



September 2004

Volume 1, Issue 1

### President's Message

Dear Members and Friends,

First of all, I would like to thank you, our members, for electing me to serve as your 2004-2005 ARMA SA Chapter President. I hope that all of you had an exciting and safe summer. Now that the kids are back at school and eager to learn more, it is also the time for all of us to start thinking about our own education as well.

While you were vacationing, the new Board of Directors was hard at work, planning educational programs for the coming year. And what a year we have in store for you!

Many members have requested that we allow more time for networking (information sharing) at our monthly meetings. And there is not a better way to learn how to network than to learn it from San Antonio's own Master Networker, Gene Hildabrand. On Tuesday, September 21<sup>st</sup>, Gene will show you that "Networking is NOT Just For Sales People." Gene is well known for his dynamic and enthusiastic presenting style and appears in his own weekly television show on Time Warner Cable. You won't want to miss this information sharing event! So start your

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### "The Master Networker" Gene Hildabrand



### Networking Is *NOT* Just For Salespeople!

September 21, 2004

11:00 a.m. to 1:00 p.m.

Embassy Suites Hotel

7750 Briaridge, San Antonio, TX 78230

Cost for Presentation & Lunch:

\$15.00 Members \$20.00 Non-members

Menu: Chicken Parmesan

Roasted Potatoes

Vegetable Medley

Green Salad

Chocolate Mousse

Reservation deadline: Friday, Sept. 17<sup>th</sup> @  
Noon! Seating is limited.

CALL: Linda or Gloria @ 210-498-3222

networking right now by sharing this information with co-workers, family and friends. See more details at the end of this newsletter.

In response to your requests, we have made some changes to our monthly meetings. While our meetings will still remain on the third Tuesday of each month, the format and time for our meetings has changed. Meetings will begin at 11:00am and end at 1:00pm. There will be one educational speaker presenting each month and new members may attend an orientation at 10:30 am prior to our meeting.

In response to your requests for information on Electronic Records, we have scheduled Nancy Flynn, The Email Coach™, to present a one day seminar about Email and Instant Messaging – The Risks, Rules, Rights, Responsibilities, and Records Keeping. Nancy is the author of 6 books, has appeared on national TV, written news articles for The Wall Street Journal, New York Times and US News & World Reports. Nancy Flynn also serves as a consultant to and expert witness for law firms engaged in e-mail related litigation. Mark your calendars for January 18, 2005. This is a must attend event.

That's not all! We have educational luncheon programs scheduled on Metadata, Digital Records, Policy and Procedure Writing, Sarbanes-Oxley, Identify Theft and what ISO 15489 means to Records Managers.

It's going to be an exciting year with plenty of opportunities to learn! The board looks forward to serving you and providing you with types of educational programs you have the most interests in.

Chris Jacobs

This presentation is presented in conjunction with ARMA San Antonio's monthly meeting.

“ One of the essential benefits of networking is *information sharing*. Information sharing is significantly more valuable than information “ gathering or even information giving. “

On September 21<sup>st</sup> San Antonio's own, Gene Hildabrand, will share with the members of the San Antonio Chapter of ARMA how each of us can become a Master Networker! He will share networking tips, tools, and techniques that will be invaluable in many aspects of life – work, social gatherings, community functions, etc. Gene is well known for his dynamic and enthusiastic presenting style and appears in his own weekly television show on Time Warner Cable. You won't want to miss this information sharing event!

**MUST BE PRESENT TO WIN!!**

Come to the September 21, ARMA Luncheon at the Embassy Suites to hear the details on winning a FREE registration to the ARMA Annual Seminar, January 18, 2005. A \$150 value!!

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## ICRM STUDY GROUP

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

**ICRM CORNER**  
By: Jenny N. Barker, CRM

CRM EXAMINATION Part 4  
Records Appraisal, Retention, Protection, and Disposition

Part 4 of the Examination covers what I consider to be the core elements of a good records management program. Records Inventory, that basic step of discovering what records you have, is addressed in this part of the exam. This is followed up with the development of retention schedules, their implementation and administration. Archives Program elements and Vital Records Program are covered as well. And, if this were not enough, Disaster Recovery programs are also addressed.

Part 4, as all parts do, requires some preparation. Both the process flow from inventory to final disposition and the interrelationship of the programs needs to be understood. Fortunately, these core records and information management programs are prime candidates for presentations,



## A Note From the Public Relations Committee

By Dora S. Martinez, CRM

It's the beginning of a new year and we look forward to working with you as our organization contributes to the betterment of our community. This year Lynn Esquivel will again be on our committee working with the Care Bear Program and the Battered Women's Shelter. We also welcome Debe Wantzloeben to our committee. Debe has graciously agreed to assist us as we expand our program to include Dress for Success.

Because of your continued generosity, we have successfully assisted the victims of violence in San Antonio. ARMA has provided thousands of Care Bears to children traumatized by violence and abuse. Our members have generously provided toiletries to the individuals assisted by the Battered Women's Shelter. We will continue our support of the Care Bear Program and the Battered Women's Shelter. This year we'd like to move one more step forward.

Many of the women assisted by the Battered Women's Shelter are diligently striving to attain their financial independence by becoming employed. Dress for Success assists these individuals through education and training. In order for these individuals to enter the professional world, they must give a professional impression to prospective employers. Dress for Success provides professional attire, business suits, shoes, and accessories for this purpose.

ARMA members can help by setting aside their gently used professional attire and business suits. We will hold a drive to collect this clothing sometime during the year. More information will be provided to you as the year progresses. Together we are making a difference in our community! Thank you!

workshops, articles and networking with fellow ARMA members. So, obtaining both textbook and real world information on these programs is relatively easy. In today's electronic information world, the role that records managers play on project teams is frequently in understanding that the principles of inventory, retention, archives, vital records and disaster recovery programs is valid in both the paper and the electronic worlds.

Part 4 of the examination consists of 100 multiple-choice questions. Each question is worth 1 point and 70 is a passing grade. The following sample questions are reprinted with the permission of the ICRM. They are part of the publication Preparing for the CRM Examination A Handbook which can be purchased only from the ICRM.

1. The function of the records inventory is to:
  - a. gather descriptive data relating to an organization's word processing systems.
  - b. collect information representing data residing on magnetic media.
  - c. gather descriptive data representing the total information resources of an organization.
  - d. survey an organization's paper work.
  - e. analyze an organization's records to determine content.
  
2. Which of the following is not a consideration in developing a records retention schedule?
  - a. The value of the records to the organization that created or uses them.
  - b. The storage medium on which the information resides.
  - c. The volume of a records series.
  - d. The degree of reference activity for a records series.
  - e. The historical value of records.
  
3. The archival term "provenance" means:
  - a. the geographical location from whence records have been accessioned into the archives.
  - b. the shelf location of archival materials.
  - c. the records should be preserved in groups that correspond to their sources of creation.
  - d. the records should be arranged as in southern France.
  - e. the records should be arranged in the order in which they were filed during their active life.

4. The first-aid measure for salvaging water-soaked film is immersion in:
  - a. cool, clear water.
  - b. photographic hardening solution.
  - c. dry-cleaning agent.
  - d. thymol.
  - e. powdered desiccant.

5. Reconstruction of vital information which had not been regularly transmitted to an external organization is known as:
  - a. off-site protection.
  - b. automatic dispersal.
  - c. on-site protection.
  - d. underground protection.
  - e. improvised dispersal.

These questions are representative of the 20 questions for Part 4 that are contained in Preparing for the CRM Examination A Handbook. The handbook also contains a complete outline of items covered by the CRM examination and a detailed bibliography of study resources. The annotated outline is now available on the ICRM web site.

Dates to remember are:

November 4-5, 2004 Dates of November Examination

May 5-6, 2005 Dates of May Exam

January 1, 2005 Postmark date for Original Applications for May Exam

March 1, 2005 Postmark date for Supplemental Applications for May Exam

May 5-6, 2005 Dates of May Exam

The Study Group is alive and well. We are working on the "Metadata – Back to the Future" presentation for the October 20, 2004 ARMA Chapter meeting. This will complete our review of metadata. The group will then decide on what area to study and which of the various study techniques we use.

**For more information call Jenny N. Barker, CRM 830-980-3348 or e-mail [BarkerCRM@cs.com](mailto:BarkerCRM@cs.com). The ICRM web site is [www.ICRM.org](http://www.ICRM.org) PS. c,c,c,a,b!**

**In Memory of  
THOMAS E. PAWEL  
1925 – 2004**

One of ARMA San Antonio longtime members, Thomas Ernst Pawel, died on Sunday, August 22, after suffering a brain hemorrhage at home. He was 78.

Tom was president of Concord Oil Company, which he founded in 1956 in San Antonio. By all accounts, he leaves behind a legacy of generosity in every aspect of his life.

We visited with him last at our Christmas luncheon in 2002 when he told us wonderful stories of his German heritage. He was a delightful and humble man who will be missed by all those who knew him.

Our deepest sympathy goes to his wife, Nancy, and their entire family. On behalf of the entire Chapter, a memorial in his name was sent to Boysville, Treehouse Day Program for Autistic Children, and Texas Research Park Foundation.

**What Does It Mean To Be President of  
ARMA San Antonio?**

As President of ARMA San Antonio, I am responsible for calling and presiding over all meetings of the Chapter and Board of Directors. I have the duty and responsibility to exercise general supervision over the activities and welfare of the Chapter and maintain open communication with the members of the Chapter Board of Directors and ARMA relative to Chapter activities. As Chapter President, I also serve as the Chapter's liaison to the Member Services Department at ARMA Headquarters. I appoint all chairpersons of standing and special committees, subject to the approval of the Board of Directors, and serve as an ex-official member of each committee.

I am here to serve you as ARMA San Antonio Chapter Members and invite you to e-mail or call me anytime.

Chris Jacobs  
[cjacobs@sacu.com](mailto:cjacobs@sacu.com)  
210-258-1263

**Scholarship  
Winner**

**S.A. ARMA SCHOLARSHIPS A BLESSING**

My name is Nick Oudie and I am one of many beneficiaries of the S.A. ARMA scholarship. This past July, I was able to attend the ARMA Southwest Regional Leadership conference in Midland with a scholarship from the S.A. Chapter of ARMA. As treasurer of our chapter, the conference was beneficial in that it provided me with the tools necessary to perform my duties in a professional manner.

I learned that ARMA International provides a special web site for board members. Through the web site, I can access all the rules and regulations for treasurers, related links, and the names of people at International that can help me if I have any questions. I was also able to help first-year treasurers (this is my second term) from other chapters by answering questions they had about policies, procedures, and best practices. I was in their shoes last year, and it helps to have someone experienced to lean on.

Another benefit was the networking opportunities. Some of our chapter's successes began with ideas shared by peers at the regional conference. What I learned the most is that S.A. ARMA has a dedicated team who is willing to go the extra mile to make our chapter a success.

Thank you S.A. ARMA for helping me expand my horizon.

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## ARMA INTERNATIONAL'S VISIBLE FUTURE

### Where Are We Now and Where Are We Going?

At the ARMA Southwest Regional Leadership Conference, the San Antonio Board was challenged to not only begin “thinking” strategically, but also to begin “planning” strategically in our local Chapters. Setting a direction for the Chapter as well as determining priorities are important objectives of your ARMA Board. We should focus our energies and initiatives to embrace the strategic priorities communicated by ARMA International. Some of those presented to us were:

- Promote visibility of RIM profession among professionals, global business community, and public policy decision makers
- Create awareness & understanding of RIM throughout all levels of ARMA and within the profession
- Provide access to education and information for professionals
- Impact the RIM industry & profession through participation in trends, products, best practices, standards
- Facilitate the exchange of profession-specific information
- Facilitate participation in & support of the association's infrastructure (e.g., more volunteers)

In response to the fact that e-records is considered by members and organizations to be one of the biggest challenges RIM professionals face in business today, an e-records research initiative was sponsored by ARMA International. They chose the Forrester Group to conduct research and their findings are published on the ARMA.ORG web site.

[http://www.arma.org/pdf/governance/ForresterERecords\\_print.pdf](http://www.arma.org/pdf/governance/ForresterERecords_print.pdf)

I urge you to read this and reflect on what part we, as an ARMA Chapter, and you, as a records management professional, can play to strengthen our profession and your career.

Volunteering your time to promote our educational events and scholarships, attending our monthly training luncheons, participating in the ARMA webinars, networking with other record management professionals—these are but a few ways to put your strategy into action.

### MARK YOUR CALENDARS

Tuesday, January 18, 2005  
San Antonio ARMA Annual Seminar

#### E-Mail Risks, Rules & Regulations

Presented by:  
Nancy Flynn, The eMail Coach™

Author of 4 books—her titles include *E-Mail Rules*, *Instant Messaging Rules*, *The ePolicy Handbook* and *Writing Effective e-Mail*. A noted e-mail expert, she has been featured by *The Wall Street Journal*, *Fortune*, *US News & World Report*, *New York Times*, *CNBC*, *CNN*, *NPR*, *CBS MarketWatch* and *BBC Radio* among others.

Keep watching for more details!

### ARMA MEMBER RESOURCE PAGE

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**WEB SITE ADDRESSES**

ARMA International  
[www.arma.org](http://www.arma.org)

Southwest Region  
[www.armsouthwest.org](http://www.armsouthwest.org)

San Antonio Chapter  
[www.armsanantonio.org](http://www.armsanantonio.org)

**Editor's Notes**

Your ad ~~could have~~ should have appeared here  
And it still can.... contact the editor(s) for information  
regarding advertising in this newsletter. Your business card  
can be scanned and included in this newsletter or you may  
submit an item saved in a standard graphic file such as  
BMP, GIF or JPEG. If you prefer, we can "capture"  
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the newsletter with a link back to your web site or email  
address. If you have previously advertised in this newsletter  
and don't see your ad, is your account up to date?

Isabel Carreon  
[Isabel.Carreon@valero.com](mailto:Isabel.Carreon@valero.com)

Billy Pitts  
[billy.pitts@tabs.toshiba.com](mailto:billy.pitts@tabs.toshiba.com)



P.O. Box 830660  
San Antonio TX 78283-0660

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publication, contact the editor(s)

Isabel Carreon  
Valero Energy Corporation  
P.O. Box 696000  
San Antonio TX 78269-6000  
VOX: (210) 345-4711 FAX: (210) 345-2427  
[Isabel.Carreon@valero.com](mailto:Isabel.Carreon@valero.com)

Billy Pitts  
Office Communications Systems  
OFFICE: (210) 357-2600 FAX: (210) 357-2665  
[billy.pitts@tabs.toshiba.com](mailto:billy.pitts@tabs.toshiba.com)

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## ARMA San Antonio Chapter 2004-2005 Calendar of Events

<b>Date</b>	<b>Event</b>	<b>Time</b>	<b>Topic</b>	<b>Presenter</b>	<b>Location</b>
Sept. 21, 2004	Educational Luncheon Program	11:00 a.m. to 1:00 p.m.	“Networking is <b>NOT</b> Just for Salespeople!	The Master Networker, Gene Hildabrand	Embassy Suites 7750 Briaridge SA 78230
Oct. 19, 2004	Educational Luncheon Program	11:00 a.m. to 1:00 p.m.	TBD	TBD	Embassy Suites 7750 Briaridge SA 78230
Nov. 16, 2004	Educational Luncheon Program	11:00 a.m. to 1:00 p.m.	“Born Digital” Electronic Records	TBA	Embassy Suites 7750 Briaridge SA 78230
Dec. 21, 2004	Educational Luncheon Program	11:00 a.m. to 1:00 p.m.	TBA	TBA	Sonterra Country Club
Jan. 18, 2005	Seminar	TBA	Email and Instant Messaging -Risks, Rules, Rights, Responsibilities, Records	Nancy Flynn	Embassy Suites 7750 Briaridge SA 78230
Feb. 15, 2005	Educational Luncheon Program	11:00 a.m. to 1:00 p.m.	Policy & Procedures Writing	TBA	Embassy Suites 7750 Briaridge SA 78230
Feb. 18-19, 2005	CRM Conference				Corpus Christi
Mar. 15, 2005	Educational Luncheon Program	11:00 a.m. to 1:00 p.m.	Sarbanes-Oxley	TBA	Embassy Suites 7750 Briaridge SA 78230
April	RIMS Month				Bexar Co. Court House
April 17, 2005	Shred Day	9:00am to Noon			TBA
April 19, 2005	Educational Luncheon Program	11:00 a.m. to 1:00 p.m.	Identify Theft “Is There Another You?”	TBA	Embassy Suites 7750 Briaridge SA 78230
May	Swing and “Bear” It Golf Outing	TBA	Golf Fundraiser for SAPD Carebear		TBA
May 17, 2005	Educational Luncheon Program	11:00 a.m. to 1:00 p.m.	What does ISO 15489 Mean to Records Managers	TBA	Embassy Suites 7750 Briaridge SA 78230
June 21, 2005	Awards Luncheon Program	11:00 a.m. to 1:00 p.m.			Sonterra Country Club