



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

# ANNUAL REPORT

July 1, 2017 – June 30, 2018



The ARMA International Educational Foundation is a non-profit corporation with 501(c)3 tax exempt status in the US.

[www.armaedfoundation.org](http://www.armaedfoundation.org)

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# Message From The Chairman

To the Information Management Community:

Our results were the careful stewardship of \$20,000 invested in our profession by you, our professional partners La ARMA Nostra and Access. Our achievements included publishing three research papers; awarding three graduate-level scholarships, two Access Leadership Scholarships, and six La ARMA Nostra Certification tuition reimbursement awards; and updating the Foundation's marketing plan and social media with a new look. We have now completed another year of transformation within the Foundation. We have strengthened our leadership sustainability plan, improved our processes and had continuity of leadership changes in three committees to our newest Trustees. We have completed the first year of our multi-year strategic plan.

This coming year we will be focusing on bringing on new Committee members to share their experience and thoughts on our future. We held our first conference call with the entire Board of Trustees and all committee members in April 2019. We are strengthening our leadership sustainability plan by electing Donald Force, Ph.D. as Chairman, and Gita Werapitiya as Chair-Elect for the 2019-2020 year.

On behalf of the Board of Trustees, I thank all who support the Foundation's mission and generously contribute to its programs, especially Access, La ARMA Nostra, ARMA Canada and ARMA International, its Regions, Chapters and members. The success of the Foundation's research and scholarship programs is due to your commitment.

We look forward to your continued participation and support in our mission to fund and promote research, scholarships and educational opportunities for the information management profession. For more news and information on the Foundation, please visit <http://armaedfoundation.org> and follow us on Facebook, Twitter, and LinkedIn.

## **WE WANT YOU**

Are you interested in contributing as a Trustee and being part of the mission of sustaining the professional development and knowledge leadership by donating 3-5 hours per month to our profession?

Are you interested in contributing as a committee member by donating 1-3 hours a month to our profession? The amazing results that we accomplish with our many committee members can only happen with your continued support.

Please consider making a donation to the Foundation, a 501(c)(3) non-profit tax exempt corporation in the US, with a donation. You may be an experienced professional, wanting to give back to the profession, a practitioner new to the field and investing in your career, an ARMA chapter supporting your local peers, or an industry leader. [Consider donating.](#)

Sincerely,



**Michael S. Smith, DM-IST, CRM, IGP,  
Chairman, Board of Trustees  
ARMA International Educational Foundation (AIEF)**  
<http://armaedfoundation.org>  
[mike.s.smith@outlook.com](mailto:mike.s.smith@outlook.com)

# Vision & Mission

Our **MISSION** is to provide current and relevant resources to information management professionals that allow them to advance the profession.

Our **VISION** is to be recognized as a leading organization for facilitating research, scholarship, and education to advance the information management profession and its professionals.

## Strategic Focus & Direction



### Scholarships

Provide financial support to satisfy the needs of current and future information professionals.

Provide support research that addresses key issues and practical approaches that enhance the ability of practitioners to address their professional responsibilities.

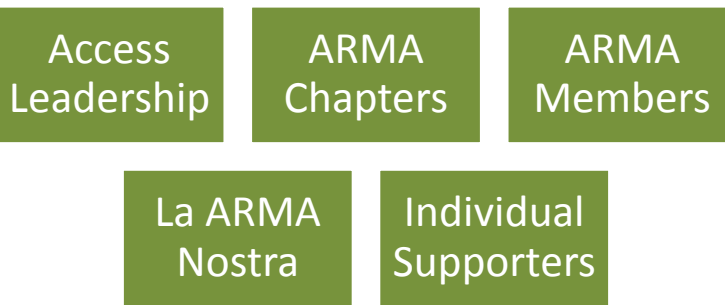


### Research

# Scholarships

The Foundation's scholarship program encourages the development of the information management community. To accomplish this, the Foundation offers funding opportunities for current and aspiring Information Management professionals.

## Current supporters of scholarship programs



### Access Scholarship

Provides funding opportunity for information management professionals to advance into leadership positions that require college degrees. Scholarships are awarded to professionals who are currently employed in the information management field, and who are enrolled in an associate, bachelor, or graduate level program in an accredited educational institution.

### Graduate Scholarship

Provides additional funding to qualified candidates pursuing graduate degrees in some aspect of information management.

### La ARMA Nostra

Provides funding opportunities to students and professionals earning certifications in the field of information management.

# Scholarship Recipients 2017-2018

**\$20,000 USD Awarded**

## Graduate Scholarships

\$9,000 total

Danielle Batista – University of British Columbia/ARMA Canada  
Jennette Chalcraft – University of British Columbia/ARMA Canada  
Dominique Glassman – University of Toronto/ARMA Canada  
Summer Shetenhelm – University of Denver  
Erica Vanden Bosch – University of Ottawa/ARMA Canada

## Access Leadership Scholarship

\$8,000 total

*Each received assistance for college while working*

Maggie Turner (\$6K)  
McKenna Wulker (\$2K)

## Certifications

\$3,000 total

*Funded by La ARMA Nostra contributors*

Gil Brueckner – NC  
Azure Brown – TX  
Mandy Coghil – YK, Canada  
Jackie DiOrio - CA  
Donna Faler - LA  
Mary Marquez - TX

# Research

The Foundation's research program recognizes the status of the body of knowledge that informs the information management field, anticipates where it is headed, and determines what it can do to support information management issues, challenges, questions, opportunities, and/or possibilities. The Foundation seeks to support research that addresses key issues and practical approaches that will add to the knowledge base and enhance the ability of practitioners to address their professional responsibilities.

## Research Projects 2017-2018

### **Information Management and the Courts: An Update by John C. Montaña, JD, FIIM, FAI**

This report examines and analyzes US Court decision on information management in the four areas of:

- Data Breaches and Liability
- E-discovery and Spoliation
- Records and information policies and procedures
- Data rights

Advances in information technology have outpaced the ability of the legal system to keep pace, and advance legal doctrine that address technology issues. This presents Courts with novel fact patterns that are rarely litigated, or are in many cases questions of first impression. In other cases, governing statutes and case law are outdated, vague or conflicting.

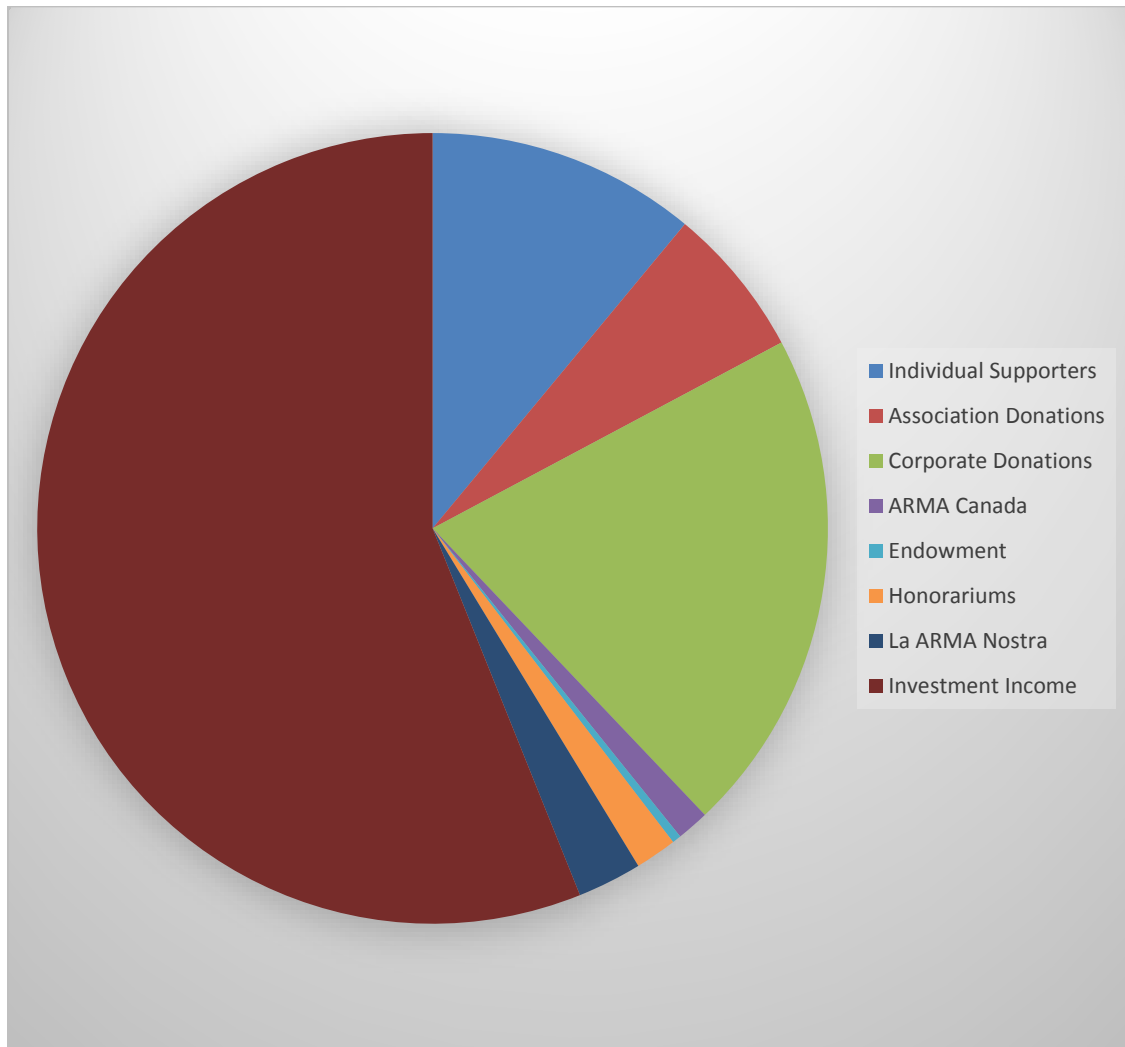
The paper focuses on cases from approximately 2000 to 2018, with older cases cited primarily as background for discussion of newer cases and topics.

### **Records Management Experience With Big Bucket Retention: A Status Report by William Saffady, Ph.D, FAI**

This report examines the current status of big bucket retention, a widely discussed approach to lifecycle management of recorded information that groups related records in broad categories with uniform retention guidance.

The report explains big bucket retention concepts followed by a survey of records management publications, web sites, and other sources that document historical development of these schedules and discuss their advantages and limitations. The report also presents findings from interviews with experienced records management professionals who have developed big bucket schedules in government agencies, companies, and not-for-profit organizations.

# Financial Picture



Where does support for the Foundation come from

|                       |                 |
|-----------------------|-----------------|
| Individual Supporters | \$9,405         |
| Association Donations | \$5,285         |
| Corporate Donations   | \$17,666        |
| ARMA Canada           | \$1,127         |
| Endowment             | \$310           |
| Honorariums           | \$1,450         |
| La ARMA Nostra        | \$2,245         |
| Investment Income     | \$47,869        |
| <b>Total</b>          | <b>\$85,357</b> |



# Board of Trustees

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www.armaedfoundation.org  
Email: Admin@ArmaEdFoundation.org  
ARMA International Educational Foundation  
P.O. Box 68, Palmyra, NJ 08065, USA