



August 2017

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Welcome to the 2017-2018 Year!

To those of you joining your chapter board for the first time, welcome, and thank you for joining this group of volunteers who powers our association. For those returning to your chapter board – Thank You! We are going to have a great year together.

As the new chapter year begins, we want to make sure you have information on resources that are available to you as a chapter leader.

The first resource is this newsletter – *Chapter Connections*. This monthly resource helps you stay on top of what is going on at ARMA. It will have information about chapter-specific resources, programs, and deadlines, along with upcoming ARMA International events, ways for your chapter members to be involved at an international level, and other information important for you as a chapter leader. For example, check out the articles below on conducting an annual financial review and updating your parliamentary procedure skills for chapter meetings.

Second is our [Chapter Central website](#). This website has specific information to help you do the job you have volunteered for. For example, there are resources to help you plan educational events, recruit new members, or manage your chapter's finances. There is also an archive of past *Chapter Connections* articles which can help chapter leaders in their roles. And the front page has a list of upcoming chapter-related deadlines. Check there to make sure you know what is coming up.

Third, each chapter is part of a geographical region. Each region has a team of volunteers who have been in your shoes and are extremely helpful for you in your role. If you need assistance in reaching your region team, chapters@armaintl.org is able to help.

Kind regards,
Heather Lehman, CAE
Region & Chapter Manager
ARMA International



Leadership Corner

Becoming a leader takes more than just reading about it in a book. It requires time on the job, and serving as a chapter leader is a great way to learn and hone these skills. To support you in this, we have introduced this Leadership Corner, where we will feature brief podcasts or videos on a variety of leadership topics we think you will find useful. [Please e-mail](#) us to pass on suggestions for content to include here.

This month we are emphasizing the importance of consistent communications with leaders throughout all chapters, especially at the beginning of this chapter year. While [this ARMA International update video](#) was shown at each of the Region Leadership Conferences this summer, approximately 70% of our leaders are unable to attend these events. Please share with your fellow chapter leaders and members.

Volunteer Opportunities

ARMA Welcome Team – “Micro” Volunteer Opportunity

Do you know someone who loves to talk the ARMA talk or who is looking for a small way to volunteer with ARMA? We are looking for current members to make welcoming phone calls to new members of our community. It's an effective way for ARMA to make a positive first impression and to answer any questions new members might have.

Joining our new ARMA Welcome Team is ideal for those who'd like to volunteer for the association but who have a small amount of time to give. The commitment is less than an hour a month, but the impact will be significant and long-lasting. Volunteers will also gain a richer peer network because every new member brings unique skills and experiences to the community. For more information, [click here](#).

Please contact [Chrissy Bagby](#) if you have questions.

ARMA International Conference in Orlando

Welcome New Conference Attendees in the Conference Mentorship Program

Written By: Megan Zhao, Manager of Conference & Events, ARMA International

As conference hotel staff prepares for the arrival of the ARMA Live! conference, I am consistently asked to describe what our event and our attendees are like. My answer is always the same. We have three days packed full of education with the environment of a family reunion. Each year I've been at an ARMA Live! conference, I've seen members greet each other with such warmth and recognition, I would guess that they've spent holidays and birthday parties together. It's an amazing and truly delightful experience.



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However, every year, a significant portion of conference participants are brand new. While some may have colleagues, many don't know anyone else. If you are coming to conference this year, please consider sharing a little bit of your time to welcome someone into the family. If you complete this survey by September 12, we will introduce you to a new conference participant by September 18. All we ask is that you make a little time before conference to answer any questions they might have, and then to show them around and help them make connections at conference. It's a great group to be a part of and we want to make sure that everyone has the chance to feel welcomed.

If you have any questions, please reach out to [Megan Zhao](#), Conference Manager.

Don't Miss Out on ARMA Live! 2017 In Orlando

The pace of registrations for ARMA Live! 2017 has been great so far – and if you haven't registered, we encourage you to do so. Invest in your career and your organization by spending a few days among your peers from around the world and learning from sessions that were carefully vetted by professionals like you. The theme “Agents of Change” reflects the cutting-edge topics that will be discussed and debated there. If you haven't already – visit our [conference site](#) to register today. Last year's event was rated highly across the board by attendees, and this year there are many exciting new things in store, such as the Hall of Regions, the Saturday Night Party, and the Career Resource Center. We hope to see you there!

The Power of the ARMA Live!

**Written By: Amy Van Artsdalen, IGP, CRM
Golden Gate Chapter Webmaster**

Attending the ARMA Live! conference is one of the main reasons I love the profession. The excitement of hearing top-notch keynote speakers, meeting new members and chapter leaders, and connecting with longtime friends builds relationships that might not occur anywhere else.

I remember one of the first conferences I attended – I was new and very nervous. During one of the sessions the presenter asked for volunteers to stand up and talk about their records team, and most people were hesitant to do so. So I stood up and introduced myself. I told attendees why I was there; I had started a new job at a company that was very familiar to most people in the audience, and I expressed my concerns. After that initial session I walked away with a fist full of business cards from people that told me to call them anytime I had any questions. I felt I had support from other professionals!! Now, each time I attend conference I try to give back as much as I receive.

ARMA members and chapter leaders will tell you about their experiences and are willing to share their knowledge whether it's during a local chapter meeting or the live conference itself. However, during



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conference it seems we are more focused on what is important as RIM/IG professionals – the latest trends in the industry, whether technology-focused or a complex legal issue. We're ready to talk and we're ready to listen. If you haven't been to a conference before I would urge you to attend – develop relationships within your industry and among other chapter leaders. Doing so will help you in your career and greatly benefit your chapter and organization in tangible ways.

Information for Chapter Leaders

Update on our Brand Refresh Efforts

As you may recall, in the July issue of *Chapter Connects*, we informed you of our outreach to chapter leaders to obtain initial feedback on our brand refresh efforts. We can always count on our volunteers and leaders to give us their opinions, and they did not disappoint. We learned that there was definitely a mixed reaction to the creative being designed (updated logo and website look and feel). In fact, the voting was almost 50/50 in favor of the direction and not in favor. While we would never expect a unanimous positive vote, we definitely want a clear majority of our leaders approving the direction we are taking.

Therefore, our board of directors together with HQ made the decision to take more time to explore a brand refresh. However, our new website will debut in 2017 and will include a new look (under existing brand guidelines) and increased functionality.

We will continue to keep you updated as we take this journey together to update our brand.

Chapter Website Hosting - Help Us Decide!

Over the few last months, ARMA International has been asked by a few chapters if we have a website-hosting option for our chapters. We are currently considering what we might provide and what those website requirements should be. Help us in this process by taking a minute to answer this [three-question survey](#).



Coming Soon!

Strategic Planning

By next month, we will post a video on *Chapter Central* in which CEO Jocelyn Gunter walks through ARMA's strategic planning process and provides tips on how to successfully implement a strategic plan with your own chapter. Offered by request, this will be an extension of a portion of the presentation given at the RLCs.

ARMA Update Video - From CEO Jocelyn Gunter

In September, you will receive a short video message from CEO Jocelyn Gunter. This message, sent to all volunteers across the association, will be a news update on the latest at ARMA International. The purpose of this new video message, which will be sent quarterly, is to create stronger alignment and to streamline communication to those who power our association and who serve as ambassadors for our profession. We hope it empowers you to more thoroughly and quickly connect with ARMA and speak about the organization with a united voice.

Community Calls

In the near future, ARMA will be offering a series of live, online-based chats. These chats will be a deep dive on a chapter-specific topic and will feature two or three chapter leaders sharing their successes. Attendees will be able to ask questions and crowd source solutions. More information will be delivered directly to your inbox!



Chapter Operations Article

Conducting an Annual Financial Review for your ARMA Chapter

By: Ed A Sturgeon, CRM

Metro Wastewater Reclamation District
Mile-High Denver Chapter of ARMA

The Mile-High Denver Chapter of ARMA conducts a financial review every year to validate the financial processes utilized and to assess the overall financial status and growth of the chapter. Unlike a financial audit where the concern focuses on the financial statements only, a financial review is also concerned with the development and growth of the chapter. The financial review is outlined below explaining The Players, The Process, and The Product.



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The Players:

Although the positions will vary within your chapter, the Mile-High Denver Chapter utilizes the position of treasurer to spearhead and coordinate the annual financial review. The treasurer keeps all of the financial records for the chapter and sets up the meeting to conduct the review of the previous chapter year sometime in July or August of the current year. The chairman of the board, president, president elect and/or vice president are asked to participate with the review. Additionally, two non-board members are chosen to participate with the review. The Mile-High Denver Chapter seems to have new board members each year, so we utilize the new incoming board members to assist with the review for the previous year as they were regular members the year before.

The Process:

The process, as identified in the steps below, is very thorough, covering every transaction that involves the chapter. Using the chapter's monthly treasurer's reports, income forms, bank statements, PayPal information, ARMA chapter escrow reports, and other detailed backup material, an evaluation of expenses and income for the previous chapter year is tracked from receipt to payment or deposit.

1. All treasurer reports, income forms, bank statements, disbursement authorization forms, and PayPal screenshots are correlated and examined by month.
2. Each monthly folder is reviewed and reconciled by at least two people. The transactions are reviewed line item by line item, receipts and detailed documentation are verified, and the transaction is verified on the bank statement.
3. Once a transaction is identified and reviewed, a checkmark and initials are placed next to the transaction to indicate that the transaction is verified.
4. All treasurer reports and income forms are verified for completeness, accuracy, and signatures or initials by authorized board members.
5. Receipts and disbursement authorization forms are verified for completeness, accuracy, and signatures by authorized board members.
6. Any missing information is verified and recorded appropriately for each month.
7. Issues and discrepancies are investigated and resolved by the acting treasurer.

The Product:

Once any issues and discrepancies are resolved, the treasurer prepares a draft report which includes all of the findings during the review. The report is then reviewed and finalized by the group, and each board member who participated in the review process signs the report. The report is filed with the other financial records for the chapter year.

By completing a financial review regularly, you can catch accounting mistakes and make any necessary corrections. The report that is produced gives your chapter a better idea of where it stands



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financially and identifies if any budgeting corrections need to be made for the next chapter year. It also assists your board members to plan accordingly for the next chapter year.



Chapter Operations Article

Parliamentary Procedure and Roberts Rules of Order

By: Liz Icenogle, CAE

Director of Strategic Relations
ARMA International

As you begin this new chapter year, you may benefit from revisiting your board's meeting procedures. Based on conversations at the region leadership conferences and requests received by the Region and Chapter team, we've curated a few helpful resources on parliamentary procedure and Roberts Rules of Order.

Have 15 minutes? Your first stop should be this video: [Parliamentary Procedure - A Practical Overview](#).

- This video, provided by a University extension, is one of the better one-stop shop video resources we've seen. *Please note: minutes 1 thru 2 of the presentation reference a law specific to the U.S. state of Missouri. You should skip this.*

[Procedure Cheat Sheet](#)

- From the National Association of Parliamentarians, these two pages can be a reference for your entire board. Print and provide to each member.

Have 3 minutes? This short video on [The Basics of Making a Motion](#) provides quick and useful information about putting these procedures in action.

- The Just-in-time Learning Series offers a series of one-to-four minute videos on running effective meetings. Perfect for you the busy leader or to show one or two during a board meeting.

Additional resources on meeting procedure, agendas, and minutes can be found on the [Secretary Resources page](#) on Chapter Central.



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Chapter at Work:

September 2017 Preview

Arizona Chapter

The AZ ARMA Chapter has just finished a busy and enjoyable year of activities, outreach, and service! We've updated our communication by launching a new StarChapter website to coordinate and share information.

Outreach and initiatives to bring new members into the fold were areas of focus. We took ARMA AZ Road Show to Southern Arizona. We are a proud partner of St. Mary's Food Bank and conducted a raffle to benefit them at each chapter meeting, and participated in a Volunteer Day.

During our Spring Seminar, we grew membership and involvement by raffling off annual passes for a member, non-member, and student, as well as an ARMA membership. Making the member experience meaningful and fun is important to us – to that end we held an award ceremony that included Member of the Year, Most Active Chapter Member, among many others!

Future Chapter Connections

If you would like to submit an item for the upcoming *Chapter Connection*, please e-mail the information to [Chapter Service Team](#) no later than noon (CDT) Monday, September 17th.