



Volume May-June 2017

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Evaluating Your Chapter Programs & Meetings

As the end of the fiscal year quickly approaches, many chapters are looking back at what they accomplished over the last year. What programs gained attention? Which ones created a lot of discussion? Which programs were well attended and which were not?

As we approach summer and many of you begin to plan next year's chapter meetings and programs, it is important first to evaluate the ending year's programs to determine what bears repeating and where you might need to change course.

As Einstein is often quoted as saying, "Insanity is doing the same thing over and over again and expecting different results," so let's not fall into that trap.

Many of you have made S.M.A.R.T. chapter goals, but now is the time to evaluate and revise them to make them S.M.A.R.T.E.R. This calls not only for them to be Specific, Measurable, Attainable, Relevant, and Time-Specific, but also for them to be Evaluated and Revised, as needed.

For more information on S.M.A.R.T.E.R. goals, [see this article](#).

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 let us know whether you enjoy this new feature and to pass on suggestions for content to include here.

This month, we have [a checklist](#) from the OREA Center for Leadership Development to help your chapter evaluate your chapter meetings and education sessions.

New Operations E-Handbook Sneak Peek – Calling Volunteers

Here at HQ we are working to revise the Chapter Operations E-Handbook platform and pages. As we complete this process, we are looking for a few volunteers who want a sneak peek at this revised tool and will let us know what they think. Your help to let us know if something helpful that was previously in the handbook is missing or if you need additional information on some topics will be valuable.

Volunteers will need to be able to review and provide feedback about the handbook between June 19 and June 23. To volunteer for this, please e-mail us at chapters@armaintl.org.

The new tool will launch July 1!

The revised e-handbook page and platform are part of our first phase of evaluating and revamping chapter support. Phase 2 will entail asking many volunteers to comprehensively review our volunteer resources over a longer period. We'll have more information about this effort by fall.

Region Leadership Conference Registration Open

Registration is now open for all U.S. Region Leadership Conferences:

Great Northwest & Pacific	Seattle, WA	July 7-8
Southeast & Southwest	New Orleans, LA	July 7-9
Great Lakes & Midwest Rocky Mtn.	St. Louis MO	July 21-22
Mid-Atlantic & Northeast	Fairfax, VA	July 21-22

Hotel deadlines are quickly approaching! The links above have information on each site's hotel deadlines. Don't miss out!



2018 U.S. RLC Planning

Planning for the 2018 U.S. region leadership conference is in progress. Alongside a working group of region and chapter leaders, we are reconsidering the format for these events. After receiving feedback from regions leaders, we knew it was necessary to give next year's conferences some additional thought.

This effort kicked off in May with our region directors and a working group formed based on feedback from the region teams. This working group is evaluating the possible options and is doing so quickly. We know time is of the essence. U.S. chapter leaders be on the lookout for a survey on this topic. We will provide updates as we can.

Awards Deadline Is July 1

Time is running out! Make sure your chapter has applied for the new ARMA International awards. Online applications for the awards are available on [this page](#). Application deadline is July 1. If you have any questions, please send them to awards@armaintl.org.

Awards Application Review Volunteers Needed

The Awards Committee is looking for volunteers to help review awards applications to make sure they meet the required criteria. There are also two award categories for which judges are needed. If you are interested in assisting with this, please e-mail Heather Lehman at heather.lehman@armaintl.org.

Other Chapters Need Your Help! Submit for the Speaker Database

Now that the chapter year is coming to a close, would you consider contributing to the speaker database? You've told us a reference guide like this can be a powerful tool for your chapter's planning, and we want to make sure the database fulfills its potential. It can only be a useful tool if chapters continue to contribute.

We are accepting the names and contact information for speakers you would recommend or for presenters who would like chapters to know they are willing to present at chapter meetings. The process is simple. Fill out [this online form](#) to submit the information. The spreadsheet is updated monthly and is available on the e-Handbook site.

Chapter Update Form Is Due Aug. 1

It is the time of year where new officers are elected. Make sure to let headquarters know who your new chapter leaders are by completing the [Chapter Update Form](#). This form helps both headquarters and



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your region know who is supporting your chapter and with whom to communicate. The form is due August 1, so don't delay! If you already have the information, please send it!

Fraud Warning

Last month, one of our chapters was the target of an e-mail scheme that sought to defraud the chapter. Unfortunately, such a scheme is not uncommon within associations.

As chapter leaders, especially if your chapters publish your names and contact information on their websites, you are vulnerable to these attacks. Criminals use the shared contact information as the vehicle to power the fraudulent action with the hope that the familiarity will shadow the scheme. Avoid becoming a victim with simple actions that include a mix of using common sense and ensuring safeguards are in place.

These attacks typically contain the following elements:

1. **A spoofed e-mail address from a fellow board member.** For example, you may receive an e-mail from Heather.Lehman@armaintl.org or Heather.Lehman@mixxtapes.org. (The address after @ looks suspect or random!)
2. **The body of the e-mail is personalized to you** and may reference the chapter or ARMA International.
3. **A link or an attachment you are asked to open.** It *may* have a financial element. For example, it may say "Pay Invoice Now" or "Execute Wire Transfer."
4. **A request to approve a wire transfer.**

How to prevent the scam:

1. Use common sense. These e-mails typically feel out of the ordinary and a little "off." If the context doesn't make sense to you, question it:
 - Check with the purported sender in **a new and separate e-mail to that person's known e-mail address.**
 - **Never forward the initial e-mail.**
 - **Don't open attachments or click on links.**
2. Review your chapter's financial policies to make sure there are safeguards in place when making payments or wire transfers:
 - Distribute the policies to all board members so everyone understands what the process looks like (and doesn't look like!).
 - Be especially vigilant when it comes to wire transfers and have a process in place. These attempts to defraud typically involve the president or treasurer and ask for approval or actual transfer of money.



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These attacks are not typically sophisticated – just tricky. The criminals try to take advantage of individuals who aren't paying close attention. Being vigilant with your e-mail will help prevent your chapter from becoming a victim.

Chapter Connections Library

Have you missed one of the wonderful articles written by ARMA's great volunteers? All the past articles from the Chapter Connections have been gathered together into a new library. See the various topics we have discussed throughout the last year by [clicking here!](#)



Chapter Advisor Article

Starting a New Leadership Position

By Mark Graves, Midwest Rocky Mountain Region, Chapter Advisor of Membership and Marketing

Starting a new chapter leadership position can be exciting, but it can also be frightening. Imagine you're the chapter's new communications coordinator. Today is the chapter meeting and you need to send an important update to attendees with parking instructions. You attempt to access the chapter's website to get the attendee list, but you're getting a "404 - Page not found" error. What do you do? Who can you call for help?

Unfortunately, situations like this are common when transitioning positions. Despite good intentions, chapter leaders often neglect to provide adequate information and training to help their successor succeed in their new position. However, we can help new leaders put their best foot forward by providing a few simple aids

Write an operations guide. The guide does not need to be fancy or complicated. Think back to the tasks you completed throughout the year and document them. Is something due at the end of September? Great! Document it, so they have a reminder. Do you have a monthly or weekly task that needs to be done? Great! Document that, too. Provide any resources that will help them do their job.

Hold a transition meeting. Get together in person (or over the phone if an in-person meeting isn't feasible) and review the operations guide. Work together to perform some of the tasks in the list, especially those that are more technical or hard to describe. Answer questions and incorporate them



into the guide. Encourage them to add their own information and ideas into the guide so they can pass it along at the end of their term.

Be available. The new leader is sure to have questions, especially if he or she is new to chapter leadership. Be available as best as possible to provide coaching as your successor embarks on a new journey.



Chapter Advisor Article

Welcome New Members – Wait Where Did They Go?

By: Charles S. Sodano, Ph.D., Pacific Region, Chapter Advisor of Membership & Marketing

Most professionals are not that interested in joining a professional group until they have reached a certain job and/or financial status. This often occurs between the ages of 30 and 40. The impetus to join is driven by the desire to make better business contacts for future positions and update their knowledge quickly via those who have better perceived connections. This target group should be one to focus on.

There are a lot of [tools and technique](#) to use when looking for new member prospects in all the right places to increase chapter membership substantially. But, have you noticed that after a year, something like 30% of the new members do not reup. Why? Let's take a look.

We've all taken a chance on a new restaurant, perhaps picking one at random or relying on a recommendation by a friend. What factors influenced a repeat visit? Was it the quality of the food; the ambiance; the price; the service?

Joining / leaving an ARMA chapter can be very similar. Let's have a look at the factors that could influence this decision.

Review Reasons to Renew Chapter Membership

Price – The annual fee to join a chapter is reasonable and my organization didn't mind picking up the increase over the general membership fee. The price of event tickets was affordable and meals were usually included.

Quality – I've met a few new people who turned out to be great business contacts or heard a presentation that either helped fill in a few gaps in my knowledge or gave me some new ideas.



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Ambiance – The members, some my age, went out of their way to make me feel welcome and comfortable. I felt wanted and part of their community.

Service – Meetings were held at a convenient time and place. The members and speakers either answered my questions or promised to find me someone who could. And they usually did.

Review Reasons for Not Renewing Chapter Membership

Price - My employer does not reimburse me for ARMA dues and the additional charge for chapter membership, including travel to meetings and associated meals, is not worth it.

Quality – The chapter programs and resources were not very helpful. They either pertained to a subject of low importance to me or were not advanced enough (or too complex).

Ambiance – The members are somewhat aloof or clannish and older. I didn't seem to fit in and could have stayed at work or home and watched a webinar instead.

Service – Chapter meetings are held at an inconvenient location or time. I couldn't fit them into my schedule. Registration and/or fee payment was tedious.

It's unlikely that you will be able to convince the non-renewals to sign up again soon. The best you can hope for is that they may attend a future event that appeals to them.

View Potential Members from a Family Perspective

Since the mean age of current ARMA members is 59, the prime target group (30- to 40-year-olds) is around the age of most members' children. Rather than studying the published traits of millennials, looking at your chapter like your children (or nieces and nephews) would will provide an interesting perspective and insights you can apply to member recruitment.

Consider whether your children would join a club that you belong to. Put yourself in their place. Would you have interest in socializing with 80-year-olds? Maybe, if they had key business connections and/or good current knowledge that would help you in your career? Even if so, you would not have the same social relationship with them that you have with your contemporaries.

This is also true of millennials; they are not going to have a social relationship with members of your generation. They are entering a growth phase of their careers and members in your generation are mostly at a career plateau. But, they may be interested in being mentored, not only in the profession but also in becoming a leader. So, consider sending them the credentials of current, professionally successful members with an offer of mentoring as an enticement to join. Our target group of older millennials use electronic communication, so perhaps you can hook them up with potential mentors via social media.



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Don't forget to continue looking at your chapter through their perspective and mentoring them after they join. Their generation's company loyalty, as well as association loyalty, is low. If they don't get a good return for their time and money, they will move on.



Member Spotlight:

June 2017

[Meet Kathleen Smith, IGP, CRM, CIP, CIPP](#)

Rome Williams recently nominated Kathleen Smith for the Member Spotlight.

"If I had to nominate someone for Member Spotlight, it would be Kathleen Smith, CIP, CIPP, CRM, IGP, of the Bellevue Eastside Chapter in Washington State. She hired me as a temp to work for her in a dark and dreary records warehouse some ten years ago. She also helped me get hired on full time and greatly encouraged me to see the glass half full and go after my CRM, which I did. If not for her, I wouldn't be where I am today."

Rome Williams, CRM
Records program manager
Community Transit

Smith is a great fit for the Member Spotlight, an honor meant to recognize members' involvement within the profession [to read more click here](#).

Farewell to Member Spotlight

This is the last installment of Member Spotlight. We're planning a variety of new ways to highlight members, their accomplishments, and their advice for professional advancement. Our first step is the "Notable Pros" feature appearing in alternating issues of *Information Management* magazine. Check out our profile of Alison North, FAI, FIRMS, called "[A Passion for the Profession](#)," which appeared in the March/April issue. Next up is a profile of Susan Goodman, FAI, which will appear in the July/August issue to be published soon. Then watch this space for announcements of other ways we will help members connect and learn from each other.

Future Chapter Connections

If you would like to submit an item for the upcoming *Chapter Connection*, please e-mail the information to [Member Services](#) no later than noon (CDT) Monday, June 19.