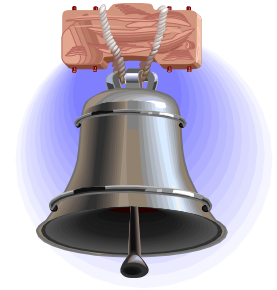




Poor Richard's ARMA n a c



T H E O F F I C I A L N E W S L E T T E R O F T H E
A R M A L I B E R T Y B E L L C H A P T E R

**Join Us For Our Final Chapter Meeting
Of The 2009-2010 Season**

"Tour of the Archives of the Independence Seaport Museum"

**Independence Seaport Museum
211 South Columbus Boulevard
Philadelphia, PA 19106-3199**

Thursday, May 13, 2010

1pm-2pm	Networking and Registrations
2pm-3pm	Tour of the Independence Seaport Museum
3pm-4pm	Presentation

OUR TOPIC:

"Patriot of Two Nations: The agreement to preserve the Barry-Hayes Papers, the heritage of an Irish Catholic hero of the War for Independence and his family"

OUR SPEAKERS:

Darren Poley and Michael Foight of the Falvey Memorial Library, Villanova University

Outreach Librarian Darren G. Poley worked on the negotiations related to establishing a digital partnership agreement with Independence Seaport Museum for the project and coordinated the signing ceremony at Falvey Memorial Library, May 13, 2009.

Michael Foight, Special Collections and Digital Library Coordinator, is the team leader for all digital partnership projects signed by the Library and is in charge of all operations of Villanova University's digital library.

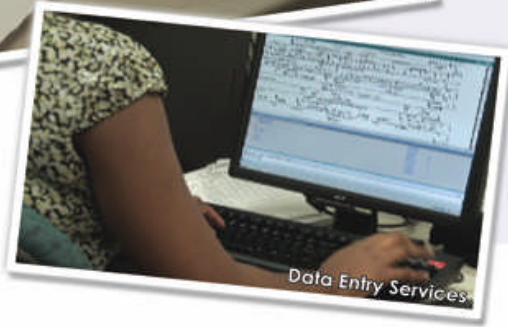
www.armalb.org for all registration and event details



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<i>Table of Contents</i>	
Presidents Message	4
Help Wanted - Chapter Support Positions	6
<ul style="list-style-type: none"> • Program Director • Newsletter Editor • Advertising Manager 	
CRM Corner - By Pete Casey, CRM	8
Ask The CRM - By Bob Dalton, CRM	10-11
Walkin' the Walk, Talkin' the Talk Terms and Definitions	12-13
2009-2010 Liberty Bell Chapter of ARMA Meeting Schedule	14

The Presidents Message

Hello Chapter Members,

If you weren't there, you missed another AWESOME meeting !!!

Our April meeting was held on "tax day", 4/15/10 at the Williamson Horsham. Even though it wasn't everyone's favorite day, we had the chance to forget about that for a while as Thomas Wicks our speaker, presented "Clinical Trials In Pharmaceuticals". It was an eye opening experience in understanding how clinical trials are developed, tracked, and reported. It's an amazing and well thought out process for how pharmaceuticals are brought to the public. It's not just launching a new product. There's a process that's worked through to make sure that everyone is safe. And we greatly appreciate that !!! For those of you that were not able to attend the presentation, please visit our web site.

May 2010 Meeting

We finish out our 2009/2010 season at the Independence Seaport Museum. We start with a tour of the museum and finish with a review and presentation of the Barry-Hayes Papers. Check out the Chapter web site for all of the meeting and registration details. Hope to see you there.

June 10-12, 2010 Mid-Atlantic Region Leadership Conference

Every year, one of the Chapters in the Mid-Atlantic Region hosts a Leadership Conference. The Liberty Bell Chapter hosted in 2006. This year, it's the Pittsburgh Chapter. While it's true, that the conference is attended by the leaders of the individual chapters (usually those chapter members on your Board of Directors), the conference is open to any member of a Mid-Atlantic Region Chapter. I've learned a lot over the years from attending the Leadership Conferences and would recommend it for any member that would like to network with their peers from other Chapters, participate in the latest leadership training practices, and/or use this conference as a guide to see if you would like to get involved in leadership activities for your own Chapter.

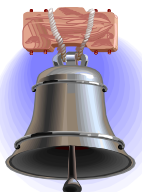
Any member that has an interest in attending, can email me directly. I will forward you the necessary paperwork you'll need to fill out and submit to attend. Join the leaders of your Chapter in Pittsburgh, PA !!!! We'd love to see you there.

The 2010/2011 Season

As we wind down the current season, we immediately begin to plan for the next. Putting together a slate of speakers, topics, and dates is done well in advance. We value your opinion and appreciate the feedback that you have given us in previous years. Shortly you will receive our annual monthly meeting questionnaire. We'll be polling again for the topics you'd like to see us present to you during next season. If you could provide us your thoughts, we would greatly appreciate it.

I look forward to seeing each of you at our events, but as always, if you would like to contact me ... feel free to do so at any time 24/7.

rdavis@thefxorganization



**Ray Davis
President
Liberty Bell Chapter of ARMA**





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HELP WANTED !!!!!

The Liberty Bell Chapter of ARMA has the following volunteer positions open.

We would greatly appreciate the assistance of any Chapter member that would like to contribute their time for the benefit of their fellow members.

Program Director

At the end of the 2009-2010 season, Janice Raphael, our current Program Director will be stepping down. We need someone to fill her shoes !!!

The Program Director assists the Board in developing the season monthly meeting schedule, which includes the speaker, the topic and the location. Also, the Program Director plays an integral role in the annual seminar.

If you would like to be the focal point of our educational offerings to our members please send an email to rdavis@thefxorganization.com for consideration.

Newsletter Editor

We are looking for someone to step into the position of Newsletter Editor for the creation and publication of the Chapter Newsletter. This position has control over the newsletter, from sourcing articles, newsletter layout, and creative design.

If you have a creative side that you'd like to express to the members of your chapter, send an email to rdavis@thefxorganization.com for consideration.

Advertising Manager

We have an opening for someone to assist the Newsletter Editor and Program Director with selling advertising to vendors for our newsletter and annual seminar.

If you like speaking with vendors about the opportunities available to them by advertising with the Chapter, please send an email to rdavis@thefxorganization.com for consideration.



Attention Business Owners and Managers

**Do you have a Records Management Position
that you need to fill ?**

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The Liberty Bell Chapter of ARMA**

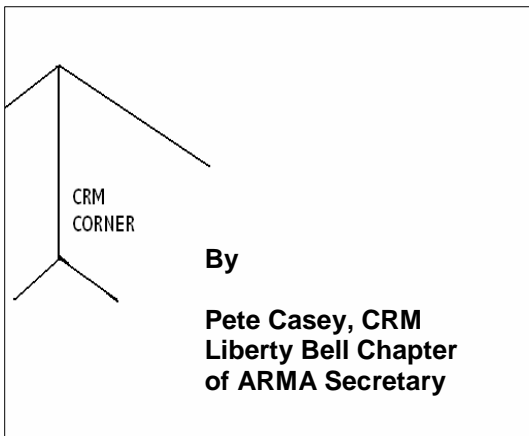
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Contact Ray Davis to post your Job Opportunity

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This month I will show how a good records management textbook will cover many of the topics on the ICRM outline. One textbook that I recommend is Records and Information Management Fundamentals of Professional Practice by William Saffady. Unlike the "Robek" book it remains in print. It can be found on Amazon and the ARMA bookstore

Here is the table of contents for reference:

http://www.arma.org/pdf/Saffady_TOC.pdf

The ARMA Bookstore has also made the first chapter available on their site:

http://www.arma.org/pdf/Saffady_IntroChapter.pdf

Part 4 of the examination: Records Appraisal, Retention, Protection, and Disposition covers many of the core principles of records management. The Saffady book is a great reference for information on developing a records management program.

Below I have matched up the major headings of the ICRM outline for Part 4 of the examination and show a corresponding chapter from the Saffady book. Once again, I must mention that no one book is comprehensive so it would not be wise to study one book and expect to pass the examination. Make sure you review the ICRM Bibliography and seek out different sources for information.

The ARMA Liberty Bell Chapter has many books in its collection that are available to members of the chapter.

Part 4: Records Appraisal, Retention, Protection, and Disposition

- A. Basic Concepts - **Chapter 1 – Introduction** (see link Introchapter.pdf)
- B. Records Inventory - **Chapter 2 - Preparing Retention Schedules I: Inventorying Records**
- C. Records Appraisal - **Chapter 2 - Preparing Retention Schedules I: Inventorying Records**
- D. Retention Schedules - **Chapter 3 - Preparing Retention Schedules II: Making Retention Decisions**
- E. Vital Records Program - **Chapter 6 - Vital Records**
- F. Business Continuity - **Chapter 6 - Vital Records**
- G. Archives - (Chapter 1 makes small mention of archives as an allied discipline, but with a different mission. This is probably why this records management text does not include a chapter regarding archival management)

I encourage you to pursue CRM certification and to participate in the ARMA Liberty Bell Chapter's CRM Study Group held most months before our regularly scheduled chapter meeting.

Remaining CRM Test Dates

Summer 2010

August 2-6, 2010 Parts 1-5

August 5, 2010 Part 6

Fall 2010

November 1-5, 2010 Parts 1-5

November 4, 2010Part 6

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- Bob Dalton, CRM

‘Public Disclosure and Unfunded Mandates’:

Based on a The News Tribune article, 5 January 2010, titled
 “Public Records pest no excuse to limit access”



On November 7th, 2005, I wrote an article for this column titled ;“What are your feelings on the new changes to Chapter 42.17 RCW – Disclosure – Campaign Finances – Lobbying – Records?”, based on a meeting I attended on Open Government sponsored by the Washington State Attorney General's Office for the purpose of:

- Gathering input on best practices for the public disclosure act model rules, and;
- Educate the public on the new public disclosure act law ... and how it helps government officials more effectively comply with requests in a timely manner.

I spoke at this meeting and mentioned that as a taxpayer I found it extremely upsetting at a time when agencies are working with limited budgets the legislature had written another unfunded mandate effecting local government agencies and the changes to the law that made the Public Records Officer responsible for public records requests.

On completion of their fact finding, the legislature created the Public Records Act under RCW 42.56. Like many states, the cost in Washington charged to the requestor is limited to a reasonable fee to cover the cost of copies and use of agency equipment. The new law allows the agency to collect an installment fee (10% of the expected cost) for the anticipated cost of documents to be copied. There is absolutely no reimbursement for the required time of the staff conducting the search and retrieval of the documents.

I have two problems with the law as it was written:

1. The law was changed to make the Public Records Officer responsible for public disclosure requests. Previously it made the Public Records Officer the coordinator for public records requests. I'm not a lawyer, but in every management book where authority and responsibility is mentioned, you can't do one without the other. For example, the Attorney General of the State of Washington has designated an individual who is filling an **authorized** position which includes the duties of the Public Records Officer for the Office of the State Attorney General. My guess is that the incumbent does not work directly under the Attorney General, but under a director. I doubt she has the authority to direct and make changes to insure compliance. So she has responsibility without authority. My guess this is probably true in most if not all agencies, local or state, in any state within the United States. It is in my opinion a bad law and unfair on the person filling the position, as they may be held responsible under law for something they have no control over.
2. The cost of providing public records needs to be addressed to insure that government agencies are not being burdened with costs originating in the state legislature. The State of Washington has a law that precludes unfunded mandates as follows:

“The people of Washington State have established a restriction on the financial burdens placed on local government by state directives. The fundamental purpose of the prohibition on what have been popularly referred to as “unfunded mandates” is expressed in RCW 43.135.010(4): “It is therefore the intent of this chapter to: . . . (c) Assure that the state does not impose responsibility on local governments for new programs or increased levels of service under existing programs unless the costs thereof are paid by the state;. . .” This general intent has been implemented through specific statutory prohibition in RCW 43.135.060(1) which provides:

After July 1, 1995, the legislature shall not impose responsibility for new programs or increased levels of service under existing programs on any political subdivision of the state unless the subdivision is fully reimbursed by specific appropriation by the state for the cost of the new programs or increases in service levels. Reimbursement by the state may be made by: (a) A specific appropriation; or (b) increases in state distributions of revenue to political subdivisions occurring after January 1, 1998”.

Apparently it is another law that no one pays attention to. But as a taxpayer I have serious concerns on the cost and potential abuse of the program to the detriment of the public. I image this cost problem effects every government agency throughout the United States.

In addition, the legislature also created and directed the Attorney General of the State of Washington the Public Records Act Model Rules as reflected in WAC 44-14. The legislature also granted the Attorney General authority to revise the Model Rules.

Having been granted the authority and producing the Model Rules, the Attorney General then proceeded to make the rules non-binding on any agency. While the rules do provide good guidance, it perplexes the writer, why they would leave a loop-hole in the rules. However, if I was a lawyer, which I am not, in litigation with a local government agency, I believe I would use the model rules to point out to a judge that the State of Washington has produced a law, although not binding, that the agency ignored.

My guess is that few local government agencies in any state in the union have a dedicated Public Records Officer on their payroll. If they have a Public Records Officer or Records Manager, it may be part of their duties, but probably originally only supposed to be a small part of their duties that has grown and devoured their time from the job they were hired to do. It should be noted that some local government agencies within the State of Washington have been forced, based on the burden of responding to requests, to add a Public Records Officer just to manage ever-increasing volume of public records requests. I recommended at the meeting that they do a study of the requests by cities within the state to determine the actual cost of the program with complying with requests and the effect on the agencies.

One of the things that I have noted in news articles on the records management listserv is the number of apparent requests and need for litigation to receive information under “public records acts” in the State of Washington and other states. I believe it has shown, as was some of the testimony at the forum, that there is an apparent need to insure that the public agencies are aware of the requirements of the laws. However, in our state, it appears, based on litigations involving public records requests and newspapers and other news media; there is still a need for training on the model rules at all levels of government to insure compliance. But, and a big but, the new law still doesn’t appear to address my concerns as follows:

1. The cost is still on the local agency in violation of RCW 43.135.010(4).
2. The proposed model act is non-binding.
3. If the agency does not comply with a request, the requestor must sue the agency at their expense and hope to get their legal fees paid by the agency.

Fortunately, the City of Lakewood, Washington, with the backing of Association of Washington Cities, is working on legislation that would reduce the financial and staffing burden to the city by restricting excess usage provided in the current law and increase fees to recover some actual costs associated with the public records request.

Bob Dalton, CRM of Dalton Consulting

Note: My thanks to editor, Barbara Werelius, Records Manager and Guru at Tacoma Public Utilities, and a member of the Puget Sound Chapter of ARMA for her assistance in the development of this article. Other articles by Mr. Dalton can be reviewed and copied at his BLOG site: askthecrm.blogspot.com

Terms and Definitions

Walkin' the Walk-n-Talkin' The Talk

Every Industry has their own special language. Records and Information Management is no different. Each month we'll bring you words from the world of Records and Information Management that will be helpful for you to know.

Reading an article ?? Understand the terms !!

Going for your CRM ?? Understand the terms !!

Signing a contract ?? You BETTER understand the terms !!



File Conversion

1. The process of changing the form, medium, or technological context of a record.
2. The process of changing legacy documents and records from one format, storage media, application, and/or system to another.

File Guide

A separation device that denotes a section of a file and directs the user to that section quickly.

File Integrity

1. Being accurate, complete, and in original order.
2. Being free of corruption.

File Maintenance

The activity of preserving the integrity and/or maintaining the currency of a file by reviewing, deleting duplicates, and/or adding information.

File Plan

A classification scheme describing different types of files maintained in an office, how they are identified, where they should be store, how they should be indexed for retrieval, and a reference to the approved disposition for each file.

Files Management

A method utilizing the application of records management principles and techniques to organize and maintain documents properly, in order to ensure efficient and economical operations.

Fiscal Value

The worth of records for the conduct of current or future financial business and/or evidence thereof.

Floor Load

The capacity of a floor area to support a given weight expressed in terms of weight per unit of area.

Floor Space Ratio

The filing capacity expressed in cubic volume of records per square unit of floor space.

Footprint

The two-dimensional space that any device, equipment, cabinet, or structure occupies or utilizes on a surface.

(Continued from page 12)

Freedom of Information Act

1. A U.S. Federal Law created to ensure public access to government records.
2. A term commonly used to refer to this type of legislation.

Full Text Search

The ability of a system to provide search and retrieval of documents based on a search of the complete text within the documents, not just on keywords.

Fumigation

The process of exposing records to a poisonous vapor to destroy insects, mold, mildew, and other destructive biological infestations.

Functional Records Schedule

Schedules that categorize records series by the business function to which they pertain rather than by the program units where they are maintained.

Gateway

Computer hardware and/or software configured to interface between networks that use different protocols.

Generation

The degree of remoteness of a copy, usually photographic, from the original. Subsequent generations can incur degradation of the image.

Hierarchical Data Model

The organization of files based on relationships established along progressive levels of a tree structure or hierarchy.

Historical Value

The determination that records possess value in documenting the history of an organization and are thus worthy of permanent preservation.

Hot Site

An alternate Facility that has the equipment and resources to immediately recover the business functions affected by the occurrence of a disaster.

Hybrid System

A system that contains mixed components of other systems, for example, a system that employs both analog and digital techniques.

Indirect Entry

A principle of indexing wherein headings are incorporated under a hierarchical structure leading from broad to specific concepts.

Information

Data that has been given value through analysis, interpretation, or compilation in a meaningful form.

Integrity (of a record)

The quality of being whole and unaltered from loss, tampering, or corruption.

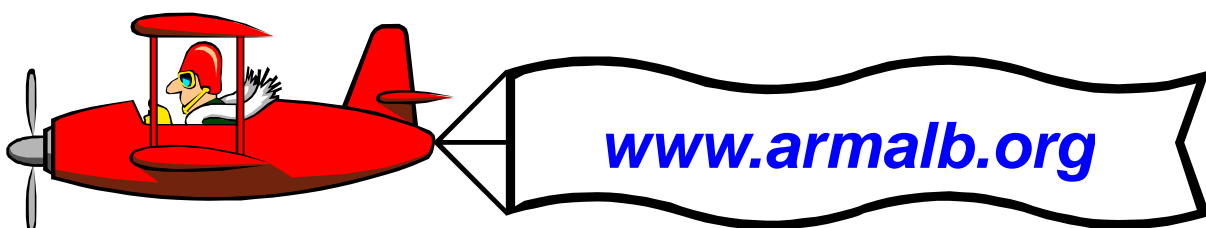
Intellectual Property

An idea, secret, mark, or expression that has property rights created through intellectual and/or discovery efforts of a creator and that are generally protectable under patent, trademark, copyright, or other law.

The source of all terms and definitions on page 12 and 13 of this newsletter have come from ... Glossary of Records and Information Management Terms - 3rd Edition ... from ARMA International.

Liberty Bell Chapter of ARMA 2009-2010 Meeting Schedule

Date	Topic	Speaker	Coordinator
<p><u>January 14, 2010</u></p> <p>Williamson Horsham 500 Blair Mill Road Horsham, PA 19044</p>	<p>Disaster Recovery And Physical Restoration</p>	<p>Jamie Moore</p>	<p>Janice Raphael</p>
<p><u>February 4, 2010</u></p> <p>Holiday Inn 4th & Arch Streets Philadelphia, PA 19103</p>	<p>Annual Seminar Protecting Your Identity</p>	<p>Jeff Lanza</p>	<p>Janice Raphael</p>
<p><u>March 18, 2010</u></p> <p>Holiday Inn 4th & Arch Streets Philadelphia, PA 19103</p>	<p>Issues & Approaches in Electronic Records</p>	<p>Galina Datskovsky PHD, CRM</p>	<p>Bernie Lasoski</p>
<p><u>April 15, 2010</u></p> <p>Williamson Horsham 500 Blair Mill Road Horsham, PA 19044</p>	<p>Solutions To Meet Global Requirements For Public Data Disclosure of Clinical Trials In Pharmaceuticals</p>	<p>Thomas Wicks</p>	<p>Eileen Reader</p>
<p><u>May 13, 2010</u></p> <p>Holiday Inn 4th & Arch Streets Philadelphia, PA 19103</p>	<p>Tour of the Archives of the Independence Seaport Museum</p> <p>Our Topic: "Patriot of two nations: the agreement to preserve the Barry-Hayes Papers, the heritage of an Irish Catholic hero of the War for Independence and his family"</p>	<p>Darren Poley And Michael Foight</p>	<p>Pete Casey</p>
<p><u>July 2010</u></p>	<p>July Planning Meeting For the 2010-2011 Season</p>	<p>TBD</p>	





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Poor Richard's ARMANac

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