Welcome
Regions Here Today
- Canada
- European
- Great Lakes
- Great Northwest
- Mid-Atlantic
- Midwest/Rocky Mountain
- Northeast
- Pacific
- Southeast
- Southwest
Co-Chairs – Anita Castora, John Spencer, Scottie Swafford

Bill Bradford, Board President

Bill Bradford, President
Jason Stearns, Board President-elect
William Bauer, Chapter Advisor
Anita Castora, Southeast Regional Director
Cindy Chmura, GI Region Chapter Advisor
Jay Janzen, Canada Region Dir of Marketing & Comm
Kamal Kapooor, GL Region Chapter Advisor
Michael Landau, Incoming Treasurer
Ken Oldenburg, Canada Region Chapter Advisor
Dynessa Nordrum, MRM Regional Director
Katie Phelps, Chapter Advisor
Shelby Smith, Canada Region Program Director
Charlie Sodano, Pacific Region Director
Ed Sturgeon, Denver Chapter
Mona Buckley, ARMA CEO
Heather Lehman, Sr. Mgr Membership and Components
Tricia Smith, Executive Director of Engagement

Introductions.

Presenters & Facilitators Today.

• Kick-Off Chapter Year
• Goals for Today
• Build Your Network

Goals for the Event.

Co-Chairs: Anita Castora, John Spencer, Scottie Swafford

Bill Bradford, Board President

How to Participate

• Audio is muted as you came into the webinar.
• There will be a Chat Box for participants to share information and best practices
• Small Group Breakout selection was determined at registration.
• If you have any technical difficulties, submit in the chat area.

Poll Question

Are you a new chapter leader?
- Yes
- No, I am continuing in my position next year
- No, but I am taking on a new position next year
- No, I am an old hat. I have served in multiple positions in the past
Report from the President

- Number of Members & Trend
  - 5790 Members (trends with last year)
  - Average 80% Retention Rate
  - Average 100+ new members monthly

- Number of Chapters
  - 98
  - 701 Chapter Volunteer Leaders
  - 79% of members in a chapter

- Benefits of Membership
  1. Community
  2. Education
  3. Resources, e.g. Job Bank
  4. Creation of Board "Future" Task Force

Associations 101

What is an Association?
A group of people/members who voluntarily come together to solve common problems, meet common needs, and accomplish common goals. Through the assumption that together they can do/accomplish more than one could individually.

A 501(c)6 Not For Profit Corporation "owned" by the members

Associations 101

Non-Profit Corporate Governance

- Federal/State Laws*
- Articles of Incorporation*
- Bylaws*
- Reporting: Financial (Form 990)*
- *set by the Board to guide volunteer groups and management

Legal Duties of a Non-Profit Board

- Duty of Obedience (to the mission, the legal documents)
- Duty of Care (to the members, protection of funds)
- Duty of Loyalty (support all board decisions, participate, represent the brand)

The Association Business Model

- Membership (as an entity or individual)
- Some aspect of the mission and profession’s work, must serve the public (directly or indirectly)
- Core Activity of all Associations:
  1. Education, standards & thought leadership
  2. Information
  3. Community/networking/convening, through:
     a. Conferences & Events
     b. Committees
     c. Special Interest groups
     d. Chapters (approx. 1/3 of national associations)

Legal and Reporting Duties

- Annual Chapter Information and Chapter Board of Directors Change Form
  - Not just chapter officers anymore!
  - Chapter Bylaws
  - Verification of Chapter Dues
  - Information on who should have Admin access for your chapter group
Legal and Reporting Duties

• US Chapters – IRS 990 Form
• Chapters Outside US – Follow local regulations as outlined by your country’s government.
• Informing ARMA International via our Annual Chapter Information and Chapter Board of Directors Form

Events and Education

• Events and Education – Shelly Smith
• Virtual Meetings & Communication – William Basinger
• Membership & Engagement – Dynessa Nordrum
• Business Partners – Ed Sturgeon

Chapter Best Practices and Operations

Co-Chairs: Anita Castora, John Spencer, Scottie Swafford

Events and Education

Learnings from ARMA Canada
Shifting Events and Education to Virtual Environment

Shelly Smith, Conference Program Director
ARMA Canada

Background

• Volunteer: Run conference team
• ARMA Canada InfoCon CAN June 1-3 2020 in Winnipeg - Cancelled
• First focus (before declaration of state of emergency) – Virtual/In-person hybrid, smaller sized conference
• Second focus: – canceling bookings, getting refunds, contacting registrants and sponsors
• Third focus: We need to deliver virtual education event and show our support to the Canadian membership.
• Our challenges: How?
• What we have: An amazing, brilliant, resilient and supportive Community!

Solution

Events
• Sagesse Webinar: May 28, 2020

Capture of Strategy Doc

ARMA Canada 2020: Virtual Events Strategy

Program Schedule
Lessons Learned

Lessons Learned: Need a way for participants to interact. Offer something unique to you.

Chapter Leader Resource on Education Development

What Worked?

Virtual Meetings and Communication

Poll Question

How would you rate your overall chapter leadership experience?

- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied
**Membership and Engagement**

- New Member Toolkit
- Renewal Toolkit
- Groups tools @ARMA.org

Presented by: Dynessa Randrum

---

**Business Partners**

Mile High Denver Chapter of ARMA International

Presented by: Ed Sturgeon, Chairperson (2019-2020)

---

**MHD Website - Business Partner Page**

---

**Business Partner Program**

---

**Business Partner Program**

---

**Business Partners**

*Ed Sturgeon, CRM, CIP*
Mile High Denver Chapter of ARMA
(303) 266-3297
esturgeon@ment4hd.co.us
www.armadenver.org
Take A Break
We’ll see you back here in 15 minutes

ARMA Technology and Resources
What can you get out of ARMA’s Association Management System: YourMembership (YM)?
• Tools and Resources
• Chapter Reports and Membership Information
• Communication with your Chapter Members
• Sharing of files and items with just your chapter members.

Presented By: Heather Lehman and Tricia Smith

YM...It’s not just reports
• Chapter Engagement
• Member Connections
• Industry Groups – Expanded Offerings Coming Soon!

Coming Soon!
Expanded Offering
Industry Groups
We Have:
• Airline, Travel, & Hospitality
• Financial Services
• Government
• Legal
• Manufacturing
• Utilities

On Deck:
• Pharmaceutical
• Energy
• Insurance
• Colleges & Universities
• Professional Services
• More!

Poll Question
Are you using a virtual platform for meetings?
• Yes – Zoom all the way
• Yes – We “borrow” from an employer
• No – Still considering options
• No – Would like assistance

Meeting Technology Best Practices
• What to consider when using a virtual platform
• Virtual Voting
• Connecting “Offline”
• LinkedIn
• Facebook
• YM

Presented By: Heather Lehman and Tricia Smith
Chapter Central

Welcome ARMA Volunteers

How to get there

Chapter Leader Resources

- Professional Leadership Certificate
- Member Toolkits
- Chapter Connections Library
  - Education & Programming
  - Membership & Marketing
  - Operations & Governance

Small Group Breakouts.

- President
- Treasurer
- Membership Director
- Programming/Education
- Vice President/President Elect
- Secretary/Website/Social Media
- Communications/Marketing/Public Relations

Poll Question

How likely are you to recommend future volunteer opportunities to other ARMA members?

1. Very likely
2. Likely
3. Somewhat likely
4. Unlikely
5. Very unlikely

Reminder of goals of the day – take one thing and implement
- Share the ideas learned today with other leaders of your chapter
- Update chapter roster within YourMembership

Debrief and Next Steps.

Co-Chairs: Anita Castora, John Spencer, Scottie Swafford

Co-Chairs: Anita Castora, John Spencer, Scottie Swafford

37 38 39 40 41 42
WE'RE HERE TO HELP

Support Advisor  Self-Help Knowledgebase  Continuous Enhancements

OnDemand Board Trainings
Take advantage of our OnDemand board training videos. We know the life of a chapter leader can be hectic, so we've put together these great resources for you to access when it's most convenient.

CONTENT, COMMUNICATIONS, MEMBERSHIP, & MEETINGS

Chapter Succession Planning and Development

How do you start?
Start Small – Focus on Ad Hoc and Micro-Volunteering
Shift Succession Planning to Talent Development
Engaging a new chapter volunteer

Presented By: Bill Bradford

The Year Ahead

ARMA 2020-21 Board of Directors
President – Jason Stearns*; Past President – Bill Bradford*
President-Elect – Michelle Kirk*; Treasurer – Michael Landau*
Directors – John Jablonski*; Wendy McClain*; Tyrene Banda*
* Former and Current Chapter Leader President – Jason Stearns*; Imm. Past President – Bill Bradford*

Mission
To empower the community of information professionals to advance their careers, organizations, and the profession.
Contact Us

ARMAservice@ARMAINTL.ORG