



# SOUNDINGS

## January Chapter Meeting Notice

### Navigating the ECM Waters – Making Progress in the Face of Challenges and Storms

#### Program Description:

Every good sailor can tell a tale or two about harrowing trips or a once in a lifetime adventure. Similarly, most of us in the Records and Information Management profession have an electronic records story or two – some are happy tales while others are stories of survival.

Please join us for our January 11<sup>th</sup> meeting as Kyle Stannert discusses some of the pitfalls, successes, and most importantly lessons learned that he has experienced on his ECM journey. Kyle will weave these stories together with best practices in order to help make your journey a little smoother. Whether you are still in the harbor and planning your journey, or feel stuck in the rocks, there will be something to take away as you navigate back to the office.

(Check out page 2 for Kyle’s bio.)

Click [here](#) to register for this event.

Puget Sound Chapter of  
ARMA International  
**January 11, 2012**

#### Location

TPU, Tacoma, WA

(See website for address and directions)

11:00 am - 11:30 am Registration

11:00 am - 12:00 pm Lunch

12:00 pm - 1:00 pm Program

Lunch and Program:

\$11.50 (before 1/06/12)

\$16.50 (after 1/06/12)

Main Menu: Panera Bread Boxed

Lunches w/ Potato Chips and a

Cookie

Alternate: N/A

Check out the Puget Sound Website:

[www.pugetsoundarma.com](http://www.pugetsoundarma.com)

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*Chartered September 10, 1976*

*Celebrating 35 years of International Association*



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## President's Message

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Happy New Year to you all! I hope you all had the most joyous of holiday seasons. I'm writing this message as I get ready to take a few days off from work to finish my shopping, do some baking, and enjoy the holidays with my family. I hope you found the time to not only take care of the long lists of things to do during this busy season, but also to take care of yourself a bit.

2012 will be a great year of training and networking opportunities for you, our valued chapter members. Barb Werelius, our Program Chair, and Bob Dalton, have worked hard to bring our chapter members a diverse and interesting slate of programs in 2012. I know many of you are planning your training for the year and I hope you consider participating in some of the options we will be offering you. Here is a preview of what we have planned for the next few months (*some may be subject to change*) -

- ✓ January 11 – lunchtime meeting in Tacoma on ECMS
- ✓ January MER Session of the Month - Applying Retention Schedules Successfully - to Both Paper and Electronically Stored Information (ESI)
- ✓ February 8 – lunchtime meeting in Tacoma on RM Governance
- ✓ February MER Session of the Month - What's the Use? Managing Records of Social Media
- ✓ March 12 - 13 – Region Conference in Boise (*no chapter meeting in March*)
- ✓ March MER Session of the Month - Case Study: Converting Enterprise-wide to Digital Records - Bank of America's Experience

I wish you all the best in the new year!

Eileen Harke, CRM

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## Meeting Location Information

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Address: 3628 S 35th St, Tacoma, WA 98409

Directions and parking lot map can be found [here](#) (the arrows show you where the entrances are to each lot).

If parking in Lots B2 or C the nearest entrance is the main lobby entrance. From lots A1, A2 or G there is a public entrance at the west end of the building (at the entrance of lot A1); attendees should head through both doors, straight down the hall to find the main lobby. From lots D or F, attendees can stop at the guard house (at the east end of the building) and request admittance and directions to the Auditorium.

Regardless of which entrance attendees use, they should ask for directions to the auditorium. The locations the chapter is using for these meetings are publicly accessible.

Please Note: the directions on the map tell you to head south on Union Ave.; that's a left turn off the exit (for those of us who aren't always sure which way is north, etc.). Also, the Union Ave. exit has two lanes; you'll need to be in the left lane to take a left turn onto Union.

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## About the Speaker

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Kyle entered the field of records management after attending the Western Washington University Archives and Records Management Program. During his studies at Western he completed an internship at the University of Washington, and later began employment at the federal, county, and local government level.

Kyle has served as the Public Records Manager at the City of Bellevue for over 4 years, where his team is responsible for ECM system implementation, assisting

the public and City staff through the requirements of the Public Records Act and a broad range of records management questions.

Before becoming a records manager, he spent his summers floating in the Bering Sea as a commercial fisherman making him qualified to tell a good sea story or two, but is happy to have landed in the records world so he can spend his evenings and weekends with his wife and two daughters (ages 6 and 3).

## Government Agency RM Updates

By: Leslie Koziara, CRM

Happy New Year! This is the time of year that many reflect on the past, and look forward to the future. Many people make resolutions to improve and commit to positive changes. Giving up smoking, exercising more, incorporating healthier choices to our lifestyle, and being kind to others are some of the more common resolutions made.

Take advantage of a new year and make some records management resolutions! Here are some suggestions:

- Give up bad filing habits and lose the weight of clutter and duplication
- Routinely exercise retention and disposition
- Implement a healthier records management program - “go lean”
- And be kind to others, educate them on the importance of good recordkeeping

These records management resolutions can benefit your agency in several ways. By exercising retention and disposition, you will automatically lose the weight of the volume of clutter and duplication, and save time and energy in storage and maintenance costs. By eliminating the volume of records that have met retention but are still being stored either in a file drawer or still lingering in agency servers, you cut down on the time and money it takes for disclosure and discovery. By applying defensible disposition and getting rid of the clutter you are not required to keep you can help protect the agency in the event of any potential legal entanglements.

As agencies are forced to tighten their belts even further, they often overlook how a solid RM program can improve an agency’s waistline. By utilizing records management practices, an agency can “go lean”, increase productivity and make the best use of resources.

Look for ways to improve and streamline business processes for more efficient government. Often an agency can pare costs and promote effective measures in simply reviewing their processes. Eliminating duplication and redundant processes save staff time and effort in doing their job, which in turn saves money. Take a look at how many staff resources it takes for a certain process, and use records management to streamline ways of doing things.

It is vital that an agency protects their records for their entire lifecycle. Further ensure the wellness of agency records and

take advantage of transferring archival records to the Washington State Archives. There are no costs for transferring archival records, and it ensures those records will have a long healthy life for the future!

Resolutions can be tough to keep. It takes a certain resolve to keep exercising and making healthier choices. It is easy to become discouraged when something happens to knock you off course. Washington State Archives is here to offer encouragement and assistance to help you keep those records management resolutions!

Wishing everyone the best in the New Year!



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Information Solutions Consultant

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## VENDOR OF THE MONTH - JANUARY, 2012

Member: Tim Arndt

## POLYGON GROUP

Seattle District Office  
301 30th St. NE. Suite 118  
Auburn, WA 92800  
253-326-0254  
800-I-CAN-DRY

On October 1, 2010, the MCS (Moisture Control Services) division was separated from Munters Group and established as an independent company; one with a strong growth agenda and a dedicated focus on the property damage restoration (PDR) and temporary humidity control (THC) markets.

### Response, Reliability and Results

Polygon is a customer centric organization dedicated to delivering right first time solutions for the prevention and mitigation of fire, water and the effects of humidity.

A new Puget Sound Chapter Member, Tim Arndt, will tell us more about Polygon services at the beginning of the January meeting.

## Job Blog

By: Robert Dalton, CRM

NW Region ARMA Job Blog - Job Opportunities!

Check out the latest employment opportunities on ARMA Jobs NW web page at <http://armajobsnw.blogspot.com/>.

If you are aware of a RIM job opportunity, please contact Bob Dalton at [daltonconsulting@hotmail.com](mailto:daltonconsulting@hotmail.com) or telephone 253-229-4555. Please provide a copy of the job opportunity advertisement and/or a web site where the document can be copied.

This blog is maintained in conjunction with other Great NW Region Chapters and is a great way to keep up on open positions within the RIM community. The job blog can also be set up as a RSS feed that will alert you of any new positions available in the NW region.

## Toner Recycling

Donate your Inkjet and Laser Printer Cartridges

Here's an easy way to help save our environment. One of our ongoing chapter projects is the donation of used inkjet and laser printer cartridges by the membership that can be turned into cash to support the chapter programs.

Did you know:

- Over 350 million cartridges are thrown into US landfills every year.
- Each cartridge takes 450 years to decompose.
- Every recycled cartridge can save nearly 3 ½ lbs. of unnecessary waste dumped into our landfills.

The chapter turns in the cartridges to a recycler who then refills the cartridges for resale.

Bring your inkjet and laser printer cartridges to the monthly meeting and drop them in the recycling box.

Thanks for your support in this project.

If you have any questions please contact Bob Dalton at [daltonconsulting@hotmail.com](mailto:daltonconsulting@hotmail.com).

## Message from the GNW Region Manager

By: Marc Simpson

A new year has arrived. While it is a nice time to reflect back on last year, this year I am looking forward in anticipation of things to come. One thing is certain, 2012 will bring changes. I used to hate change, but as I've grown older, I've learned to embrace it. For many years I was a pilot and a flight instructor. I owned an airplane, flew aerobatics and even did an airshow or two. I was also a professional printer for over twenty years. And once upon a time I was a big collector of baseball cards. But life changed and one by one all of those phases of my life came to an end. Sometimes leaving things behind is difficult, but over time, I have come to realize that had they not, I may never have discovered my passion for genealogy and history. I also would not have become a records manager, discovered ARMA, and made so many wonderful friends. Change is good.

January signals future changes in ARMA. It is time to elect the officers and directors of the Board for 2012-2013. On or about January 9<sup>th</sup>, notification of e-voting will be sent to all members in good standing. Please take the time to read the candidate's bios and positions on the questions put forth by the Elections Management Task Force. You might also want to watch the video of the Candidate's Forum that was held at the Conference in Washington D.C. back in October. The link to that is <http://www.arma.org/myarma/governance/election.cfm>.

I learned this year that the process just to become a candidate on the

ballot is not an easy one. It requires a great deal of thought and not a small effort. Only serious candidates would run that gauntlet. One of my friends and I agreed that sitting on that stage in the Candidate's Forum felt a bit like sitting before a firing squad. I can assure you the candidates this year are all seriously dedicated to our association and would greatly appreciate you taking the time to vote. So let your voice be heard! Vote! The deadline for returned ballots is January 27<sup>th</sup>.

We can't remind you all of this enough. If you haven't already, write this on your calendar! The 2012 Conference of the Great Northwest Region will be March 12th-13th in The City of Trees, Boise, Idaho. I have attended many region conferences in my years in ARMA, and I have to say this one will be our best ever. For more details, visit our website at [www.armagreatnorthwest.org](http://www.armagreatnorthwest.org)

I'm getting excited for the 2012 Leadership Conference! This year the Columbia Basin Chapter will be our hosts. The venue has been chosen and it is spectacular. Can you say river view? Start making plans to join us in Richland June 8-9<sup>th</sup> now!

Calling all Ye Pirates! Avast Ye Mateys! We are once again applying for entry into the Portland Rose Festival's Starlight Parade scheduled for June 2, 2012 in Portland. Sponsored in 2011 by the Oregon Chapter, our participation was not only a great promotion for ARMA, but it also earned Project of the Year honors for the Oregon Chapter in

Washington D.C. This year our merry band of scallywags (which last year included pirates from ARMA's Board and HQ, the GNW Region, the Oregon, Bellevue/Eastside and Columbia Basin Chapters, and Iron Mountain) is looking to grow! So keep yer ears open for the scuttlebutt.

Another change that is coming to the Great Northwest Region is a change in the Region Leadership. This is my last year as Region Manager. This is not an elected position, but one that is appointed. For more information on the required qualifications, duties, and application process go to <http://www.arma.org/myarma/forms/committees/applicationRegion.cfm?ID=Reg>.

2012 will certainly bring change and, personally, I am excited to see all of the good things to come. I hope that the new year will bring each of you all the best.

Marc J. Simpson  
Region Manager  
Great Northwest Region

And now, time for a bit of humor...

Did you hear about the guy whose whole left side was cut off? He's all right now.

- Anonymous -



## MER Monthly Session

By: Eileen Harke, CRM

### MER Session of the Month: Applying Retention Schedules Successfully – to Both Paper and Electronically Stored Information (ESI)

Despite their best efforts, many companies haven't been able to devise retention schedules that can be applied to both their paper records and electronically-stored information (ESI). Records categories that are too broadly written can lead to unnecessary records retention, make finding specific information time-consuming, and result in higher recordkeeping and discovery costs. Conversely, retention schedules that are too detailed aren't easy to maintain or use. Having the right blend of specificity and universality isn't impossible – it just takes understanding some key considerations. This web seminar addresses:

- Integrating conflicting statutory and regulatory requirements from different jurisdictions in ways that address different organizations' unique cultures and needs.
- Learning when to limit the number of different retention time periods.

- Recognizing different options to handle “event-based” retention periods.
- Incorporating helpful tools so that employees can easily find the retention periods that apply to their most frequently used records.
- Balancing IT's seemingly contradictory needs: Fewer retention periods that can be applied to broader groups of records and sufficiently detailed retention specifications that can be applied to specific tables of data within large, integrated business systems.

My ARMA Information – this session from the MER Conference is brought to you through ARMA International's *Session of the Month* partnership. To access the webinar, find the “My ARMA” page on ARMA's website, sign-in, and under the “Chapter Memberships” section you will find the Session of the Month link which is only available for one month.

## Chapter Library

By: Bob Dalton, CRM



Check Me Out!  
Really!  
Check Me Out

2011 additions to our chapter library. Check them out:

- **Implications of Web-Based Collaborative Technologies in Records Management, 2011, ARMA International**
- **Mergers, Acquisitions, Divestitures and Closures - Records & Information Management Checklists, 2011, Phillips, John T**
- **Records and Information Management - Fundamentals of Professional Practice, 2nd Ed., 2011, Saffady, William., PhD**
- **Records Center Operations, 3rd Edition - ARMA TR 01-2011, 2011, ARMA International**
- **Social Networks and Their Impact on Records Management, 2011, Shreck, Helen**

Our recent acquisitions will be at the library display table at the monthly meeting. Look them over and check them out.

An Index of our current holdings will also be available at the display table for your convenience and on the Chapter Website [www.pugetsoundarma.org](http://www.pugetsoundarma.org), then click the Members Lounge, sign in and open the Library tab.

**Remember**, you too can recommend books for purchase by the chapter. We only ask that the books relate to records and information management. Send your recommendations to Bob at the telephone number or email address shown below.

The records and information management publications are available for purchase through the ARMA Bookstore (<http://www.arma.org/bookstore/Search.cfm>) and maybe also be available as a PDF download through the bookstore.

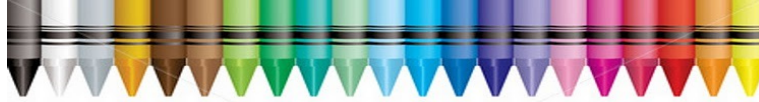
To reserve a book or check out any books or articles in our chapter library please Bob Dalton, (253) 229-4555 or [daltonconsulting@hotmail.com](mailto:daltonconsulting@hotmail.com).

Happy reading.....



## Puget Sound Chapter of ARMA

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## Box Tops for Education

Chapter Member and Board Member, Laurie Ulrich has stepped up to chair our chapter's efforts to support students in our local area who need our assistance to get them ready for school. We will still collect school supplies at our meetings, but there is another way we can support our local school districts.

We are asking as you are out shopping for your family dinners, to consider purchasing products that contain a Box Tops for Education coupon or Labels for Education UPC. The Box Tops have a monetary value and the Labels for Education have a point value.

Laurie will be collecting these Box Tops and Campbell's soup labels on a monthly basis. To see a complete listing of products that participate in this program, you can go to [www.boxtops4education.com](http://www.boxtops4education.com) and [www.labelsforeducation.com](http://www.labelsforeducation.com).

Every little bit helps these children in need. Please contact Laurie Ulrich with any questions.

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