

MRM 2019 Leadership Conference

Wyoming Chapter of ARMA

Chapter Information

2018-19 Chapter President	April Peregoy
2019-20 Incoming Chapter President	April Peregoy
Beginning # of Members	25
Current # of Members	26
Chapter Size Category	Small
Membership Goal for 2018-2019	Gain an additional member so we are back to 26 members.
Recruiting Methods	Personal contact, annual seminar, Facebook page, meeting networking
Our meetings are typically held on	Monthly on the 2 nd Tuesday of the month at lunch, September-May.
We communicate to our members through	Pres letters, emails, chapter website, Facebook page, personal contact, phone

Board of Directors Information

Number of Members	6
Types of Positions	Elected – President, Vice President, Treasurer, Secretary, Education, Webmaster. Also have a Chairperson of the Board.
Meetings (how often and method)	Monthly on the 3 rd Tuesday. In person and via conference call for those that can't be there in person. Lunch hour meeting.
What was good about your BOD.	Great participation and discussions. A lot of work has been accomplished by our 6-person board this year.
What challenges did your BOD face?	Filling our board positions and getting our current members more involved in our activities. Finding additional funding sources.
Board Transition of Members	Returning Board of 6 Directors elected in May. President and Vice-President have a limit of two one-year terms. A new board will need to be elected for the 2020-21 chapter year.
Recruiting/Succession planning methods	Personal contact with members. Post openings on the chapter website, social media sites, and the newsletter. Our best opportunity to recruit is at our Annual Spring Seminar.

Chapter Finances

Does your chapter conduct annual financial audits?	Yes. We conduct an annual audit at the end of the chapter year and before we complete and submit our 990.
Do you have monthly Treasurer Reports?	Yes.
Does your BOD review monthly bank statements?	Yes.

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Monthly Meeting Summary

Month	Attendance	Topic	Speaker	Comments
Sept. 2018	13	Decade of Discovery Movie		Showed the documentary via Amazon Prime
Oct. 2018	9	Tour of the WYDOT Transportation Center	Gabe Gutierrez Suzie Roseberry	A tour of the Wyoming Dept. of Transportation's new transportation center.
Nov. 2018	8	ARMA Live! Recap	April Peregoy	Gave a summary of ARMA Live! conference and trending topics.
Jan. 2019	7	Holiday Get-together		Luncheon at local restaurant. Weather prohibited some from attending.
Feb. 2019	10	Livestock ID Traceability and CVIs	Dr. Thach Winslow	Explanation of newest rules and tools used to collect and retrieve livestock ID and movement data.
Mar. 2019	80	Spring Seminar		See section below
Apr. 2019	13	Laramie Co. Records Tour	Deanna Grimm	Tour of facility and explanation of the county's scanning project.
May 2019	24	Denver NARA Tour	Christopher McGee	Worked with Northern CO chapter on hosting this tour. Also had attendees from Mile High chapter.

Other items of note: We had higher attendance at most of our chapter meetings this year than we have in the past couple of years. We would like to continue this trend moving forward.

Spring Seminar

Seminar Date	March 19, 2019
Meeting Time	All day event, 8am to 4pm
Attendance	80
Topics	Theme: Traditional/Electronic Information Management: Charting a New Digital World
Speakers	Jessica Harman, CRM, CIP; David Pope, CPA; Carla Hester Croff; Cindy Brown
Attendance Fee Structure	\$50 for members, \$75 for non-members, \$25 for full-time students
Vendor Investment/Support	This is our first year to have a sponsor in many years. Docu-tek, Inc. paid \$200 for a booth. Also received a sponsorship award from the Wyoming State Historical Records Advisory Board through funding from the NHPRC, NARA.
Special Activities	Silent Auction and afternoon ice cream social

Other items of note: We had the largest number of attendees in many years. This caused us to have to change room locations a couple of weeks before the seminar. Luckily, Laramie County Community College worked with us on this and we were able to get the word out quickly about the change. Many that came were interested in our presentations on blockchain and the Wyoming State Archives. Our silent auction brought in \$1,000 that will go toward our Tony and professional development award funds. A survey conducted on attendees after the meeting indicated they found it to be very informative and entertaining.

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What were your chapter's top successes?

- Had the highest Spring Seminar attendance in years.
- Had our first sponsor for the Spring Seminar in many years as well. Working on getting more.
- We are developing relationships with Wyoming shredding businesses and we hope that will lead to us being able to co-sponsor a shred day with them during the upcoming chapter year.

What really challenged the Board and/or Chapter this year?

- We have a hard time finding members willing to be more involved in our chapter.
- We did not have enough board members to cover all positions, so the ones we do have often have to take on multiple responsibilities to cover those gaps.
- Providing activities and resources for members outside of the Cheyenne area.

What expectations or ideas do you have for the coming chapter year?

- A goal we have for the upcoming year is to update our chapter by-laws.
- We are considering purchasing a new website next year to replace our current one.

Mile High Denver Chapter of ARMA Chapter Report

Chapter Information

2018-19 Chapter President	Ed Sturgeon
2019-20 Incoming Chapter President	Guy Mason
Beginning # of Members	157 (This number could have included Business Partners at the time)
Current # of Members	131 (This number comes directly from ARMA International's website)
Chapter Size Category	Very Large (Not sure if we are still in the Very Large Category)
Membership Goal for 2018-2019	Retain current membership numbers
Recruiting Methods	Chapter Website, Personal contact, LinkedIn, Facebook, Membership Director outreach
Our meetings are typically held on	Monthly on the 3 rd Tuesday of the month at lunch unless otherwise noted
We communicate to our members through	eNewsletter, Chapter Website, LinkedIn site, Facebook page, Twitter, Word of mouth

Board of Directors Information

Number of Members	13
Types of Positions	Elected – President, President Elect, Vice President, Treasurer, Secretary, Directors of Administration, Membership, Communications, Programs, Education (Spring Seminar), Web, Chairperson. Non-voting – Member-at-Large.
Meetings (how often and method)	Monthly on the 2 nd Tuesday of the month. In person and via phone bridge for those that could not attend the meeting in person.
What was good about your BOD	We work really well together as a team with input from everyone, no matter their official position. Our Chapter has made an effort to be very inclusive with our Membership/Attendees.
What challenges did your BOD face?	Defining roles by board position for management of new Star Chapter website. Losing our Chapter Treasurer half way through the year and having to train a new Treasurer.
Board Transition of Members	Members elected in June, take on new roles July 1.
Recruiting/Succession planning methods	Our practice for changing roles and empty positions has been personal contact with the membership and executive committee approaching potential candidates we feel would be a good fit for a specific role.

Chapter Finances

Does your chapter conduct annual financial audits?	We conduct an annual financial review. Review team consists of the Chairperson, incoming President, Vice President and Treasurer. Carrying over from last year we will aim to also have two non-board members on the team.
Do you have monthly Treasurer Reports?	Yes.
Does your BOD review monthly bank statements?	Yes.

Monthly Meeting Summary

Month	Attendance	Topic	Speaker	Comments	Business Partner Sponsorships
Sept 2018	79 Total	HB18-1128 Protections For Consumer Data Privacy: Colorado's New Cyber Security Law and What You Need to do to Comply	Mitch Tanenbaum	We marketed this meeting to the Association of Legal Administrators (ALA) and got quite a few guests to attend.	Meeting Sponsor – Buddha Logic
	40 Members		Brian Mueller	Business Partner Workshop – Robotic Process Automation in the Real World: Case Studies Using Robotic Process Automation / Cognitive Document Automation – The Next Step After Robotic Processing	Buddha Logic
	39 Guests		Scott Powers		
Oct 2018	21 Total 16 Members 5 Guests	Tour – Coors Field and Networking Event	N/A	This was a behind the scenes tour of Coors Field, home to the Colorado Rockies, free to Chapter Members followed by a fun networking event to raise funds for our Chapter Charity.	Networking Event Sponsor – Access
Nov 2018	38 Total	Conflict Resolution Skills For the Workplace	Karen Feste	This was an engaging presentation to help attendees better understand conflict resolution. Very timely with the holidays coming up.	Meeting Sponsor – Buddha Logic
	31 Members 7 Guests		Charles Weidman	Business Partner Workshop – Everything You Need to Know About RPA in 30 Minutes	Buddha Logic
Dec 2018	23 Total	Holiday Themed Meeting and Networking Event	Elesha Johnson	Two of our Board members presented on volunteering for the Board. Followed by a presentation from our Chapter Charity, Pets For Vets. This included a fun networking event with a “White Elephant” Gift Exchange along with drinks and appetizers.	Meeting Sponsor – Long View
	17 Members		Guy Mason		Networking Event Sponsor – Total Document Solutions, Inc.
	6 Guests		Julie Jury		
			Patrick Cardello	Business Partner Workshop – Kill Your File Shares With File Analysis	Active Navigation
Jan 2019	43 Total	How To Position Your Information Management (IM) Program For Strategic Success	Lisa Cromwell / Amelia Johnson	This was a half day seminar. Very well attended and all participants enjoyed the topic, speakers and attendee participation activities.	Meeting Sponsor – Total Document Solutions, Inc.
	33 Members 10 Guests		Jack Kim	Business Partner Workshop – Records Management and Microsoft Teams in a Modern Unstructured World	Long View

Feb 2019	45 Total	Digital Transformation at Hormel Foods and the Impact on RIM/IG	Dynessa Nordrum	This was a well-attended event given by the current Region Director for the Midwest Rocky Mountain Region.	Meeting Sponsor – Access
	38 Members 7 Guests		John Isaza		
Mar 2019	38 Total	Audits, Assessments, and Analysis – Toward a Transformational IG Program	Stephanie McCutcheon	This was a well-attended event to help attendees develop an assessment process to monitor IG policy compliance, demonstrate adherence, capture metrics and leverage internal partners to create compliance.	Meeting Sponsor – Active Navigation/ Information Governance Solutions (igs)
	30 Members 8 Guests		Charles Weidman		
Apr 2019	119 Total 47 Members 39 Guests 33 BP Affiliated	From RIM to IG and Beyond	Multiple	2019 Spring Seminar; One track with multiple speakers (See breakout on following page)	Seminar/ Networking Event Sponsor – Total Document Solutions, Inc.
May 2019	51 Total	Cleaning Up Shared Drives	Susan Cisco	This was a well-attended event to help attendees establish a policy foundation, collaborate with IT, and support a pilot project for tidying up a shared drive initiative.	Meeting Sponsor – Access Sciences/ Iron Mountain
	32 Members 19 Guests	Energy Industry Roundtable	Stephanie McCutcheon/ David Foley		
Jun 2019	42 Total	Boulder County Sheriff’s Dept. Canine (K-9) Unit, Annual Business Meeting and BP Appreciation Brunch	Kelly Boden / Jason Ryan	Chairperson’s Meeting – This was a fun and educational meeting.	Meeting Sponsor – Total Document Solutions, Inc.
	26 Members 16 Guests		Ed Sturgeon	Annual Business meeting held to elect 2018-2019 Board. Presentation of “big check” to Chapter Charity, Pets For Vets.	
			Ed Sturgeon	BP Appreciation Brunch to present the 2018-2019 BP Program.	
			Jack Kim	Business Partner Workshop – “Microsoft Teams – The Madness Continues”	Long View

Other items of note: Our theme for the programming this year was “From RIM to IG and Beyond” – topics and presentations were selected that would bring value to the attendees and their employers no matter what level of education, experience or Records Management maturity they were at. We brought back the Denver Dollars Program for the 2018-2019 Chapter Year and rebranded it as the Mile High Moolah Program.

Spring Seminar

Seminar Date	Tuesday, April 16, 2019
Meeting Time	All day event. 7:30 AM to 5:00 PM (networking event until 7:30 PM).
Attendance	47 Members, 39 Guests, 33 Business Partner attendees (119 Total)
Topics	<p>Campfire Discussions – Topics included: Building File Plans; The Value of a File Inventory; RIM/IG Issues surrounding three (3) areas: Law Firm Records, Energy Records, Governmental Records; Managing an ECM Implementation; Managing Unstructured Data</p> <p>Keynote – What a difference 30 years makes... 7 Habits of Highly Successful Programs Bridging the Gap Between Security Awareness and Action Passion & Creativity – Igniting the Champion Inside of You Blockchain Essentials: What RIM/IG Professionals Need to Know The key to IG success: Start small Foundations of IG are the SAME as RIM + Privacy</p> <p>Endnote – Mentoring, Motivating, and Managing People to Achieve Success as Records Management and IG Professionals</p>
Speakers	Sue Trombley, Dave Foley, Andrew Ysasi, Jacki Cox, Brent Gatewood, Teresa Schoch, Mark Langemo
Attendance Fee Structure	\$150 for members, \$175 for guests, \$125 for students; \$25 off for early bird registration.
Vendor Investment/Support	18 business partners - 1 Platinum, 3 Gold, 4 Silver, 10 Bronze (booths at the spring seminar are included in BP’s annual sponsorship). Most provided a door prize for the drawing at the end.
Special Activities	We had a special promotion to solicit donations for our Chapter Charity – Pets for Vets. For a \$10 donation the donor received a wristband. This donation program was a huge success as we raised \$695.00 during the day. Our Silent Auction raised \$907.00 and 50% of proceeds went to the Chapter Charity. Campfire Discussions were new this year and were well attended during breakfast.

Other items of note: We changed back to a single track with a different layout which allowed the Business Partners to be in the same room as the keynote/lunch/endnote presentations and the networking event to allow for more interaction with attendees. Speakers were well received; excited to have popular speakers Sue Trombley as our Keynote Speaker and Mark Langemo as our Endnote Speaker. We offered a Prepay Option to members and guests. This one-day seminar was preapproved for 8 ICRM credits and 7 IGP credits.

What were your chapter's top successes?

- Fourth year of having a whole-year theme. Having a theme for the program year allows us to find speakers and topics that match the theme for the year.
- Held a pre-planning meeting with President, Education Director and Programing Director in June 2018. This pre-planning meeting with theme in place helped direct programing and gave us an added head start on speaker engagement.
- Held planning meeting in August, almost the entire Board attended.
- Increased communications to members by emailing an electronic Newsletter at least twice a month, plus meeting reminders with additional content.
- Updated Chapter Website home page at least monthly with President's Message.
- Early and monthly planning for the spring seminar. Speakers were confirmed early.
- Positive increased participation from Business Partner Community. Each of the last five years, we have continued to enhance and refine our BP Program to construct more value for investment. The Buyer's Guide was made available in both hardcopy and electronic versions this year.
- Very successful Chapter Charity campaign. Exceeded expectations in donations received - \$2,600.00 was presented in a "big check" to representative from Pets For Vets at our final chapter meeting of the year in June 2019.
- We saw more student engagement this year as a direct result of International allowing students to join International at a discounted rate. We were able to present Meghan Connolly with our Student Member of the Year award.
- Business Partner Workshops – We held 7 Business Partner Educational Workshops in coordination with the regular educational event.
- Our Denver Dollars Program was revamped into the Mile High Moolah Program. This program gives back to the members of the Chapter monetarily in the form of gift cards for participating during the chapter year.

What really challenged the Board and/or Chapter this year?

- Updating the Membership List within our Star Chapter website was challenging as we had numerous people entered as members, such as Business Partners and people from other Chapters, that would be deleted when we imported the list from International.
- Just as our new Chapter Treasurer was getting the hang of the position, she had to resign from the Board in November, 2018. Luckily we had a volunteer who wanted to step into the position in January, 2019, but training the Chapter Treasurer is a difficult task.
- We will be replacing six (6) Board positions this year (Pres-Elect, Admin. Director, Programs Director, Secretary, Communications Director, and Vice President)

What expectations or ideas do you have for the coming chapter year?

- Continue yearly theme and full year programing, including Spring Seminar.
- Review our Business Partner Program.
- Review our Mile High Moolah Program.
- Review our Chapter Member of the Year, Chapter Leader of the Year, and Student of the Year Award Programs.
- Review our Scholarship Opportunities Program.

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NEBRASKA

Chapter Information

2018-19 Chapter President	Amber Roberts
2019-20 Incoming President	Cori Brock
Beginning # of Members	59
Current # of Members	59
Chapter Size Category	Medium
Membership Goal for 2019-2020	65
Recruiting Methods	Personal contact, chapter members, emails, website, Facebook. Member/Non-member database contains contact info for past members and non-members who have attended past meetings. We email both lists about monthly meetings and seminar.
Our meetings are typically held	Monthly on the 3 rd Wednesday of the month at lunch, September thru June.
We communicate to our members through	Email, chapter website, Facebook page, Twitter and in person at meetings.

Board of Directors Information

Number of Members	10
Types of Positions	Elected – Immediate Past President, President, Vice President, Secretary, Treasurer Appointed – Librarian/Archivist, Membership Director, Director of Program Arrangements, Public Relations Director, Webmaster
Meetings (how often and method)	Monthly, 3 rd Wednesday of the month before chapter meetings. (Except April). Meet twice in the summer for Program Planning.
What was good about your BOD.	Good participation and discussions. The Board Members get along well and enjoy the time together.
What challenges did your BOD face?	Recruiting new board members that have not been on the board before.
Board Transition of Members	The outgoing board members provide information to the incoming members and are available as resources for them to lean on if needed. Many of the board members have been around a long time as well and help out by answering questions on past decisions and offering feedback.
Recruiting/Succession planning methods	Elected Board Members serve 2 year terms. We encourage involvement in seminar planning to attract candidates and we reach out personally to prospective candidates. We also take nominations.

Chapter Finances

Does your chapter conduct annual financial audits?	Yes.
Do you have monthly Treasurer Reports?	Yes.
Does your BOD review monthly bank statements?	They are available but normally just the Treasurer and Past Treasurer reviewed each month and the board got a summary.

Monthly Meeting Summary

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Month	Attendance	Topic	Speaker	Comments
9/19/18	35	Using Data Analytics to Server Customers: A NE Interactive Case Study and UNL Memorial Stadium Tour	Sara Larkins, NE Interactive	Tour of University of Nebraska, Lincoln's football stadium and grounds.
10/17/18 Bosses' Day	41	Unified Data and Information Governance	Rich Kessler, KPMG	
11/14/18	40	Out of the Ashes and Back in Business: How the NE Dept of Insurance Recovered from Fire	Mark Peterson, NE Dept of Insurance	
12/12/18 Charity Auction	49	Buried Treasure: Sharing a Record Manager's Conundrum	Shannon Lewis-Jackson, History Walks LLC	Annual Charity auction and invited ARMA alumni and had a great time reconnecting with old friends.
1/16/19	44	Multi-Generational Differences at Work	David Arch, Management Consultant	
2/20/19	75	The European Union's GDPR Has Changed the World of Privacy Law	Rick Jeffries, Cline Williams	This was a co-hosted event with the Nebraska Paralegal Association (NePA) that unfortunately got cancelled due to weather but would have seen nearly double our normal attendance.
3/20/19	39	Using Active Navigation: a Case Study of Ameritas	Robin Martin, Ameritas	We had a demo of Active Navigation's software after the luncheon which was a first for us.
4/17/19	73	Spring Seminar	Jason Stearns, BlackRock and Bob Prentice, "Mr. Attitude" as Keynote	Excellent and engaging speaker and Keynote speaker. Pulling in a professional motivational speaker went over well even though it cost us a bit more.
5/15/19 Legal Day	47	Developing Defensible Deletion Strategies	Reggie Pool, HBR Consulting LLC	This was another co-hosted event with NePA with one of their smaller districts but still a good opportunity to network.
6/12/19 Awards	35	Professional Records Certifications	Bill Bradford, ARMA International	Bill did the presentation and then the ceremony to install our new officers.

Other items of note: We had very productive chapter meetings this year. We did surveys after some of the meeting, but the responses were limited. We would like to get better feedback from our members.

We participated in Interface which is a one-day, free technical conference with vendors providing most of the presentations (they must be relevant, timely and product agnostic). Our president was on the Advisory Council so was able to suggest and get presentations regarding Information Governance and Policies which was well-received. She plans to suggest more IG topics this coming year. We also had a booth at the conference (free of charge) where we passed out information on ARMA, popcorn, koozies, and coupons for one free luncheon. We had a drawing for a gift card and got a lot of contact information that way for our Membership Director to follow up on. We plan to attend this year as well. Interface is in many locations throughout the US, so you might want to have other chapters check into it to see if they can find some prospective members that way.

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Spring Seminar

Seminar Date	4/17/19
Meeting Time	All day event, 7:30 AM to 4:00 PM.
Attendance	73
Topics	The Power of i: Blockchain, Implementing IG, GDPR & CCPA, Getting Unstuck: Keeping Your Plans Moving Forward – Jason Stearns Keynote-Motivational Speaker Bob Prentice – Leadership & Employee Development
Speakers	Jason Stearns and Bob Prentice
Attendance Fee Structure	\$175 for members, \$195 for non-members. \$25 off for early bird registration.
Vendor Investment/Support	Platinum – Datashield (1500), Gold – Hyland and Access (1000), Silver – RIC & Iron Mountain (500), Bronze – Capital Business Systems & Nebraska Public Power District (300), Boosters – Fraser Stryker, Jordan Lawrence & Klute Truck Equipment (100). Many companies and members provided door prizes and gift bag goodies.
Special Activities	Our Membership Director dressed as Miss Information and had funny props guessing games for our members (iPad, facebook, music, mobile phone, etc all made out of something else)

Other items of note: We had a lot of great feedback on both speakers. Everyone loved the food and location.

What were your chapter's top successes?

- The Spring Seminar was another successful event. We received very positive feedback regarding the speakers and had better turnout than the previous year. We hope to reach 75 this coming year and the same location is secured for 2020.
- Planning the entire year out during the summer really makes the entire year flow smoothly.
- We changed up our business partnerships this year and saw improved funding this year.
- Our Charity was a hit again this year. We helped support 639 Warrior advocates which is a local chapter to help disabled vets pay for their service dogs and their vet bills. We raised over \$2500.

What really challenged the Board and/or Chapter this year?

- We are struggling with dropping membership rates (mostly due to retirements for us) as most associations and chapters are. We know we need to recruit more people, young ones in particular, but we find it difficult to get them to come to meetings. We've looked at webex platforms and options, but the board is concerned that if we offer those we'll lose attendance in person. We seem to be in a catch-22 so would be interested to see how other chapters are handling it and if they've had successes.
- We are struggling to engage our members more. Typically the board does the majority of all work and we're looking to see if we can get more committee help to share the workload and also recruit new members to the board.

What expectations or ideas do you have for the coming chapter year?

- We plan to step up our recruitment efforts to increase membership which includes participating at Interface again with a booth and implementing some ideas our new Membership Director has proposed. We're also looking to get a committee of 5 or so members to assist.
- We're looking to partner with other organizations to get access to new membership or attendee groups. The Nebraska Paralegal Association (NePA) went well so we're looking to do more of this. We plan to offer joint meeting opportunities where we split the cost of the meeting in some fashion and each organization will get a few minutes to share their mission and format so that attendees who might be interested can then follow up to attend other meetings of relevance to them.

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ND Bismarck/Mandan Chapter

Chapter Information

2018-19 Chapter President	Chris Carper
2019-20 Incoming Chapter President	Karen Bjornseth
Beginning # of Members	23
Current # of Members	20
Chapter Size Category	Small
Membership Goal for 2019-2020	25
Recruiting Methods	Personal contact, Facebook, seminar, emails, etc.
Our meetings are typically held	Bi-Monthly on the second Tuesday of the month
We communicate to our members through	Email, Facebook page, personal contact

Board of Directors Information

Number of Members	7
Types of Positions	Elected: President, Vice-President, Treasurer, Secretary, Board Member-at-Large (2) and Outgoing-President
Meetings (how often and method)	Monthly (minimum) - typically the week prior to chapter meetings. Via teleconference (tried video conference for a couple of meetings as well) to accommodate the 275 mile difference. Also, met in-between when necessary to discuss seminar.
What was good about your BOD.	New members and ideas, trying new techniques (video conferencing), Good participation, good discussions.
What challenges did your BOD face?	Educational programming.
Board Transition of Members	Board positions turn over every 2 years. Nominations in April, elected in May, take on new roles in July.
Recruiting/Succession planning methods	Email job descriptions so have expectation of roles, Personal contact with members. Communications via email and Facebook.

Chapter Finances

Does your chapter conduct annual financial audits?	No
Do you have monthly Treasurer Reports?	Yes
Does your BOD review monthly bank statements?	Part of Treasurer's Report

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Monthly Meeting Summary

Month	Attendance	Topic	Speaker	Comments
Sept 2018	10	Tour – UND SMHS – The role of RIM in moving the SMHS	Susan Carlson	
Nov 2018	5	U of Mary-Tour	David Gray	
Dec 2018	12	“Mistake or Surprise? Paving Your Career through the IG Profession”	Brianne Aul	Webinar – Held at two sites in ND
Jan 2019	9	Basic Functions and Uses of Block chain and Cryptocurrency	Sarah Sargent	Webinar – Held at two sites in ND
Mar 2019	8	Current and Future Opportunities for RIM Professionals: Where Do We Go From Here?	Shari Perlstein	Webinar – Held at two sites in ND

Other items of note:

Spring Seminar

Seminar Date	April 16 th , 2019
Meeting Time	All day event. 8:00 am to 5:00 pm (registration: 8-8:30)
Attendance	9 members, 21 non-members, 3 vendor sponsorships (2 in attendance)=32 total attendees
Topic's	Theme: Forging a Path to RIM Success
Speakers	Ben Greene (Land O'Lakes) covered “Managing Email and Reducing PSTs in your Organization” and “Managing E-Discovery and Legal Holds” Monica Crocker (Wells Fargo) covered “Establishing Healthy Boundaries to your RIM Program” and “A Practical Approach to Taxonomy Development”
Attendance Fee Structure	\$125 for members, \$135 for non-members, \$100 (if >4 people attend from the same company), \$85 students and \$200 (vendor sponsorships, plus door prizes).
Vendor Investment/Support	3 vendors. All three vendors (in addition to other companies) provided door prizes for the drawings during breaks (as an incentive to be back on time) and at the end.
Special Activities	N/A

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Other items of note:

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What were your chapter's top successes?

Increased meeting attendance and access (webinar access in two locations)
Proceeded with a chapter name change for increased awareness across the state
Scheduled a successful spring seminar
Three new chapter members joining the BOD.

A Board of Directors that really cares and works hard to bring engaging material to our chapter members.

What really challenged the Board and/or Chapter this year?

Chapter members are geographically dispersed over hundreds of miles.
Difficulty finding speakers in the area.
Membership stagnation.

What expectations or ideas do you have for the coming chapter year?

**Choose a web based program that can connect us visually and electronically for meetings.
Expand membership based on the ability to reach more areas of the state with web based meetings.
Continue to work with other Chapters and groups to offer varied webinars and discussions to engage our members.**

2019 Leadership Conference

St. Louis, MO

Chapter Information

2018-19 Chapter President	Rita Grant
2019-20 Incoming Chapter President	Rose Dunn
Beginning # of Members	Unknown
Current # of Members	65
Chapter Size Category	Small
Membership Goal for 2019-20	75
Recruiting Methods	Plan: Send out emails or letters to potential members
Our meetings are typically held on	Monthly on the 3 rd Thursday of the month at lunch unless otherwise noted.
We communicate to our members through	Website, email

Board of Directors Information

Number of Members	6
Types of Positions	Elected – President, Past President, Treasurer, Secretary, Directors of Membership, Communications
Meetings (how often and method)	Monthly on the 1st Thursday of the month prior chapter meetings. In person or via phone bridge.
What was good about your BOD.	Good participation, good discussions. We made a lot of progress this year.
What challenges did your BOD face?	We had to cancel an education session due to low registration. One board member was MIA.
Board Transition of Members	Members elected in June, take on new roles in July.
Recruiting/Succession planning methods	Personal contact with members. Announced openings during meetings.

Chapter Finances

Does your chapter conduct annual financial audits?	We have had no audit and have discovered a significant discrepancy between checkbook and bank balance.
Do you have monthly Treasurer Reports?	We requested them but the Treasurer was MIA.
Does your BOD review monthly bank statements?	The incoming treasurer will.

2019 Leadership Conference

Monthly Meeting Summary

Month	Attendance	Topic	Speaker	Comments
Sept 2018	Unk	Work Life Balance	Cindy McDaniel	Well-received
Oct 2018	Unk	Disaster Recovery	David Patrician	Well received, lots of discussion
Nov 2018	0	Dressing for success/ Your Resume	Kim Fredrick; Holly Hutchinson	Cancelled; Low registration
Dec 2018	2	Holiday Party		Bummer
Jan 2019	0	No scheduled meeting		
Feb 2019	Unk	Transitioning from paper to electronic	Mike Steinman	Good discussion
Mar 2019	Unk	Telemedicine	Tour of Virtual Facility	Small group but was interesting
Apr 2019	Unk	Spring Conference	See below	Good turnout; lots of discussion
May 2019	Unk	Industry Panel Discussion	Members of Chapter in various industries	Good discussion
Jun 2019	Unk	Member Input and Roundtable Discussion	All attendees	Good discussion; Installation of officers.

Spring Seminar

Seminar Date	April 18, 2019
Meeting Time	Half Day: 8:30-Noon
Attendance	Unknown
Topic's	White Collar Fraud and Insider Threats, All Those Records: Keep them or Destroy Them? Cybersecurity
Speakers	Agents J. Wade Beach and Matt Giegling, Sanja Ord, Julia Eudy
Attendance Fee	\$75 per attendee
Structure	
Vendor	Door prizes, writing materials, trinkets
Investment/Support	
Special Activities	None

2019 Leadership Conference

What were your chapter's top successes?

- We maintained membership and slightly increased attendance at meetings

What really challenged the Board and/or Chapter this year?

- Finding speakers was somewhat difficult.
- Finding volunteers to serve in ANY capacity.

What expectations or ideas do you have for the coming chapter year?

- We want to grow the membership and will be more proactive in reaching out.

MRM 2019 Leadership Conference

NORTHERN COLORADO ARMA CHAPTER

Chapter Information

2018-19 Chapter President	Vicki Lucero
2019-20 Incoming Chapter President	Vicki Lucero
Beginning # of Members	25
Current # of Members	21
Chapter Size Category	Small
Membership Goal for 2019-2020	30
Recruiting Methods	Personal contact, advertise via email distribution group, LinkedIn group, <i>Recently realizing that in past year or so, 11 former members dropped off of our roster</i>
Our meetings are typically held on	We try to schedule on second or third Thursday of month. This year, we had some meetings on second Wednesday's, which worked okay on some months.
We communicate to our members through	President's emails, LinkedIn site We are still hoping to have a Facebook page in coming year

Board of Directors Information

Number of Members	3 – three positions vacant
Types of Positions	Elected – President, Vice President, Treasurer, Secretary, two Directors of Membership at Large
Meetings (how often and method)	Monthly on the 2 nd Monday of the month Via phone conference
What was good about your BOD.	Good participation, good discussions. We had good ideas and tried, but there wasn't the participation from chapter members we hoped for. Although, we didn't cancel any programs due to low attendance.
What challenges did your BOD face?	Getting our great ideas to fruition. Lack of resources (mostly planning and organization resources).
Board Transition of Members	Members elected in June, take on new roles in August.
Recruiting/Succession planning methods	Personal contact with members. Post openings via chapter emails, social media sites

Chapter Finances

Does your chapter conduct annual financial audits?	With each monthly Treasurer report we include redacted bank statements, all invoices, and all payment confirmations to Board.
Do you have monthly Treasurer Reports?	Yes – see financial audit above.
Does your BOD review monthly bank statements?	Yes – see financial audit above.

MRM 2019 Leadership Conference

Monthly Meeting Summary

Month	Attendance	Topic	Speaker	Comments
Sept 2018		No Program		
Oct 2018	6	A Conversation with the County Clerk	Angela Myers	A great program to learn about Public Records and Public Information processes. Angela kept it RIM relevant.
Nov 2018	3	Discovery Museum and Fort Collins Archive Tour	Lesley Struc	Even though registration was still low, we kept this tour, as it was previously cancelled in March 2018. Archives was very interesting and exhibit space had a lot of history and interesting exhibits.
Dec 2018		No Program		
Jan 2019	12	Cyber Security	Tom Iwanski Jen Barna	More non-members attended this program. Speakers provided two handouts. New CO HB18-1128 was discussed. Great dialogue.
Feb 2019		No Program		
Mar 2019		No Program		
Apr 2019		No Program		
May 2019	25	Tour of NARA	Chris Magee	Joint program with WY Chapter, and some MHD members also attended. Great tour and info. Group met for lunch before going for tour.
Jun 2019	6	Tour of Morning Fresh Farms Dairy and End of Year program	Pinky was our tour guide	Tour of Dairy where Noosa products are made; 1870's schoolhouse; old log cabin saved from High Park fire; Dairy Go-Round for Cow milking; and discussed their role in the Fish Ladder Project.

MRM 2019 Leadership Conference

Other items of note: We are a very small board and limited resources in terms of topics, venues, and chapter member participation at events.

Spring Seminar

Seminar Date None

Meeting Time

Attendance

Topic's

Speakers

Attendance

Fee Structure

Vendor

Investment/Support

Special Activities

Other items of note:

MRM 2019 Leadership Conference

What were your chapter's top successes?

- Joint effort program with Wyoming Chapter to tour the regional NARA facility in Denver. Board members from both chapters worked together to make this a successful program with several attendees from both chapters.
- Held more programs this year than last year. Had better attendance.
- Board members had great suggestions for programs.

What really challenged the Board and/or Chapter this year?

- Board members would come up with good ideas, but because of other obligations or lack of resources, the event would get tabled (at least we didn't cancel any programs this year).
- Gaining enough interest from Chapter members to attend some of the planned events.
- Maintaining our membership, it fell this year.

What expectations or ideas do you have for the coming chapter year?

- We want to discover what topics will benefit our members and do what it will take to provide these educational events.
- Several chapters have reported good reception on FBI or White House topics, and we want to explore holding a program on one of these topics (if not both).