ARMA Canada Leadership Content Management Task Force

May 26 & 27, 2018

Timelines

- **Oct-Nov 2017**: Each Taskforce members complete work on their teams' SMART Goal
- **Dec 2017**: Deadline for each Task Force's 1st Progress Report to be sent to the Steering Committee
- **Jan 2018**: Steering Committee provides each Task Force with any feedback regarding Progress Reports
- **Mar 2018**: Deadline for each Task Force's 2nd Progress Report to be sent to the Steering Committee
- **May 2018**: Steering Committee provides final piece of feedback to Task Forces
- **May 26th, 2018:** Each Task Force presents findings and update at ARMA Region's Leadership Conference

SMART Goal

By Dec15-2017, recommend a content management system that will meet the requirements of the Canada Region Chapters and

Canada Region Team to enable the collaboration, creation, storage and retrieval of information in a secure electronic environment (on premise or in the cloud) at a reasonable cost to each Chapter as a consumer in support of their activities to:

- meet requirements of ARMA Canada Chapters & ARMA Canada Region
- create user communities to build capacity among Chapters; and
- reduce the number of existing disparate content management systems utilized by ARMA Canada Chapters and Canada Region Team

Content Management

	Choice 1st or 2nd
Wikipedia: A content management system (CMS) is a computer application that supports the creation and modification of digital content. It is often used to support multiple users working in a collaborative environment. (https://en.wikipedia.org/wiki/Content_management_system)	
TechTarget: A content management system (CMS) is a software application or set of related programs that are used to create and manage digital content. CMSes are typically used for enterprise content management (ECM) and web content management (WCM). An ECM facilitates collaboration in the workplace by integrating document management, digital asset management and records retention functionalities, and providing end users with role-based access to the organization's digital assets. A WCM facilitates collaborative authoring for websites. ECM software often includes a WCM publishing functionality, but ECM webpages typically remain behind the organization's firewall. http://searchcontentmanagement.techtarget.com/	
AIIM: What is Enterprise Content Management (ECM)? Enterprise Content Management (ECM) is the strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. http://www.aiim.org/Resources/Glossary/Glossary-List-Page Or Enterprise Content Management is the systematic collection and organization of information that is to be used by a designated audience – business executives, customers, etc. Neither a single technology nor a methodology nor a process, it is a dynamic combination of strategies, methods, and tools used to capture, manage, store, preserve, and deliver information supporting key organizational processes through its entire lifecycle. http://www.aiim.org/What-is-ECM-Enterprise-Content-Management#	
ARMA: Content management systems comprise a set of templates, procedures and standard format software that enables marketers and their proxies (e.g. webmasters) to produce and manage text, graphics, pictures, audio and video for use in Web landing pages, blogs, document repositories, campaigns or any marketing activity requiring a single or multimedia content. ARMA Intl, source: Gartner IT Glossary. www.gartner.com/it-glossary	
Society of American Archivists: n. ~ Techniques to set policies and supervise the creation, organization, access, and use of large quantities of information, especially in different formats and applications throughout an organization. https://www2.archivists.org/glossary/terms/c/contentmanagement	

Definition

AIIM: What is Enterprise Content Management (ECM)?

Enterprise Content Management (ECM) is the strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. http://www.aiim.org/Resources/Glossary/Glossary-List-Page

The survey

Question
How does your Chapter organize and maintain chapter records?
Keeps records in hard copy (files/binders)
Stores records electronically i.e. Dropbox, Google Docs, One Drive, iCloud or in another system (please specify)
Stores records electronically on flash drives/external hard drives
Stores records electronically on a Laptop(s)
Combination of the above (please describe)
Other (please specify)
What type of records does your Chapter create, capture and maintain?
By-Laws
Operational Manual/policies/procedures
Board Meeting Agendas, Portfolio Reports and Minutes
Event planning records and photographs
Membership registration records
Other (please specify)
Does your Chapter use a dedicated email account?
If so, who is the service provider?
What is the approximate annual cost per year?
What website service provider does your Chapter use?
What is the approximate annual cost per year?
Does your Chapter have a method to transition information from outgoing to incoming Board members? (i.e. President, Vice-President, Secretary, Treasurer, Education, Marketing etc.)
Is the existing transition method sufficient to meet your Chapters operational needs?
Does your Chapter have an electronic records and information management system?
If so, does your Chapter have unique log-ins to the electronic records and information management system for Board members and/or Chapter members?
What is the annual cost for support and service to operate the system?
Just in case we need to follow up, Your Name and Position:

Recommendation

2017-2018 ARMA Canada Content Management Task Force recommends the following three-part solution for the management of records/content created by ARMA Canada Chapters:

- Governance
- Technology
- Process

Recommended Governance

- Transition to a centralized cloud-based storage solution for Chapter records capture, storage, collaboration and access.

- Adoption of a records classification and retention schedule for the classification/organization of Chapter records. See Attachment 1.

Recommended Technology - Options

- Microsoft OneDrive - https://onedrive.live.com
- Box Document Management - https://www.box.com/home
- Dropbox - https://www.dropbox.com/home Chapter Board records (minutes, agendas, reports, financial records, bylaws, operating manual (policies/procedures), event records (presentations, schedules, venue info, registration, photos and so forth

Solution cost

Software Solution	Base Price	Step Above Base
OneDrive	5 GB Storage Only: Free	Office 365 + 1TB: $8.00 Per Month
Box Document Management	100 GB: $7.00 Per User/Month	Unlimited: $20.00 Per User/Month
DropBox	2GB Storage Only: Free	Plus: $10.75 Per Month

Migration Proces

- Chapter President designate Chapter/Board member to coordinate process of transitioning to one of the electronic solution's.
- Gather existing electronic records into one spot.
- Conduct high level inventory.
- Appraise records (identify duplicates, abandoned drafts etc).
- Organize records.
- Migrate records into one of the recommended solutions.

More tomorrow from the Content Management Task Force

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