

POOR RICHARDS ARMANAC

THE OFFICIAL NEWSLETTER OF THE LIBERTY BELL CHAPTER OF ARMA

PLEASE JOIN US FOR OUR NEXT CHAPTER EVENT !!!

Thursday, November 15, 2012

Holiday Inn - 4th & Arch Streets - Philadelphia, PA 19106

3pm-4pm	Board Meeting
4pm-5pm	CRM Study Group
5pm-6pm	Networking/Registration
6pm-7pm	Dinner
7pm-8pm	Presentation

Developing A Defensible Destruction Process For your Records

Speaker Bio:

John Montaña has been deeply involved in the legal aspects of records management and retention scheduling for over twenty years.

In 1999, Mr. Montaña formed Montaña & Associates to provide independent consulting on the full spectrum of legal and other issues in the records management discipline. In 2002 he formed PelliGroup and continued expanding his knowledge and expertise within the information governance field. Recently he returned to his roots and relaunched Montaña & Associates.

In addition to his writing, research and advisory work on behalf of clients, Mr. Montaña's efforts over the past several years have focused on researching and interpreting records retention requirements in countries beyond the U.S.

Mr. Montaña is a member of ARMA International where he formerly served as a contributing editor on legal issues and continues to serve as a member of their publications committee. He is also a member of the American Bar Association and a frequent local and national speaker on compliance, electronic records, discovery and other records management topics. John has also received acclaim for his mock trials centering on records management, discovery response, spoliation and related issues.

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SPECIAL POINTS OF INTEREST:

- We have a new Chapter President for the first time in 4 years !!
- In June 2013, our Chapter will be participating in the ARMA International Road Show. What's that? Stay tuned for more details !!!

PRESIDENTS MESSAGE



Hello Chapter Members,

First let me introduce myself since a good many of you may not know who I am. My name is John Stubbs and I was elected to the position of chapter president for this term of office which expires June 2014. I have served as the chapter vice-president for the last year and chapter webmaster for over three years. I was also recently appointed to the position of webmaster for the Mid-Atlantic Region of ARMA. I am the Chief Information Management & Compliance Officer for the law firm of Fox Rothschild LLP. We are headquartered in downtown Philadelphia with seventeen offices in nine states and the District of Columbia .

I have worked in information management in some fashion since 1986 in government, corporate, legal, and outsourcing environments. I am a Certified Records Manager (ICRM), and Certified Information Professional (AIIIM) with various other certificates to help maintain my certifications and expand my knowledge of our ever-changing profession.

In my position as president I see my responsibility to be that of steering our chapter in a direction that helps grow our membership, helps provide our membership with the resources needed to be successful in whatever they pursue, and ensure our chapter has strong board leadership and dedicated committee chairs.

Our chapter has been very fortunate in having strong leadership on the board for quite a few years. A great example of this strong leadership is best seen in the man whose shoes I will be trying to fill. Ray Davis has led our chapter as President for the past three years or more. Ray is always in high spirits, always with an idea, always with the voice of reason, and most importantly, always with an ear to hear what others have to say. Ray has kept our chapter strong while serving as president through some very difficult times. And Ray has done this all while also chairing our newsletter committee and composing and editing our newsletter. He has also stepped in at times to fill vacant committee positions, like the library, housekeeping, program director, and on and on.

Ray has also been a strong advocate for our chapter at the International, doing his best to see that we got the recognition we deserved. Ray also hosts his own radio show, Inside The Records Room every Tuesday, promoting our profession and educating his listeners on what we do and how we can do it better.

Ray will still be around; I don't want to make it sound like he will not have any involvement in our chapter. On the contrary, Ray will sit as Chairman of the Board as past president. Ray will help your new president stay on track and give some gentle prodding if and when necessary. Ray was recently appointed Region Coordinator for the coming two years and will now use his knowledge to help other chapters in our Region.

Please join me in congratulating Ray in his appointment and thanking him for all that he has done in the past years and all he continues to do.

In closing, I'm looking forward to what we all can accomplish in the coming years. I'm fortunate to have a strong board to help support me in my efforts but I am reaching out to you, our membership, to come join us at our board meetings. Come see and hear the decisions we are making for our chapter. Better yet, join us on the board or on a committee and help us make those decisions that will keep us the best chapter in the Region, if not the International.

TERRI CARLINE**THE LIBERTY BELL CHAPTER MEMBER OF THE YEAR FOR 2011-2012**

The Chapter Member of the Year is an annual award given to the individual from our chapter who has made the highest level of contribution to our chapter activities and best supports ARMA International's objectives for the previous season.

All Chapter Member of the Year award winners from all 120 chapters were recognized at the ARMA International Awards Event held during their Annual Conference and Expo in Chicago, IL

We would like to take this moment and congratulate TERRI CARLINE for winning the Chapter Member of the Year award and thank her for continuing efforts to promote ARMA International and the Liberty Bell Chapter of ARMA. Terri has been a member

of our chapter for quite some time. She has been a member, a Director, and currently assists us by as Publicity Chair. Yes, all of the email notifications about our meetings as well as from other ARMA/AIIM chapters comes through Terri. We'd hate to imagine where we would be without her efforts.

Thanks Terri and Congratulations !!!!

**PETE CASEY****THE LIBERTY BELL CHAPTER LEADER OF THE YEAR FOR 2011-2012**

The Chapter Leader of the Year Award is given to the Chapter Board Member for their Leadership, participation in, and contributions to the chapter and regional and/or ARMA International activities.

The Chapter Leader of the Year is also a person who has supported and promoted ARMA International objectives.

Chapter Leader of the Year award winners from all 120 chapters were recognized at the ARMA International Awards Event held during their Annual Conference and Expo in Chicago, IL

We would like to take this moment to congratulate PETE CASEY for winning the Chapter Leader of the Year award and thank him for his continuing efforts to lead this chapter in the best interest of its members and ARMA International.

Pete has been in all positions of Board management; from Director all the way up to President.. For the past four years, Pete has been a Region Coordinator for the Mid-Atlantic Region. This season Pete has returned to the Board and holds the position of Vice President.

Thanks Pete and congratulations !!!

THE EX-PRESIDENTS MESSAGE



Effective July 1, 2012 I ended my term as President of the Liberty Bell Chapter of ARMA. Time flies when you're having fun. I had the pleasure of leading this chapter for four (4) years and I have enjoyed every minute of it !!!

Before I took the Office of President, I reached out to one of my mentors, George Darnell from the ARMA Nova Chapter. George was our Region Coordinator when I first joined the Liberty Bell Chapter Board of Directors and I have always valued his opinion and have tapped on him for his wealth of knowledge to help me during my time as President. One of the first questions that I asked him when I became President was "what advice do you have for an incoming President ?". His response was quick and made perfect sense. He told me "You can never say thank you enough. Every position on the Board as well as the committee chairs are volunteer. People who hold these positions are giving their time and effort freely and without compensation. You can never say thank you enough.". And over the last four years, I know George was 100% correct !!!

Without question, we never could have accomplished the things we did without the team effort of the entire board and committee chairs. So with this being my last column for our newsletter, now as the Ex-President, I'd like to take one more opportunity to say thank you.

Over four (4) years there have been many Directors and Committee Chairs that I'd like to thank, so without further ado ... and in alphabetical order and Ladies first, I'd like to say:

**Thank You
For All of Your Help !!!**

Terri Carline, Maria Efstratiades, Audrey-Ellen Gaines, Carolyn Hessinger, Ellie Kidd, Janice Raphael, Eileen Reader, Margaret Wrigley, Pete Casey, Jesse Cheatham, Christian Holmwood, Dennis Huston, Bernie Lasoski, Keith Reynolds, John Stubbs, and Bruce White.

But most of all, I'd like to say Thank You to the members of the Liberty Bell Chapter. It has been a privilege and an honor to have been your President. I've enjoyed meeting with you, interacting with you, and without question, you've helped me grow and I'm very thankful for that !!!

And my advice to John Stubbs, our new Chapter President is the same that was given to me by George Darnell. You can never say Thank You enough !!!

See you at our Chapter Meetings !!!

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Presentation Brief:

With all of the records your company has to manage, it can be overwhelming to differentiate between what to keep and what to destroy. Further, when a record is destroyed, there are potential legal repercussions if you do not have a proper destruction process in place.

In this webinar we will look at the how to develop a disposition process that's defensible, how to document it with suitable policies, and the best methods to execute the process and the importance of having a Records Management program firmly in place. We will also examine the common pitfalls to avoid that will help you avoid the legal minefields awaiting those who aren't careful.

What you will learn:

- Why you need to develop policies and procedures to create a defensible process
- Methods to create and implement a defensible process
- How to avoid the common pitfalls awaiting the uninformed
- The questions to ask before signing with a new vendor

Dinner Menu

Salad

Iceberg Wedge with Bacon, Blue Cheese, Chopped Tomato, and Creamy Blue Cheese Dressing

Entrees - Your Choice of One

Stuffed Breast of Chicken

Baked with Mozzarella Cheese and Prosciutto Ham Filling

Sweet Bourbon Flat Iron Steak

Grilled and Drizzled with a Sweet Bourbon Sauce

Pasta Bruschetta

Plum Tomatoes, Red Onions, Garlic, Basil, Oregano, and Fresh Mozzarella tossed with Penne Pasta and Sprinkled with Parmesan Cheese

Cost: Members \$30 Non-Members \$35

Please visit our chapter web site and register, so you have a reserved seat at this meeting !!!

www.armalb.org

HAVE YOU HEARD ABOUT OUR CHAPTER CRM STUDY GROUP ?

Five years ago our Chapter Vice President, Pete Casey, CRM created our CRM Study Group. After achieving his own CRM, Pete wanted to help other chapter members do the same. It has been fantastic to note that because of his efforts in starting this group we have had a number of chapter members achieve their CRM's.

For those of you that haven't had the opportunity to attend one of Pete's CRM Study Group Sessions, here's what you're missing;

- The meetings are usually held from 4pm-5pm after our monthly Board Meetings.
- Details about the testing process.
- Study tips are provided
- Discussion topics specifically related to each Exam Part

If you have an interest in joining our CRM Study Group and would like more information, please contact Pete Casey, CRM by e-mail Peter_Casey@comcast.com

Listed below is the upcoming CRM Study Group dates and topics to be discussed at each meeting;

2012-2013 CRM STUDY GROUP SCHEDULE

Month	Review Details and Discussion Topics
November 2012	CRM Exam Part 1
January 2013	CRM Exam Part 2
February 2013	CRM Exam Part 3
April 2013	CRM Exam Part 4
May 2013	CRM Exam Part 5

We Hope To See You At A Future CRM Study Group Meeting !!!

We Are On The Web www.armalb.org

LIBERTY BELL CHAPTER OF ARMA

YOUR REGIONAL AUTHORITY ON RECORDS AND INFORMATION MANAGEMENT



At this time, we are still finalizing our event schedule for the upcoming 2012-2013 season.

Please check out the upcoming December newsletter as well as the chapter web site for a more detailed schedule of events.

2012-2013 LIBERTY BELL CHAPTER BOARD OF DIRECTORS

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