENTS

Ten graduate scholarships were awarded for advanced study in the field of information governance and information management to the following:



Chad Doran, CRM, the winner of the **Rita Holt Scholarship**, is a PhD student in Information Studies at the University of Maryland iSchool, in College Park, MD. Prior to entering the doctoral program, he earned a B.A. from the University of Notre Dame, a Master of Business Administration from Johns Hopkins University, and a Master of Information Management from the University of Maryland. In addition, he is a Certified Records Manager (CRM) and is the outgoing President of the Greater Baltimore Maryland Chapter of ARMA. Chad is currently the Chief Records Management Officer for the Arlington County government and has over 10 years of experience in the field of records and information management. He is currently studying how federal agencies manage records generated by social media applications. His submitted research paper is titled: [Anticipating Disruptive Innovation in Records Management](#)



Miriely Guerrero holds a B.A. in Anthropology with a minor in Computer Science from Florida International University. She is currently pursuing a Master's degree at the University of Michigan, with a dual specialty in Archives and Records Management and Preservation of Information. Miriely's interest in the industry was born out of her experience with out of control shared drives and she is motivated by a desire to create efficiency and streamline workflows via automation. As an officer in the student chapter of the Society of American Archivists at the University of Michigan, she is working at raising awareness of the records management field and partnering students with local organizations in need of information management help. Her submitted research paper is titled: [The Role of Accountability Aware ERM Systems](#)



Kane Klemic earned his Master's degree in English, with a concentration in Early Modern Studies, from the University of Victoria, and his B.A. in English from the University of California, Irvine. He is currently pursuing a dual Master's of Archival Studies and a Master's of Library and Information Studies degree program at the University of British Columbia. His research interests are somewhat disparately polarized between historiographical matters of early manuscripts, textual studies, and the treatment of early printed books (especially later editorial intervention) on one hand; and the thorny contemporary issues of copyright law, the management of digital records, and the preservation of video games on the other. His submitted research paper is titled: [Payment Card Industry Standards and the Sony Data Breach](#)



2012 – 2013 GRADUATE SCHOLARSHIP RECIPIENTS



Valerie L veill e, winner of the **Mavis Eppes Scholarship**, holds a B.A. (Hons.) in History from Laurentian University in Sudbury, Ontario and she is currently pursuing Masters Degrees in Archival Studies and Library and Information Studies at the School of Library, Archives and Information Studies (SLAIS) at the University of British Columbia, Canada. Valerie is Co-Coordinator for the Association of Canadian Archivists (ACA) Student Chapter at UBC, Secretary for the Library and Archives Studies Student Association (LASSA) and volunteers with the local ARMA Vancouver Chapter. Having recently completed an internship with the City of Richmond, her primary research interests focus on corporate information management and government-level recordkeeping standards of practice. Her submitted research paper is titled: [The Federal Government Should Never Delete or Destroy Any Documents or Records](#)



Lara Mancuso has a professional background in records and information management in the legal and healthcare sectors. She holds a Bachelor of Applied Sciences in Electrical Engineering from the University of S o Paulo, Brazil, and a PhD in History from El Colegio de M xico, Mexico. Lara is interested in the use of new technologies associated with digital repositories and content management systems. She is currently pursuing a Master's in Archival Studies at the University of British Columbia, Canada. Her submitted research paper is titled: [Appraisal as a Records Management Tool: The Brazilian Case](#)



Victoria Ostrzenski holds a B.A. with a double major in Economics and Development Studies from the University of Calgary, and is pursuing a Master's in Archival Studies from the iSchool at the University of British Columbia, Canada. Her research critically examines the preservation needs of different forms of digital records. The characteristics, challenges, and requirements of e-commerce records is one area of particular interest. Their non-traditional format necessitates a reconfiguration of theory as pertains to the concept of the "record", and implores that RM practitioners commit to opening up dialogues with IT and IS specialists in order to optimize practices for preservation. Her submitted research paper is titled: [Reconfiguring Perception and Procedure: An Exploration of the E-Commerce Record](#)



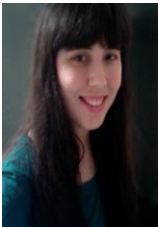
Kevin Owen holds a B.A. in English from the University of Alberta, and is currently pursuing a Master's degree in Archival Studies at the University of British Columbia's School of Library, Archival and Information Studies. He recently completed an internship at the City of Vancouver Archives. His research includes analyzing the culturally-determined webs of signification and referential knowledge which govern the way people understand, treat, and interact with records. His submitted research paper is titled: [A Vestigial Respect: A Mythological and Semiological Approach to an Understanding of the Social Construction of Records](#)



2012 – 2013 GRADUATE SCHOLARSHIP RECIPIENTS



Joy Rowe holds a B.A. in Linguistics from the University of Michigan and a Master's degree in African Studies from the University of Cape Town. She is currently pursuing a Master of Archival Studies degree at the University of British Columbia in Vancouver and has a strong interest in digital records. While studying in South Africa on a Rotary Ambassadorial Scholarship, she discovered the power of documenting memory while working with the records of the Truth and Reconciliation Commission. Her research interests include the innovative digital record-making activities of protest and activist groups, including Occupy Vancouver. Currently, she works at Vancity, Canada's largest credit union, in a knowledge and records management role. Her submitted research paper is titled: [Occupy Vancouver: Leaderless and Recordless?](#)



Isabel Taylor holds a B.A. in History, with minors in French and German, with Distinction from Mount Allison University, a Graduate Diploma in Law with Distinction from the University of Northumbria at Newcastle, and was previously a Wertewelten scholar in the Faculty of Law at Eberhard Karls Universität Tübingen. She is currently enrolled in the Master of Archival Studies program at the University of British Columbia, where she has been active as a researcher for the German section of the International Council on Archives terminology database project. Previous work experience includes academic editing and translation, online publishing, language teaching, and secretarial support in a German law firm. Her research focuses on the development of appraisal theory, especially in the German-speaking world, and the intersection between law and the archival and records management fields. Her submitted research paper is titled: [The Data Protection Act 1998: Challenges and Benefits for Records Management.](#)



Stephanie Woods, winner of the **Leadership Scholarship**, received her B.A. with double majors in History and Political Science from the University of New Brunswick. She is beginning her second year at Dalhousie's School of Information Management, pursuing a Master's degree in Library and Information Studies. For over the past year she has been working with the City of Saint John in New Brunswick, assisting the Corporate Records Manager implement a new electronic information system that will fully capture City Hall's digital information. Her interests are in digital records management; specifically the access and retrieval of records through the use of a taxonomy and organization of metadata within electronic systems. Her submitted research paper is titled: [Anyone Can Be an Information Manager, Right? Why Information Management Professionals are Vital to the Strategic Business Plan.](#)

SCHOLARSHIPS



2012 – 2013 UNDERGRADUATE TUITION REIMBURSEMENT

A total of seven Undergraduate Tuition Reimbursement Awards were made during the first year of this program. Some of the seven recipients - all ARMA members - got a boost to complete their college degree.

The Trustees remain convinced that there is a real need for ARMA members to have undergraduate degrees. We believe that many records and information management practitioners do not have undergraduate degrees and want to work towards one to advance on their career path. In the coming year, we are hoping to help even more ARMA members.

Meanwhile, if you or someone you know could use assistance, please visit the website at www.armaedfoundation.org/grants_scholarships.html

The criteria for applying for undergraduate tuition reimbursement are:

- ARMA member with at least one year of membership
- Currently working, with at least one year of work experience
- Enrolled-in course(s) must be offered by an accredited college or university
- Course(s) must be RIM-related or demonstrably relevant to RIM career (e.g., budget and finance, human resources, contracts, leadership etc., not music theory)
- Already successfully completed at least two semesters

Undergraduate Tuition Reimbursement will be awarded as follows:

- Notification of award will be made twice each year near the start of the fall and spring semesters
- Funding will not be provided until successful completion of a course(s) at the end of a semester with proof of a satisfactory grade (C or above). Students will have paid tuition at the time of registration with AIEF reimbursement following the successful completion of the course(s).

This program provides direct benefit and value to ARMA members striving to better their careers.

Spread the word!



2012 – 2013 RESEARCH

The Foundation continues to fund research projects that provide relevant information to RIM/IG practitioners to help them succeed. Copies of all AIEF research reports are posted at www.armaedfoundation.org/report1.html and can be downloaded free of charge.

An Online International Directory of English-Language Courses in Records and Information Management at Accredited Colleges and Universities Researcher: [Greg Gardner, San Jose State](#)

Records and information management practitioners regularly inquire about and search to find courses in records and information management to improve their expertise and skills, or to validate experience and skills acquired in the field for existing or potential employers. This project established an online, updateable directory of English-language RIM courses. It has furthered the professional legitimacy of RIM by providing a needed resource for new and existing members. Along with the existing Core Works Bibliography for the RIM Profession, the Code of Professional Responsibility, the Core Competencies, and ICRM Certification, such a directory provides and guides educational path options for potential, new, and experienced professionals, becoming part of a theoretical and practical foundation for the field, facilitating the recognition of RIM as a career choice, and inspiring public confidence in the RIM profession. This online directory is now available free of charge on the AIEF website at www.armaedfoundation.org/school_database/main.shtml and provides course listing at the Associate, Undergraduate, Master's and PhD level. This project was funded by the Greater Washington DC Chapter.

Records Management and Peer-Reviewed Journals: An Assessment Researchers: [Donald Force and Elizabeth Shaffer, University of British Columbia](#)

The project aimed to determine the amount of interest among records professionals for a peer-reviewed journal devoted to issues in records and information management (RIM) in the United States and Canada. The findings from this research project are providing an understanding of: 1) The level of interest for a peer-reviewed records management journal by records professionals in the United States and Canada; 2) The type of content and subject areas that records professionals would like to see explored in more detail; and 3) The survey results in the current context of peer-reviewed journals in archival science and related fields. The project held a public forum at the ARMA International annual conference in Chicago last year to provide interested professionals with an opportunity to ask questions and provide information to the researchers as well as at the Canadian Regional Conference before the report was finalized.



2012 – 2013 RESEARCH

Implementing Litigation Readiness

Researcher: John T. Phillips, CRM, FAI, CDIA+

A major benefit of RIM programs is to reduce risks that accompany poorly organized and inconsistently retained records before, during and after litigation. In order to assure that their clients are managing records well in preparation for impending litigation, some law firms are now encouraging their clients to implement litigation readiness activities, including conducting records inventories, policy reviews, creating data maps of electronic records, and reviewing records retention rules. This research study determines the extent to which law firms are using these litigation readiness activities to prepare clients for litigation, and the role of industry information management associations and standards in facilitating these actions. The role of litigation readiness activities is also being investigated in light of guidance provided by records management standards and the support for these activities in the legal communities is being evaluated. The information gathered was presented at a session at the annual conference in Chicago and following that, the report was finalized.

Bi-Annual Update to: A Guide to Commonly Used National and International Records and Information Management Standards and Best Practices

Researcher: Mary Margaret Fletcher, University of Pittsburgh

A Guide to Commonly Used National and International Records Management Standards and Best Practices, was authored by Virginia Jones, CRM, FAI and published by the AIEF in 2010. The project researcher updated the current report by checking all existing references for correctness, identifying changes and determining if changes apply to the existing reference, updating the existing reference as appropriate, and indicating by code the review date. Any additional standards and guidelines that should now be included have been added. The Foundation has committed to updating this guide every other year. The next update will be done in 2014. This update is funded by the Greater Washington DC Chapter.



Chapter and Regional Support

The Foundation depends on donations to fund scholarships, undergraduate tuition reimbursement, educational initiatives and research projects. Silent Auction donations, honoraria donations, and cash contributions are all counted for the Chapter rankings.

The Regional rankings are based on member Chapter contributions and also donations by individuals who are within those Regions. Special thanks to the top contributors in each category who provided leadership donations!

2012 -2013 Regional Ranking

- | | |
|-----------------|-----------------------------|
| 1. Mid-Atlantic | 6. Mid-West/Rocky Mountains |
| 2. Canadian | 7. Southeast |
| 3. Southwest | 8. Northeast |
| 4. Pacific | 9. International |
| 5. Great Lakes | 10. Great Northwest |

2012-2013 Leadership Donations – Chapters

Very Large:	Greater Washington DC
Large:	Orange County
Medium:	Triangle Area-Raleigh
Small:	Diamond State

2012-2013 Leadership Donations – Special Organizations

La ARMA Nostra



2012 – 2013 - Chapter Rankings

Rank	<u>Very Large Chapters</u>
1	Greater Washington DC
2	Houston
3	Calgary
4	Vancouver
5	Atlanta
6	Toronto
7	Mile High Denver
8	Twin Cities
9	Greater Los Angeles
10	Edmonton

Rank	<u>Large Chapters</u>
1	Orange County
2	Detroit
3	Nebraska
4	Greater Seattle
5	Northern New Jersey-Summit
6	Northern Virginia
7	Austin
8	Greater Kansas City

Rank	<u>Medium Chapters</u>
1	Triangle Area- Raleigh
2	Utah-Salt Lake
3	Tulsa
4	Pittsburgh
5	Winnipeg
6	Mid-Michigan
7	Greater Cincinnati
8	Silver State
9	Madison
10	Northern Colorado
11	Newfoundland-Terra Nova -St John's
12	Atlantic
13	Nova Scotia
14	Greater Cleveland
15	Montreal

Rank	<u>Small Chapters</u>
1	Diamond State
2	Prince Edward Island
3	Central California-Bakersfield
4	Mt. Diablo
5	Bellevue/Eastside
6	Oklahoma City
7	North Dakota-Bismarck/Mandan
8	Wyoming

CHAPTERS



DONOR RECOGNITION

The Foundation is able to award scholarships and tuition reimbursement; provide research grants; and fund education projects through donations from individuals, regions, chapters, ARMA, and other organizational support. We thank those who have contributed.

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**Organizational
Support Groups**

Beginning in 2009, groups of individuals have joined together to support the Foundation with fund raising events and campaigns. The names of the donors who contribute via supporting organizations are recognized under Donor Recognition elsewhere in this report. The Foundation Trustees are grateful to the leaders of these organizations and to the individuals who participate. The largest of these is **La ARMA Nostra** which has raised more than \$13,000 to support the Leadership Scholarship.



Donor Recognition –USA & Canadian Silent Auctions

The Foundation conducts silent auctions at the ARMA Annual Conference and the Canadian Regional Conference as a method of raising funding for scholarships and education projects and providing research grants. Through donations of items and services to be bid on at the silent auction, individuals, chapters, regions, ARMA itself, and companies all provide support. We would like to thank those that have contributed and recognize them for their support.

ARMA Annual Conference Silent Auction Donors – Chicago, IL

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Dierdre Bradshaw	Northern Virginia Chapter
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Calgary Chapter	Open Text
Nicholas De Laurentis	Pittsburgh Chapter
Detroit Chapter	Lisa Polisar
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