

**ARMA 2011 MID-ATLANTIC LEADERSHIP TRAINING CONFERENCE  
CHAPTER REPORT**

**CHAPTER:** Triangle Chapter

**CHAPTER CONTACT INFORMATION:** Bradlee W. Davis, President

**PROGRAMS: (Best in the past year)**

<b>MEETING DATE</b>	<b>TIME OF DAY BRFST/LCH/DNR</b>	<b>ATTENDANCE MEMBER/ NON-MEMBER</b>	<b>PRESENTATION TOPIC/SPEAKER</b>
September 2 <sup>nd</sup>	Lunch – Cardinal Club	Member = 11 Non-Member = 11	Confidentiality in the Workplace: Gail Bisbee – CEO of Confidential Records Management, Inc.
October 7 <sup>th</sup>	Lunch – Maggiano's	Member = 15 Non-Member = 3	Records Management Advisory Teams...Got One? Want One? Need One?: Earl Johnson, Jr. – Corporate Records Manager, Colonial Pipeline
Novmeber 4 <sup>th</sup>	Lunch – Cardinal Club	Member = 11 Non-Member = 12	Top 10 eDiscovery Tips: Doug Moore – VP of Business Development at Nova Office Strategies, Inc.
December 2 <sup>nd</sup>	Lunch – Maggiano's	Member = 22 Non-Member = 15	Managing Records in SharePoint 2010: Cory Peters – Chief SharePoint Architect, Eastridge Technology, Inc.
January 6 <sup>th</sup>	Lunch – Cardinal Club	Member = 16 Non-Member = 8	Secure Email and File Transfer: Ed Cheely – VP of Sales and Marketing for ShareFile
February 4 – 6	Overnight Trip	Member = 11 Non-Member = 10	Triangle Travels Trip to Savannah Georgia
March 3 <sup>rd</sup>	Lunch – Maggiano's	Member = 18 Non-Member = 9	Beyond Paper: Making the Transition to (Nearly) All-digital Recordkeeping: David O Stephens – VP of Records Management Consulting at Zasio Enterprises
April 7 <sup>th</sup>	Lunch – Cardinal Club	Member = 18 Non-Member = 8	Process This: The Role of RIM in BPM: Tera Ladner – VP of Enterprise Records and Information Management at SunTrust Bank
May 5 <sup>th</sup>	Lunch – Cardinal Club	Member = 14 Non-Member = 13	Project Management: Michelle Van Allen – Supervisor of Records Management at Santee Cooper

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**CHAPTER EDUCATION ACTIVITIES:**

<b>SEMINAR</b>	<b>DATE (S) &amp; TIMES</b>	<b>ATTENDANCE MEMBER/ NON-MEMBER</b>	<b>SPEAKER NAME</b>	<b>SPEAKER TOPIC</b>
Triangle Travels to Savannah Georgia	February 4 <sup>th</sup> – 6 <sup>th</sup>	Member = 11 Non-Member = 10		The Triangle Travels trips are a new tradition for our chapter. Following on the heels of a very successful trip to Washington DC where we received a private behind the scenes tour of the home of the Declaration of Independence, we traveled to Savannah Georgia and attended their annual Colonial Faire and Muster and toured some of the fine antebellum mansions.

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**MEMBERSHIP STATISTICS:**

BEGINNING OF THE YEAR	CURRENT	CHAPTER MEMBERSHIP GOAL FOR 2009-2010
59	56	N/A

1. What months constitute your chapter year?  
(i.e. September-June; August-May; year 'round, etc.)  
September - May
  
2. Do you hold your chapter meetings on a routine day of the month?  Yes  No  
If yes, which day? (i.e. second Tuesday of each month, etc.)  
If no, how does your chapter know when to meet?  
First Thursday of each month that we hold meetings.

**OTHER**

1. **Chapter Member Involvement.** Please list some of your promotions, marketing, contests, ideas, etc. which have benefited your chapter members, our profession and/or your chapter.

To kick start member involvement we send all of our new members a New Member Packet in the mail that includes a welcome letter from the president, ARMA brochures, Board Contact List, Chapter Programs listing, and a certificate for one free luncheon.

Chapter members participated in our philanthropic events. We partner with the Masonic Home for Children in Oxford and have built a great relationship with them over the last couple of years. This year we assisted with their Fall Family Fun Day on October 24<sup>th</sup>. Chapter members assisted with arts and crafts and Bingo.

Our December meeting was held as a member appreciation luncheon. We decided to make this a free luncheon to all members and non-members hoping to bring in more members that would see the worth of membership in the organization. As you can tell from the numbers in December, free always draws a crowd. We had corporate sponsors that assisted with this endeavor and our speaker on Records Management in SharePoint was another part of the draw.

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Downtown Raleigh Alliance: We joined a group called The Downtown Raleigh Alliance. It is a networking group of downtown individual professionals as well as downtown professional groups. This membership allows us to mix and mingle with others like ourselves and potentially find new members and/or speakers.

- 2. Special Projects - Chapter Related.** Please list special chapter projects and/or ideas for chapter projects from the last two years. Think about benefits reaped from each special project and jot it down as well.

For the past two years our chapter has planned a special trip to a location with some sort of historical record significance. This is meant to be an educational trip but is also meant to be a bonding experience for our members as well as a networking opportunity for all. The program has been named, Triangle Travels. This year we went to Savannah Georgia on a chartered bus and stayed at the historical Planters Inn on Reynolds Square which is one of the oldest continuously run hotels in the Southeast. We toured the beautiful streets of Savannah, experienced a magnificent river front fireworks display, participated in the annual Colonial Faire and Muster and visited historical homes and local hangouts of the east coast's most notorious pirates. We even squeezed in a visit to Paula Deen's restaurant. Where Triangle Travels will take us next year no one knows but it has proven to be a success for a second year in a row.

Shred-a-thon: ARMA Triangle Chapter partnered with RBC Bank, Poyner Spruill, Williams Mullins and Cintas to have a citywide Shred-a-thon event in downtown Raleigh. This event was marketed and advertised via radio, internet, TV, word of mouth and even via buck slips that you receive from the bank. Port City Java donated free coffee and bagels and Jimmy John's subs donated free sandwiches. In one day we were able to take an entire Cintas shred truck, that was shredding onsite, to max capacity. This is an event that we hope to do again this year and hope to make even bigger.

New Name Tags and Badges: We had been having a lot of difficulty with people leaving with name tags causing us to have to create new name tags each month. We purchased very nice hard covered magnetic name tags that we decided would be turned in at the end of each meeting. We also purchased ribbons that stick to the bottom of the tags that designate members, board members, etc. This ended up being a bigger task than we thought but it was worth it to get a professional look.

New Website: Last summer we generated a new and improved website with a cleaner more up to date design. We have had issues finding a webmaster because the programs used to manipulate our website were difficult to use. The new program that we use, Weebly, is very user friendly and is more intuitive to the every day computer user which will open up more possibilities for webmasters.

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### CHAPTER HIGHLIGHTS -- "TIME TO SHINE"

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Please list your top three highlights for chapter year 2009-2010 (chapter accomplishments) and what you attribute their success to.

Vendor Sponsorships: This year we decided to reach out to corporate sponsors to assist with meeting expenses. In return each of the corporate sponsors got a table to display their wares and were given the opportunity for a 5-10 minute presentation on their corporate offerings. These vendor sponsorships worked very well for us and alleviated some stress from our budget. In addition, the sponsorships permitted us to offer travel stipend to speakers, so we were able to get recognized experts in the field on topics of interest to our members, leading to better attendance.

Chapter pins: We have been wanting to do chapter pins for a number of years and we finally got a design that we liked and had them produced this past spring. We are very happy with the outcome.

Shred-a-thon: We are very proud about the success of the Shred-a-thon and what we were able to do for the community. The success of this event relied on tight communication between all parties involved and the magnificent sponsorship offered by Cintas. We could not have done it without them and it is through ARMA's close relationship with them that assisted in getting us such a great price break.

### CHAPTER "LESSONS LEARNED"

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Please list chapter "lessons learned", avenues sought to correct and possible insights for avoidance or for handling the situation better.

Finding a web master has been the most difficult task for us. To open up more doors in regards to finding one we revamped the website into a more user friendly application that is more conducive to the average computer user.

We have dealt with issues surrounding meeting location. We tried, the past two years to create two different meeting locations

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to accommodate the broad area that the Triangle covers. While our home base location of the Cardinal Club has always served us the best, we have had issues with “interesting” service at our other choice, Maggiano’s, and have decided to go elsewhere. Maggiano’s family style service is not conducive to a meeting of our type. There is too many dishes clanging and banging as the servers deliver the food to the tables and take the dishes away and it never seemed like the timing was such that the speaker ever got to eat. We are looking for other options, preferably with a buffet option. We tend to think that this option works the best.

We could always have better communication between board and members. We talk/email among ourselves, but then sometimes don’t realize that the members weren’t part of those conversations. Looking for options to assist us with keeping up better with member contacts and with being able to quickly manage distribution lists.