

ARMA Great Lakes and Midwest Rocky Mountain Regional Conference

Jocelyn Gunter – NEW CEO and Energetic Leader. She was the Chief Financial officer for ARMA.

Slides will be available from the conference.

Talked about elevator speeches and finding new members and engage them.

Invite people from other associations to our meetings and we go to their meetings.

Will need to interact on the speakers database.

We need to interact with ARMA HQ and provide feedback

Need to encourage members to vote for ARMA International Board members.

New ARMA International Website coming – Will have straw man at the conference. Working on auto-renew and international.

Jocelyn talked a lot about engaged members

ARMA International Technology Changes

Will have community functions with social media and chat rooms. The new website will have standards. They talked about supplying those standards so that our website could look and operate like the ARMA International website.

Want to share data and let us pick categories to see from ARMA international. This should cut down on our emails that we have no interest in. But, we will have to tell members to get out & pick preferences.

Highlight the value of ARMA membership

Discussed what can HQ do to help the local chapters. At ARMA International, this years theme is “The year of the chapters”.

Talked about IGBOK. Information Governance body of knowledge

Talked about big changes to the ARMA conference in October. Will be much different than past conferences.

Her last slide says – Life Begins at the end of your Comfort Zone.

Additional Notes On ARMA CEO Presentation by Kent:

We must encourage members to vote in the ARMA International Elections

She made the comment “ARMA is choosing change.”

New Website with a section called “ Your Membership” by the end of the year.

“Chapter Ops Central”

ARMA has roughly 7,500 members but is engaging 20,000

We need to contact members who rarely attend meetings to find out why or if we can do something to make it easier for them to attend.

New Members discussion on what they are thinking after they join:

Within 3 days they decide if it has value.

Within 3 weeks they decide how they will engage

Within 3 months they decide if they will renew

ARMA total currently only has 40% retention on new members. The Industry average is 60%

They are working on calling new members from HQ and we need to do that at the local chapter. We need to coordinate with the HQ teams on this.

Need to talk to members that are about to lapse. We need to keep members engaged.

By Kent- When we get new members, we have to demonstrate to them that Central Missouri ARMA has the resources to provide information, training, networking that will benefit them professionally or can refer them to someone in ARMA International, who can go beyond our capability in a timely manner. Its “ What is in it for Me? “

Different sessions on Board Positions

Kent attended the Presidents session and Ray attended the Education and Programming session

Kent’s Notes from the Presidents Session

We discussed a variety of items in our meeting successes and failures.

One challenge several small chapters have is getting speakers.

Another challenge is the distance between cities where members are located.

Discussed asking Business Partners to sponsor a new member by paying for their ARMA membership. This is done by the Denver Chapter.

Bill Bradford said to not use the word vendors as it may have a negative impact on potential members. Always use Business Partners.

The idea of having a joint meeting with another organization to possibly gain members.

One group that was mentioned was the Municipal Clerks Association

Bill brought up “Elevator Speeches” where you tout your work projects and or your chapter programs with your management prospective members.

Talked about the “Zoom Meetings” as an alternative to conference calls or live meetings. Heather with ARMA has information for local chapter’s membership for Zoom.

Talked about giving a free membership for one year to a prospective members.

Member spotlight every month either on our website or an email newsletter.

Recmgt.Listserv from University of Florida- Great source for speakers.

Having Business Partners make presentations but they should be solution oriented, not sales oriented.

Rays Notes on the Education and Programming Session:

Mid Michigan Talked about web meetings – 2 meetings web with camera and notes.

Denver made a central location to meet. Then found location at outskirts. They did web meetings. Had people there and people out there that could see and call in. Paid for a web purchasing subscription. 15 called in. John Assassa did it.

Chicago – 40 -60 show up and about 10 web in every meeting. Same place every meeting

Some chapters have themes for the year.

Did a panel of vendors on disaster recovery

Said one meeting a year on certification

Talked about promoting meetings to outside people.

Talked about meetings being free for new people, etc.

Have different levels of memberships and costs. Students, retirees, guests.

New members in Denver received a welcome packet of newsletters, vendors, pin, certificate for a free meeting, list of boards. Their vendors have different levels of support and present at each meeting.

Talked about polling members for topics. Plus they do evaluations of the meetings.

Need to know where your members are from. They do question on what they want.

Some chapters have meetings in the evenings.

Talked about a speaker list. Talked about cost, attendance, how they did.

Tours are big. Told them we do a lot

Meetings cards for drawing with theme at end of year. Some partner with other group like AIIM. Partner with them.

We could speak at their meeting and then ask them to meet at mine.

Another is like sharepoint user groups. Could do Rotary, Clerks assn.

Most pre plan their meetings. They also have a canned presentation from a board member as a backup in case the tour or speaker does not work out at the last moment.

Use Survey Monkey after the meeting for people that have attended.

Mile High Success Story 2016-2017 – Presented by the Denver Chapter

3 main things – Spring Seminar Planning, Communication, Business Partners

Spring Seminar Planning – Had a detailed plan.

Communications - Send out monthly newsletters, had a detailed plan

Business Partner Program – Earlier engagement. They want them all year and get them on board in July. Get the money in early. They have a breakfast in June for the business partners and get them on board in July. They have different levels of business partners. If they sign up in July, they get on the website, in the newsletter, talk at a meeting, talk at a ½ hour workshop, booth at the spring conference, mentioned in the newspaper article. They have a platinum, Gold, Silver, and Bronze. Each level cost different and has different amount of benefits from a tiered level. They limit the number on each level. The current one gets the first right of refusal for the second year, and then after 2, one that clicks first is selected.

Question: How did they get the Business Partner program started . They copied Denver ALA. Business partners want people that sign the check.

ALA in Denver has a business partner pays a person's ARMA membership fee for a year.

Talked about telling members and prospective members, Jocelyn said it was \$9000 value for a membership.

We can put stuff about our group meetings and spring seminar in the ARMA international website.

Recruiting

Kamaal and Vanessa lead

One thing is to use the 099 list for recruiting new members to your chapter?

Look for people in your area and contact them and invite them. Tell them they are on the list.

Breakout Sessions. Used papers on the walls and rotated groups every 10 minutes.

Group wall pages pictures will be available from the International web site.

Kent's Notes

This was mentioned in several break-out sessions but using joint meetings with other associations to recruit members.

Contact university library science department and invite instructor to present at our meeting and ask them to bring students who would be interested.

Contact business and industry professionals and invite them to our presentations

I enjoyed these sessions as there were so many ideas discussed.

St. Louis Chapter Technology Presentation

65 members – Medium chapter

Communicate via email, website, facebook, linkedin, twitter,

Chairman of the board is the past President.

They have an elected board.

Events:

ARMA International CEO Bob Baird presented– 25 attended – very well received

Security Management Presentation

Christmas – at brewery, then Round Table Discussion. The Business partners gave out many gift cards before the event and they were distributed to the chapter members at this event. The chapter raised money and gave the USO many items & \$150

Effective Communications lunch & learn – well attended (was outside of records management but well received)

May – Tour of NARA military underground facility.

Spring conference – 41 attended. Topic: From Chaos to Calm. Diana Carlye from ARMA came. They had Vendors (Business Partners) at side tables and they were available to talk to attendees on the breaks.

We need to talk to St. Louis Chapter in the future about speakers for the Spring meeting.

They have a banner with they business partners name on them that are displayed at all meetings on their podium.

St. Louis has the chapter logo for ARMA and the business partners logos on all official chapter emails.

St. Louis chapter has a Facebook page and newsletter.

Star Chapter is the engine that runs the armastl.org website. This allows them to show general documents and then have the members view certain documents. The website has a payment part.

Has Email Templates and shows site hits. It will list the internal Userids that were on the pages . They pay approx. \$80 a month for this website service.

Region Board Time – End of First Day

Kent and I attended the Rocky Mountain Midwest region meeting

Initially discussed possible changes to the meeting setup and what was being discussed. There are currently 8 regions set up. Talked about 4 possibilities. They are:

- Current setup with Rocky Mountain Midwest region with the Great Lakes Region (make for 4 meetings nationally for ARMA International to attend). This is the third year of this setup.
- Old way of each of the 8 regions having their own meeting. International would have 8 meetings.
- An East and a West meeting. International would have 2 meetings to attend.

- One huge meeting at ARMA International conference with all regions. This would add another day or 2 to the big conference. ARMA International would only have 1 meeting.

The group liked the current setup. The Rocky Mountain Midwest region has a lot in common with the Great Lakes region. We are a lot different than the East and West coast.

Next, discussion about what the Region Board provides and the different members' duties:

Kathy Nielsen (Denver Chapter)– Education & Programs – She will be helping with speaker database

Vanessa Dordram – Membership & Marketing - She will let us know what other chapters are doing and send information on building membership.

Paula Sutton – Operation – Experienced member who will help the chapter Treasurers and Secretaries.

I need to check out the Leadership site on the ARMA.ORG/Leadership link. They need to get ours . They will send a link. **Ray, I already filled out the form on-line. Is this something different ? Kent**

990 forms are due on August 1. **Joe has submitted the 990 form and IRS has acknowledged receipt.**

Saturday - Second Day

First, a video was presented from the ARMA International. The video had Heather Lehman, Liz Icenogle, and Jocelyn Gunter in the video. In this video, they discussed what was going on at ARMA International and the focus for the next year. The video lasted about 10-15 minutes. Kent said that we need to get the video and send the videos to the other board members.

Mike Smith from the St. Louis chapter did a presentation on the AIEF (Education, Scholarships, & Research) function. AIEF is separate from ARMA with a board and committees. They offer scholarships and research grants.

They help out college kids, and research into the profession.

You can donate when you renew dues and raffle tickets.

They have distributed \$202,000 thru the past 10 years. They are self supported.

The research education is free and available on the ARMA website.

Check out the ARMAFOUNDATION website.

Had a breakout session on Finding Speakers

People broken into 4 groups to discuss ideas and rotate every 10 minutes.

Speaker Database will be organized and distributed at the region level

Group wall pages pictures will be available from the International web site

Had a breakout session on Finding Speakers

Kent's notes on finding speakers

Survey by email or electronic survey.

Suggestion Box

Old School-Face to Face

Ask new members for ideas

Survey after every meeting on topic interest

New member kit

Sample topics given:

Maximizing Your Professional Value

Records 101 with Lifecycle Chart

General Accepted Record Keeping Principals and how your organization "measures Up"

" The Three C's –Collaboration, Communication and Cooperation"

Sharpening RIM Toolkits

Internet of Things

Some chapters have a theme for the year that has associated meetings for that theme.

Had a Breakout Session on Engaging Members in the Chapters

People broken into groups to discuss ideas.

The sessions focused on talking about GAPS that exist in engaging members in the chapter. G stood for Goals % Growth, A for Alignment & Appreciation, P for Progress & People.

Talked about Strengths, Weaknesses, Opportunities, and Threats for each letter.

Group wall pages pictures will be available from the International web site.

Strategic Planning – 12:45

Chrissy Bagby- works for ARMA International

USE GOST – Goals, Objective, Strategies, and Tactics

Annual Process – review every 12 months

Goals are re-evaluated every year. First you re-evaluate the past years goals.

Objectives – How we measure. What success looks like. Want to be able to measure

Strategies – How are we going to get there.

Tactics – little things to get there

Example:

Goal – Provide an exceptional membership experience

Objective –Improve first year retention by 45%

Strategy – friction free experience for new members

Tactics- New member packet

ARMA International has prioritized their Goals. First improve web site.

ARMA has 8 main goals for 2017. Get those from the International website

Look at the Key Takeaways. Annual Strategic plan sessions should not take over half a day.

You do not always get them done. Review every year. Start with last years goals.

People have to take ownership

We need to look at the ARMA International Strategic Plan and talk about us getting one for our chapter.

Strategic Plan helps to make decisions

Chapter Reports from 1:30 – 4:00

Twin Cities Chapter – Helped a couple charities did veterans help group.

Wyoming – Does a lot with a little. They get about 40 for spring conference. Good Newsletter. Received a reward.

Nebraska - Nebraska had John Azzaza as a speaker at Spring Seminar. Nebraska has a booth at job fairs. Nebraska does videos on their website. We should check it out.

Denver – Gave a long presentation. They are huge and do huge things. Most of their stuff was presented on Saturday, but the lady still talked a long time.

Wyoming – Has about 20 members that are spread out around the state. They do several webinars a year. For their Spring Conference, they had 40 attendees.

Kansas City – Said that half of their board was vendors. They did not have a spring conference. They are looking to get more organized and the presenter will take the conference information and ideas back to the group.

Cincinnati – Board member talked about several tours and meetings. One of their charitable projects was a community event called shred day. People brought boxes of papers on a Saturday and they helped load into the shred truck. The chapter paid for the shred truck. They had a long line of cars lined up.

During the Chapter Reports, Speakers names mentioned

Talked about Andrew and Courtney Stone as speakers – the western Michigan and the Wyoming group have had Courtney Stone. Chris Bauer from Nashville did the Cleveland Spring Conference

Randy Conn was a speaker for Cleveland ARMA.

ARMA International Board Member Tera Ladner knows a lot of speakers. She lives in Atlanta.

Nebraska had John Azzaza as a speaker at Spring Seminar.

Random Notes

Try to utilize ARMA website and Materials. New version coming out late this fall. They will have a straw man at the ARMA conference in October.

Many chapters have surveys after the meetings. Some use survey monkey.

Some chapters have new members baskets with gift cards.

Need to introduce new members and attendees

Engage members that have not been attending

Ice Breakers added to some meetings. That way you learn more about the attendees.

Talk to other community groups and see if they want to attend any of our meetings and in turn we attend some of their meetings.

Talk about using ARMA skills in personal life like church, scout troops, etc.

A lot of chapters use Facebook, Twitter and have monthly or bi-monthly newsletters.

One chapter named one of the annual awards after a retired member. They asked that retired person to present the award every year. Also asked them to help mentor.