

**ARMA**  
**The Frankfort – Bluegrass Chapter**



**“Race To The Finish”**

*The Frankfort – Bluegrass Chapter*  
Continues to

Build Strategic Partnerships for Success by  
Integrating Records Management Functionality  
into New Technologies

**Small Chapter of the Year  
Award Submission  
June 2005**

ARMA International

**Chapter Verification Certificate**

I hereby certify that I have reviewed the enclosed Chapter of the Year Award submission and that the information submitted herewith is a true representation of the Chapter activities and achievements for the period of July 1, 2004 through June 30, 2005.

**Chapter**                    Frankfort – Bluegrass ARMA Chapter

**Name (Print)**            Lisa D. Wilson

**Title**                        President

**Signature**                \_\_\_\_\_

**Date**                        May 27, 2005

**Frankfort – Bluegrass ARMA Chapter  
2004 – 2005 Chapter of the Year Award Submission**

**Table of Contents**

Summary of the Chapters Year

Introduction: Chapter Characteristics

Section I – Educational/Professional Development

- ◆ Executive Summary
- ◆ Chapter Educational Opportunities: Meetings, Seminars
- ◆ Chapter Strategic Plan Updates/Board of Directors Meetings
- ◆ Chapter members Participation in other ARMA Educational opportunities: ARMA International Conference, Chapter Seminars
- ◆ Chapter acquired proclamation from the Governor of Kentucky proclaiming the month of April as Records and Information Month
- ◆ Chapter acquired proclamation from the Mayor of the City of Lexington proclaiming the month of April as Records and Information Month
- ◆ Chapter acquired proclamation from the Mayor of the City of Richmond proclaiming the month of April as Records and Information Month
- ◆ Chapter acquired proclamation from the Mayor of the City of Frankfort proclaiming the month of April as Records and Information Month

Section II – Projects

- ◆ Executive Summary
- ◆ Awarded the first Orville F. Boes Scholarship
- ◆ Donation to Red Cross (Tsunami Relief) and to a family in need
- ◆ Recruitment Drives including regional workshop mailing, which resulted in increased meeting attendance
- ◆ Monthly Meetings posted in the local newspapers Business Monday section
- ◆ Monthly meeting notices distributed via electronic mail
- ◆ Maintenance of the Chapter Newsletter
- ◆ Alternate meeting locations

## **Table of Contents (Continued)**

### Section III – Public Relations

- ◆ Executive Summary
- ◆ Chapter Newsletter
- ◆ Spring Seminars Regional Mailings
- ◆ Chapter Webpage linked to ARMA International website
- ◆ Distribution of Chapter FAQ pamphlet

### Section IV – Chapter Maintenance

- ◆ Executive Summary
- ◆ Chapter Membership
- ◆ Chapter Membership Participation
- ◆ Member Recognition
- ◆ Organization of Chapter Records / Previous chapter files indexed and stored with our chapter Librarian at Kentucky Underground Storage, Inc.
- ◆ Chapter added to the Library and circulated new publications among members
- ◆ Electronic Library of Chapter Documents and Newsletters maintained

### Section V – Outside Activities – Chapter Members

- ◆ Several Members of Local Chapter involved in ARMA Internationals Industry Specific Groups
- ◆ Chapter Member is Chair/Project Leader for ARMA International Standards Development Committee on Records Management in Litigation Support Standard and Guideline Development
- ◆ Chapter Member is on the ARMA International San Antonio 2006 International Conference Planning Committee
- ◆ Networking: Chapter Members speak to different groups in the community on Records Management and other ARMA Chapters
- ◆ Several Members involved with AIIM (Association for Information and Image Management)
- ◆ Several Members involved with KCA (Kentucky Council on Archives)

## Summary of the Chapter's Year

After winning Small Chapter of the Year in 2004, The Frankfort – Bluegrass ARMA Chapter decided at the first Board meeting to reach for the stars and continue to strive for the best that we could be. With seasoned elected officers the planning stage began. The Board's focus was to go with the success of the last year and add to that by continuing to step up the educational portion of the meetings, offer more networking opportunities, and by making our chapter visible in the state and local communities as a resource for Records and Information Managers in Kentucky.

The Board developed a plan of action to strengthen the chapters educational programs and professional development with our main goal being quality service to our members. We knew that the Chapter had to become efficient and vigorous in order to maintain our current level of membership. We offered more networking opportunities and better communication to our current and prospective members than ever before. When looking for speakers, we looked at the quality and value of the topic, verses the cost.

The chapter had a few exciting moments this past year. We awarded the first recipient of the Orville F. Boes Scholarship for the upcoming school year. Overall attendance at the monthly meetings increased due in part to the interesting and educational speakers obtained by our Vice President (Program Chair). We utilized the experience and expertise of fellow ARMA members from the Cincinnati Chapter to present our Spring Seminar along with a question and answer session comprised of CRM's from the Cincinnati, Louisville and Frankfort – Bluegrass Chapters. The chapter decided not to stop with just one seminar. We joined forces with the Kentucky Council on Archives to present a second seminar. Both seminars were not only educational, but also produced a profit for the chapter. We are excited to have a member as a CRM candidate. The chapter became involved in the community and once again was recognized by the people it touched, as an association of professionals who care. Last but not least the chapter maintained its newsletter, chapter pin, FAQ pamphlet, membership and increased monthly meeting attendance.

- ◆ Chapter awarded it's first Orville F. Boes Scholarship
- ◆ Chapter has a member that is a CRM Candidate
- ◆ Chapter acquired Proclamation from the Governor of Kentucky, proclaiming April 2005 Records and Information Management Month (**See Exhibits**)
- ◆ Chapter acquired Proclamation from the Mayor of the City of Lexington, proclaiming April 2005 Records and Information Management Month (**See Exhibits**)
- ◆ Chapter acquired Proclamation from the Mayor of the City of Richmond, proclaiming April 2005 Records and Information Management Month (**See Exhibits**)

- ◆ Chapter acquired Proclamation from the Mayor of the City of Frankfort, proclaiming April 2005 Records and Information Management Month (**See Exhibits**)
- ◆ Chapter maintained the Post Times, chapter newsletter which increased revenue for the chapter (**See Exhibits**)
- ◆ Chapter Meetings were focused on education and professional advancement
- ◆ Chapter involvement in the community – Tsunami Relief/Red Cross and a Needy Family
- ◆ Chapter made its presence known to companies in the region, by recruitment drive mailings and seminar announcements

The Members of The Frankfort – Bluegrass Chapter of ARMA are excited about this past year's accomplishments. Our theme this year – Race to the Finish “Building Strategic Partnerships for Success by Integrating Records Management Functionality into New Technologies, thus taking Records to the Next Level” seems only fitting, considering the extraordinary accomplishments of the chapter as a group. This year's accomplishments are something the entire association and local chapter can be proud of. The members of The Frankfort – Bluegrass ARMA Chapter, in light of the accomplishments outlined above, enthusiastically submit its submission for Small Chapter of the Year.

## **Introduction**

The History of The Frankfort-Bluegrass Chapter of ARMA is as follows.

On May 18, 1979, eleven interested individuals met in a conference room at the Division of Archives and Records Management in Frankfort, Kentucky to organize a local chapter. Paul Bond was selected chairman. The chapter was named The Frankfort-Bluegrass Chapter of ARMA.

A result of the May 18, 1979 meeting, committees were named, chairmen selected, and plans developed. Officers were elected at the second meeting on June 5, 1979 and the constitution was adopted. Twenty-one members signed the charter application, which was forwarded to ARMA International headquarters for approval.

The first general membership meeting was held at the Statesman Restaurant on August 15, 1979, with 30 members and guests in attendance. Mr. Gerald Hegal presented the charter and installed the officers.

It is clear that the chapters' goals and strides for professional and educational advancement are still as prevalent as ever. The world of Records and Information Management is ever changing and the Frankfort-Bluegrass Chapter of ARMA gives Records Managers in the Bluegrass Region the necessary educational opportunities to remain top-notch professionals.

The chapter also offers networking opportunities and educational meetings, which entertain an expert in the field of Records and Information Management monthly. The Frankfort-Bluegrass chapter of ARMA provides a forum for Records Management concerns. The chapter leadership works hard to meet the needs of its membership as demonstrated through the Chapters' activities in 2004 - 2005.

The history and vision of the local association is the foundation, which has given opportunities for individuals to grow professionally as leaders in and among their peers. The Frankfort-Bluegrass Chapter of ARMA currently has 25 members and an average monthly meeting attendance of 18 attendees per month.

## History of Kentucky



Kentucky was the first region west of the Allegheny Mountains to be settled by American Pioneers. James Harrod established the first permanent settlement at Harrodsburg in 1774. The following year Daniel Boone, who had explored the area in 1767, blazed the Wilderness Trail and founded Boonesboro. Politically, the Kentucky region was originally part of Virginia, but early statehood was gained in 1792. During the Civil War, as a slaveholding state with a considerable abolitionist population, Kentucky was caught in the middle of the conflict, supplying both Union and Confederate forces with thousands of troops.

In recent years, manufacturing has shown important gains, particularly in automotive assembly and parts manufacturing. Kentucky also prides itself on producing some of the nation's best tobacco, horses, and whiskey. Corn, soybeans, wheat, fruit, hogs, cattle, and dairy products are among the agricultural items produced. Among the manufactured items produced in the state are motor vehicles, furniture, aluminum ware, brooms, apparel,



lumber products, machinery, textiles, iron and steel products. Kentucky also produces significant amounts of petroleum, natural gas, fluorspar, clay, and stone. However, coal accounts for 90% of the total mineral income.



Louisville, the largest city, is famed for the Kentucky Derby at Churchill Downs.

The Bluegrass Country around Lexington is the home of some of the world's finest racehorses and home to the University of Kentucky Wildcats, SEC and NCAA Champs. Other attractions are Mammoth Cave, the George S. Patton, Jr. Military Museum at Fort Knox, and Old Ford Harrod State Park.



High Bridge, located in Wilmore, is the highest railroad bridge over navigable water, in the United States.



Kentucky's Flag, placed on a navy blue field, is the seal and words "Commonwealth of Kentucky". The two people on the seal, a pioneer and a statesman, represent all the people. They are acting out the meaning of Kentucky's motto: "United We Stand; Divided We Fall". Sprays of goldenrod extend in a half circle around the picture.

Famous Kentuckians include greats like Muhammad Ali (Boxer), Rosemary Clooney (Singer), Jefferson Davis (President of the Confederacy), Casey Jones (Locomotive engineer), Abraham Lincoln, (U.S. President), Loretta Lynn (Singer), Patricia Neal (Actress), Kevin Richardson (Singer – Backstreet Boys), Diane Sawyer (Broadcast Journalist) and many more.



Chevrolet Corvettes are manufactured in Bowling Green, KY. Toyota Camry's, and Avalon's, are produced in Georgetown, KY.



The song “Happy Birthday to You” was the creation of two Louisville sisters in 1893.

Post-It Notes are manufactured exclusively in Cynthiana. The exact number made annually of these popular notes is a trade secret.

The radio was invented by a Kentuckian named Nathan B. Stubblefield, of Murray, in 1892. It was three years before Marconi made his claim to the invention.

Middlesboro is the only city in the United States built within a meteor crater.



Mammoth Cave is the world's longest cave and was first promoted in 1816, making it the second oldest tourist, attraction, in the United States. Niagara Falls, New York, is first.

Cumberland is the only waterfall in the world, to regularly display a Moonbow. It is located just southwest of Corbin.



More than \$6 billion worth of gold is held in the underground vaults of Fort Knox. This is the largest amount of gold stored anywhere in the world.

Pike County, the world's largest producer of coal, is famous for the Hatfield-McCoy feud, an Appalachian vendetta that lasted from the Civil War to the 1890s.

As you can see, our state and its people have a lot to offer.

## **SECTION I**

### **EDUCATIONAL/PROFESSIONAL DEVELOPMENT**

#### **Executive Summary**

The Frankfort – Bluegrass Chapter of ARMA had a goal of enhancing the quality of educational programming that the chapter provides at local association meetings. This goal was accomplished by interesting monthly meetings, which featured experts in the field of Records and Information Management. The opportunity for additional professional growth and educational development was achieved by activities such as, two seminars and the Leadership Conference.

#### **Chapter Educational Opportunities**

- ◆ Chapter Meetings  
Seven Educational Chapter Meetings were held
  
- ◆ Chapter Seminars  
“Enterprise Records Management and You” Speakers: Jane Connerton, CRM, Ray Becraft and Randy Moeller. Followed by a question and answer session with a panel of CRM ‘s (Kathy Adair, Lisa Baize, Jane Connerton and Bobby Muse) from the Cincinnati, Louisville and Lexington areas.  
  
“Emerging Issues in Corporate Archives and Business Collections” Speakers: Kathy Adair, CRM, Samantha Lofton-Thompson, Deirdre A. Scaggs and Noah G. Huffman.

#### **Chapter Members’ Participation in other ARMA Educational Events**

- ◆ Participation at the ARMA International Conference
- ◆ Participation with other ARMA chapters in the Region
- ◆ Chapter Members Participation in ARMA Internationals ISG’s
- ◆ Chapter Members Participation in ARMA International at the International Level

**SECTION I**  
**EDUCATIONAL / PROFESSIONAL DEVELOPMENT**  
**Narrative**

**Chapter Educational Opportunities:**

♦ Chapter Meetings:

- 9/16/04 - **Recent Trends in Kentucky's Local Records Management**  
Presented by: Jim Cundy, Archives and Records Regional Administrator, Kentucky Department for Libraries and Archives

Jim spoke about recent trends in local government records management in Kentucky. He explained the nature of the state's Local Records Program and the positive effects it had had in localities. He noted that records management grants had been given to local officials throughout the state, and addressed issues such as record-keeping technologies and developments in the Frankfort - Bluegrass Region.

- 10/21/04 - **Electronic Records Management: A Kentucky Perspective**  
Presented by: Mark Myers, Electronic Records Archivist, Kentucky Department for Libraries and Archives ("KDLA")

Mark spoke to the chapter on the issue of the state of electronic records management in the Commonwealth of Kentucky. Mark began by discussing the organizational structure of KDLA and the outlining the nearly 30 year history of managing electronic records in state government. Mark then discussed some of the initiatives and projects that KDLA was currently working on in the field of electronic records management, most notably the formation of the Electronic Records Working Group (an interagency body made up of representatives of the records management, IT, legal and audit communities of state government.)

- 11/18/04 - **History of the Current Developments in the University of Kentucky's Archives and Records Program**  
Presented by: Nancy DeMarcus, Acting Manager, Archives and Records Program, University of Kentucky

Nancy presented a talk on the history of UK's University Archives and Records Program. She noted that the program emerged in 1937 as the Bureau of Source Materials in Higher Education, a part

of the University President's office. She concluded by noting a then upcoming reorganization of the university's library system that would include the archives and records program. As a follow-up to the talk, Nancy gave chapter members a tour of the University's Archives.

- 12/16/04 - **Christmas Party Social – Fundraiser/Auction**  
Orville F. Boes, Honorary Member, served as Auctioneer

Members donated items to auction off at our annual Christmas Fundraiser. This is a great time to spread the holiday cheer and it's a great networking opportunity.

- 1/20/05 - **Vendor Day**  
This was the chapter's vendor's day. Several members spoke about the different types of products and services they offer for the other members of the Frankfort – Bluegrass chapter. Tom Musgrave of Source Imaging discussed his company's offerings in imaging systems. Tony Crenshaw of Systems Design offered records storage and workspace design products for our consideration. Gale Reece with Kentucky Underground Storage summarized and gave details on the company's storage facilities.

- 2/17/05 - **Kentucky Housing's Records Program**  
Presented by: Donna Phillips, Records Manager, Kentucky Housing Corporation and Page Richardson, Optical Imaging Supervisor, Kentucky Housing Corporation

Donna presented a talk on the implementation of the Housing Corporation's imaging system. Donna had spearheaded the implementation of the system at the Housing Corporation. She gave the audience an account of the system implementation and plans of the future. Following her talk, The Chief Information Officer for Kentucky Housing Corporation spoke about the companies strategic information plan. Then Donna and Page gave a tour of their facilities along with a demonstration of the imaging operation.

- 3/17/05 - **Managing Email Communications as Corporate Records**  
Presented by: Timothy M. Cronin, Mobius Management Systems

Tim spoke to the chapter regarding e-mail generally and an e-mail management system Mobius offers. Tim discussed the growth in volume and importance of e-mail as a business tool. He noted the

resulting need for a system that improved efficiency and reliability; that facilitated compliance with the law; and that helped enforce records retention policies. He offered Mobius's system as one that would allow an organization to address such issues as mailbox management, capture, classification, storage, and security.

- 4/26/05 - **Enterprise Records Management and You**  
Presented by: Jane Connerton, CRM, Ray Beecraft and Randy Moeller, Proctor & Gamble ("P&G")

This was the chapter's first of two seminars this year. Jane Connerton, CRM, P&G's records manager, along with P&G's Ray Beecraft and Randy Moeller, spoke about their experiences designing and implementing the company's global records management program, its first. Their talk was followed by a questions and answer session with a panel of CRM's (Kathy Adair, Lisa Baize, Jane Connerton and Bobby Muse) from the Cincinnati, Louisville and Lexington Chapters. They addressed issues such as e-mail management, records management software programs, the importance of a business continuity plan and recent laws and regulations affecting records management.

- 5/13/05 - **Emerging Issues in Corporate Archives and Business Collections**  
Presented by: Deirdre Skaggs, University of Kentucky, Noah G. Huffman, Filson Historical Society, Kathy Adair, CRM, Records Improvement Institute and Samantha J. Lofton-Thompson, Greenebaum Doll & McDonald PLLC

This month, the chapter participated in a joint seminar with the Kentucky Council on Archives. Deirdre spoke about "The John C. Wyatt *Lexington Herald-Leader* Photograph Collection: Putting the Picture in Perspective." Noah explained how he was collecting and organizing the Tom Wallace and the Conservation Movement from 1920 – 1960. Kathy spoke on the assessment of an organization's records management program. She identified several ways to analyze the program to determine future directions. Samantha addressed records management issues facing law firms as a result of the legal process. She did this in the context of ARMA International's Standard Development initiative for a guideline on Records Management in Litigation Support. Samantha provided practical suggestions to assist the records manager in identifying necessary actions and the records manager's role in litigation.

6/17/05 - **Chapter Elections, Awards, and Final Meeting**

The final meeting of this term. Election results are announced, along with the presentation of awards to outstanding members, chapter member of the year, members with five, ten, fifteen, twenty years of services and outgoing officers. The Chapter will also award the first recipient of the Orville F. Boes Scholarship for use in the upcoming school year. A representative from the University of Kentucky Evening and Weekend College will be on hand to discuss the Universities admission of future chapter scholarships.

**Chapter Seminars:**

The April Seminar was titled: "Enterprise Records Management and You." Presented by: Jane Connerton, CRM, Ray Beecraft and Randy Moeller all from Proctor & Gamble.

The May Seminar was titled: "Emerging Issues in Corporate Archives and Business Collections." Presented by: Deirdre Skaggs, University of Kentucky, Noah G. Huffman, Filson Historical Society, Kathy Adair, CRM, Records Improvement Institute and Samantha J. Lofton-Thompson, Greenebaum Doll & McDonald PLLC

**Chapter Members' participation in other ARMA Educational Events:**

Two members attended the ARMA International Conference held in Long Beach, California.

The Chapter also promotes ISG membership and the benefits of belong to an ISG. Several of the Chapter members belonging to an ISG. Chapter member attended the pre-conference ISG Seminar.

The Chapter, through the monthly meetings and the *Post Times*, encourages members to attend seminars and conferences offered by ARMA International.

The Chapters' Immediate Past President is the Chair/Project Leader for ARMA International Standards Development Committee on Records Management in Litigation Support Standard and Guideline Development.

The Chapters' Immediate Past President is a member of the 2006 ARMA International Annual Conference Program Committee.

The Chapter's Immediate Past President attended Board Meeting of Region Medium Size Chapter to discuss their initiative to submit for Medium Chapter of the Year.

Several chapter members have attended other ARMA chapter meetings (Louisville and Cincinnati).

## **SECTION II PROJECTS Executive Summary**

The projects of The Frankfort – Bluegrass ARMA Chapter were a combination of annual giving events and new traditions for the Chapter. The members of the chapter enthusiastically took on the task of giving to the community. The chapter as a team was able to implement program goals as outlined in board meetings. As a result of the Chapters leadership and team approach, the chapter had a very successful year of which each member is proud.

### **Orville F. Boes Scholarship:**

- ◆ Awarded the first Orville F. Boes Scholarship

### **Community Out Reach Programs:**

- ◆ Donation to the Red Cross for Tsunami Relief Efforts
- ◆ Donations to a needy family through Kentucky Housing Corporation

### **Making the Local Chapter of ARMA Visible as a resource for Information Management Professionals:**

- ◆ Recruitment Drives, which included a regional seminar mailing, resulting in increased meeting attendance and chapter membership
- ◆ Monthly Meetings Posted in the local newspapers' Business Monday section
- ◆ Monthly meeting notice distributed via electronic mail

### **Maintained the chapter's ability to disseminate vital information to its members:**

- ◆ Maintenance of the Chapter Newsletter
- ◆ Maintenance of the Chapter FAQ Pamphlet

### **Preservation of Chapter Data:**

- ◆ Chapter files maintained electronically for the use of future leadership

## **SECTION II PROJECTS Narrative**

### **Orville F. Boes Scholarship:**

The Orville F. Boes Scholarship was created in honor of one of our chapter members due to his dedication to the field of records management. Orville is a retired professor from Berea College where he taught classes on records management. He currently serves as the chapter's internal auditor. Orville still remains an active member of the chapter in spite of failing health problems. The scholarship provides funds to applicants that are seeking degrees in records and information management related fields.

We will present Samantha J. Lofton-Thompson, a current member of the chapter, with the first Orville F. Boes Scholarship at our June meeting. Samantha is the firm-wide records manager for Greenebaum, Doll, and McDonald, PLLC Law Firm, with offices located in Lexington, Frankfort, Louisville, Covington Kentucky, Cincinnati Ohio, Atlanta Georgia, Nashville Tennessee and Washington D.C. She is currently pursuing a bachelor's degree from the University of Kentucky.

### **Community Out Reach Programs:**

The Chapter made a donation to the Red Cross to assist in the Tsunami Relief efforts. We also worked with the Kentucky Housing Corporation and made a monetary donation to a family in need. The monetary donation was used to help with escalating medical bills and to help with the relocation of living arrangements for a family of three.

### **Making the Local Chapter of ARMA Visible as a Source for Information Management Professionals:**

The chapter was made visible to all companies that were listed with the Better Business Bureau with recruitment drive mailings. The mailings went to Records Managers and Office Managers to promote the Association as a viable source of expertise in the field of Records and Information Management. As a result of these mailings chapter membership numbers were maintained and several guests attended monthly meetings.

The chapter's electronic mailing list was enhanced and meeting notices were sent out, not only to chapter members, but also perspective chapter members. Announcements were also placed monthly in the Lexington Herald Leader's Business Monday.

**Enhancement of the chapter's ability to disseminate vital information to its members:**

This goal was accomplished by the successful maintenance of the Newsletter. The Newsletter featured interesting educational articles, chapter and national news, as well as providing meeting notices and an opportunity for career networking through job postings.

The Facts, Answers, Questions pamphlet ("FAQ") was revised and distributed to each quest at chapter meetings. Pamphlets were also given to vendors. The vendors were asked to distribute the pamphlets to their clients that were non-ARMA members as a recruiting effort. Due to this recruiting effort, we have had several people attend meetings as a guest.

**Preservation of Chapter Data:**

Indexing and categorizing previous president and current president files and submitting them to the Chapters Librarian for storage at Kentucky Underground Storage, Inc. accomplished this goal. The Chapters electronic records were preserved and saved to a CD to eliminate the need for new officers and Board members to re-create documents for the chapter.

## **SECTION III PUBLIC RELATIONS Executive Summary**

The association year of 2004 – 2005 gave chapter leadership the opportunity to reach goals by enhancing the fundamentals of the chapter and then disseminating that information through the chapters Public Relations. The chapter newsletter gave the chapter and the international association additional exposure in the community. The Chapter received proclamations from the Governor of Kentucky, Mayor of the City of Lexington, Mayor of the City of Richmond and the Mayor of the City of Frankfort, which helped to promote Records and Information Management Month. The chapter received an overwhelming response from new individuals inquiring about the association due to public relations.

### **Records and Information Management Month:**

- ◆ Proclamation received from the Governor of Kentucky, Proclaiming April Records and Information Management Month
- ◆ Proclamation received from the Mayor of Lexington, Proclaiming April Records and Information Management Month
- ◆ Proclamation received from the Mayor of Richmond, Proclaiming April Records and Information Management Month
- ◆ Proclamation received from the Mayor of Frankfort, Proclaiming April Records and Information Management Month
- ◆ Tour of East Kentucky Power Cooperative Records Facilities in April, for Records and Information Management Month

### **Chapter Newsletter:**

- ◆ Maintained four years consecutively, after being in dormancy for several years

### **Seminars and Recruitment Drives:**

- ◆ The chapter promoted the association by large recruitment drive mailings
- ◆ The chapter promoted its two seminars, by mailing a brochure and by mailing an additional flier about the seminars, which reminded professionals in the region about the upcoming event

### **Distribution of Chapter Information:**

- ◆ Distribution of Chapter FAQ Pamphlet (**See Exhibits**)
- ◆ Meeting announcements published in local newspaper

## **SECTION III PUBLIC RELATIONS Narrative**

### **Records and Information Management Month (“RIMM”):**

The Chapter made use of the RIMM handbook to prepare for Records and Information Management Month 2005. The chapter used the materials and as a result of the chapter's efforts, Proclamations were received from the Governor of Kentucky, Mayor of the City of Frankfort, Mayor of the City of Lexington and Mayor of the City of Richmond, Proclaiming April Records and Information Management Month.

Several chapter members, within their own organizations, promoted RIMM. Chapter members made announcements about the proclamations the chapter secured, as well as, hosted tours of their facilities in efforts to increase Records Management awareness.

### **Chapter Newsletter:**

The Newsletter, of The Frankfort – Bluegrass ARMA Chapter, was maintained for its fourth consecutive year, after being in dormancy for several years. The newsletter contained information about the officers and Board of Directors, a message from the president, as well as the chapter's calendar of events. The newsletter was a form for members to submit articles, to read news and educational articles regarding the field of Records and Information Management (See Exhibits).

The Newsletter was distributed by mail to those individuals who did not have e-mail. Our many methods of distribution ensured that the valuable information that the chapter presented reached more than just its membership.

### **Seminars, Regional Mailings and Recruitment Drives:**

The chapter promoted the association by large recruitment drive mailings. Each mailing went to approximately 775 companies, in surrounding areas that were not participating in the local chapter of ARMA. As a result of these mailings, chapter attendance was boosted and the valuable education information was distributed to the public. The Chapter received an enormous response as a result of its recruitment drives.

The Chapter also promoted its seminars electronically, with regional mailings of the brochure. In addition to the 775 companies on the recruitment drive list, reminder letters were sent to ARMA members in the region.

**Distribution of Chapter Information:**

The chapter provided a Facts, Answers, and Questions (“FAQ”) pamphlet to new members and to vendors, to introduce them to the benefits of membership to ARMA International and the local ARMA Chapter. Vendors were asked to distribute the FAQ pamphlets to their customers and contacts that were non-ARMA members (See Exhibits).

Local chapter news and events were published in the local newspaper, Lexington Herald Leader, in their Business Monday Section.

## **SECTION IV**

### **CHAPTER MAINTENANCE**

#### **Executive Summary**

The Frankfort – Bluegrass ARMA Chapter continues to strive for excellence through the maintenance of its chapter. Although the chapter accomplished a lot in its previous year, the goal was to let that year, set precedence for the current year. The chapter achieved that goal by the maintenance of the newsletter being distributed electronically and a host of community service activities. The chapter is eager to preserve old traditions, while maintaining new ones. It is evident to all involved, that the key to chapter maintenance, is the chapter membership, the elected officers, and strong past officer participation.

#### **Chapter Membership Maintenance:**

- ◆ Chapter Member Retention
- ◆ Chapter Membership Participation

#### **Board of Director Participation:**

- ◆ Board Meetings for the association year were scheduled at the beginning of the year
- ◆ Involvement of several past presidents and committee members

#### **Member Recognition:**

- ◆ ARMA Plaques for Officers / Board Members
- ◆ Recognition of Chapter Members with five, ten, fifteen, and twenty years of service
- ◆ Awarding of the Orville F. Boes Scholarship

#### **Organization of Chapter Records:**

- ◆ Previous chapter files indexed and stored with our chapter Librarian at Kentucky Underground Storage
- ◆ Distribution of Chapter Library Index, Additional Resource Materials added to the Library
- ◆ Electronic Library of Chapter Documents and Newsletters Maintained

## **SECTION IV CHAPTER MAINTENANCE Narrative**

### **Chapter Membership Maintenance:**

Although the chapter did not grow during the 2004 – 2005 year, we did welcome several new members to the local chapter along with saying goodbye to a few members. Due to individuals changing professions and/or retiring, we lost members. However, with our recruitment drives and visibility in the community, we were able to maintain our existing membership numbers. We look forward to recruiting perspective-meeting attendees in the upcoming months.

The Frankfort - Bluegrass ARMA Chapter had overwhelming success this year with the participation of the chapters seasoned officers, past officers and presidents, and it's members.

### **Board of Director Participation:**

The Board of Directors began planning for the success of the year by scheduling Board meetings for the entire year in August 2004. The Board then defined its strategic plan to include goals to maintain last year's accomplishments, to build on them and strive even farther than we had last year.

### **Member Recognition:**

The chapter honored officers and board members with awards. The presentation of service awards and the swearing in ceremony to install officers was performed.

The chapter also honored its chapter members with five, ten, fifteen, and twenty years of service with ARMA International Service Pins.

The chapter also honored its chapter members who had perfect attendance for the year with an honorable mention and a gift certificate for one free meal for the upcoming year. Pictures were taken at the awards event/ officer installation ceremony. The photographs were published in the chapter's newsletter and will be maintained in the chapter's scrapbook.

### **Organization of Chapter Records:**

The chapter files have been passed from president to president for years in paper form. The chapter decided to organize its records and submit items not needed for chapter administration, to the chapter's Librarian, Gale G. Reece, at Kentucky Underground Storage, Inc. All pertinent information was scanned onto to CD's for easier retrieval for the new president.

An index of the chapter resource catalogue was distributed via the newsletter, so that chapter members could use the materials.

This year marks the fourth year, of the electronic library, which contains chapter documents and newsletters. This policy of retaining electronic copies of association files and burning them to a CD will save future chapter leadership countless hours of preparing documents for the chapter.

**SECTION V**  
**OUTSIDE ACTIVITIES / CHAPTER MEMBERS**  
**Executive Summary**

The members of The Frankfort – Bluegrass ARMA Chapter are the basis for the chapter’s success. Our chapter members participate in activities with ARMA International, other ARMA chapters and in the community. These activities show the dedication that these individuals have to the profession, as well as the community. For these accomplishments, The Frankfort – Bluegrass ARMA Chapter commends its membership.

**Participation with ARMA International:**

- ◆ Several chapter members of our chapter are involved in ARMA International’s Industry Specific Groups
- ◆ Several chapter members attended ARMA International’s pre-conference seminar and main conference in Long Beach
- ◆ The Chapters’ Immediate Past President is the Chair/Project Leader for ARMA International Standards Development Committee on Records Management in Litigation Support Standard and Guideline Development
- ◆ The Chapters’ Immediate Past President is a member of the 2006 ARMA International Annual Conference Program Committee.
- ◆ The Chapter’s Immediate Past President attended Board Meeting of Region Medium Size Chapter to discuss their initiative to submit for Medium Chapter of the Year.

**Promotion of the Records Management Profession in the Community:**

- ◆ Chapter members hosted tours of their facilities and records management programs
- ◆ Chapter members did numerous presentations to various groups throughout the year promoting records management
- ◆ Chapter members hosted tours of their facilities and records management programs

**SECTION V**  
**OUTSIDE ACTIVITIES / CHAPTER MEMBERS**  
**Narrative**

**Participation with ARMA International:**

We have several members who are active on both the local and international level of ARMA. Several members of our chapter attended the conference in Long Beach.

Several members of our chapter are involved with ARMA International's Industry Specific Groups ("ISG's"). We have members that are affiliated with the healthcare, legal, utilities, and insurance ISG's.

We are proud to have one of our members as a CRM Candidate.

**Chapter Membership Participation with other ARMA Chapters and Professional Associations:**

It has been a goal of our chapter to network with other information management professionals and to take advantage of additional opportunities that these partnerships present. This resulted in a joint seminar with the Kentucky Council on Archives in May and members from the Cincinnati ARMA Chapter were presenters at our April Seminar along with CRM's from the Cincinnati, Louisville and Frankfort – Bluegrass ARMA Chapters. Both Seminars resulted in a profit for the chapter.

**Promotion of Records Management as a Profession in the Community:**

Chapter member, Mark Myers, presented a total of seven presentations to various groups, including Western Kentucky University, the Society of Alabama Archivists, County Clerks Convention, and Louisville ARMA Chapter just to name a few.

Chapter member, Jim Cundy, presented a total of four presentations to various groups on Records Management, Electronic Records and Document Retention and Destruction.

Various Chapter Members hosted tours and invited both chapter members and non-chapter members to tour their facilities and demonstrate their records management program. As a result, the chapter has noticed an increase in meeting attendance.