



# Choo Choo Chatter



Volume 23, Issue 5

The Official Publication of the Greater Chattanooga Area Chapter

February 2010

[www.chattanooga-arma.org](http://www.chattanooga-arma.org)

*SE ARMA Region Mgr*  
Alice Young

*SE Region Coordinators*  
Linda Johnson  
Juana Walker, Treasurer

*Chairman of the Board*  
Scottie Swafford  
UNUM Corporation  
423/294-1529

*President*  
Victoria Marshall  
Blue Cross Blue Shield  
423/535-6560

*VP Programs*  
Gregg Long, CRM  
MMI Enterprises, Inc.  
423/316-5554

*VP Membership*  
Kevin Tisdell  
Shaw Industries Group, Inc.  
706-275-1177

*Secretary*  
Annie Powell  
CARTA  
423/629-1411

*Treasurer*  
Susan B. Whitmire, CRM, FAI  
Blue Cross Blue Shield-TN  
423-535-3328

*Directors:*

Leanne Bostwick  
Blue Cross Blue Shield-TN  
423/535-7247

Shari Hixson  
RecordMax Chattanooga, LLC  
423—265-8836

## March Meeting

**Program:** Elisha Hodge, Open Records Specialist  
Tennessee Open Records Laws

**Date:** March 9, 2010

**Location:** The Country Place  
7320 Shallowford Rd.  
Chattanooga, TN

**Time:** 11:30am – 1:00pm

**Registration:** Members & first time guests \$15.00  
Returning guests \$16.00

**Payment:** Cash or checks are accepted, payable at the door.  
Make payable to: ARMA-Greater Chattanooga  
Area Chapter

To RSVP, please call or email no later than 2:00 p.m., February 5, 2010:

- Rikki Zengel, (423) 535-4060  
[rikki\\_zengel@bcbst.com](mailto:rikki_zengel@bcbst.com)
- Norma Parris, (423) 238-7111 x22659  
[Norma\\_Parris@mckee.com](mailto:Norma_Parris@mckee.com)

*\*Reservations not canceled by 2:00 p.m., March 5, 2010, will require payment of the registration fee. Contributions or gifts to our organization are not deductible as charitable contributions for U.S. federal income tax purposes. Membership dues and other payments may be deductible as ordinary necessary business expenses.*

**COMMITTEE CHAIRPERSONS**

Awards – Scotty Swafford

Chapter Foundation Champion  
– Susan Whitmire, CRM, FAI

Communications – Annie  
Powell

Education – Leanne Bostwick

Hospitality – Shari Hixson

ICRM Liaison – Rikki Zengel,  
CRM

Newsletter - Mary LaFollette

Publicity – Scottie Swafford

Webmaster - Kevin Tisdal

Yearbook/Historian – Phyllis  
Beene



The Greater Chattanooga Chapter promotes and recognizes the importance of participation by awarding points to those who support ARMA activities at both the local and the international level. Points are earned by attending meetings, bringing guests, and by serving the Chapter as an officer or committee member. At the June meeting accumulated points are rewarded. The more you participate, the more points you can earn!

**Support the Chapter Points**

- Attend Workshops* 100
- Attend Luncheon Meetings* 200
- Attend Dinner Meeting* 300
- Bring a Guest* 100
- Attend Regional Conf.* 400
- Perfect Attendance (Sept-May)* 500

**Support ARMA International**

- Attend Annual Conference* 200

**Get Creative**

- Submit article for newsletter* 200  
*(excludes routine notices, etc.)*

**Get Involved Locally**

- Be a Board Member* 200
- Be a Committee Chair* 150
- Be a Committee Member* 100
- Attend a Board Meeting* 100

**TABLE OF CONTENTS**

<b>This Month's Meeting</b>	Cover
<i>SIDE BAR</i> - Officers & Board Members	Cover
<b>Table of Contents</b>	2
<b>Participation Station</b>	2
<i>SIDE BAR</i> - Committee Chairpersons	2
Members Points	2
<b>President's Message</b>	3
<i>SIDE BAR</i> - Newsletter Advertising Rates	3
Newsletter Info	3
<b>Training Depot</b>	4
<i>SIDE BAR</i> - Future Conferences	4
<b>CRM Express</b>	5
<i>SIDE BAR</i> - ARMA Ed Foundation	5 - 6
<b>Education Corner</b>	7
<b>Meeting in Review</b>	8
<b>In the News...</b>	9
<b>Board Meeting Summary</b>	10
<b>Treasury Report</b>	10

**PARTICIPATION STATION**

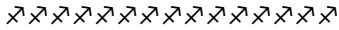
**Members Points**

MEMBER	POINTS	MEMBER	POINTS
Akers, Chris	400	Orth, Linda	0
Beene, Phyllis	1150	Parris, Norma	1200
Bostwick, Leanne	1150	Patterson, Gail	0
Dotson, Tony	200	Pettway, Robert	600
Hixson, Shari	1350	Phillips, Matthew	0
Jackson, Dennis	400	Powell, Annie	1150
Johnson, Linda	600	Ragland, Mary	0
Kimbrough, Charles	1300	Ramachandran, Ravinder	600
Kologek, Ian	0	Scott, Glenda	400
LaFollette, Mary	1150	Shugart, Jeff	600
Long, Gregg	1200	Stoddard, Catherine	800
Marshall, Victoria	1900	Swafford, Scottie	1350
McEvoy, Laura	400	Teske, Jim	0
Miller, Lorraine	800	Tisdale, Kevin	1150
Mullins, Ronald	600	Whitmire, Susan	1450
		Zengel, Rikki	950

**If your points are not reported correctly, please contact Scottie Swafford.**

**NEWSLETTER ADVERTISING RATES**

Business Card Size	\$ 5.00
Quarter Page	\$10.00
Half Page	\$20.00
Full Page	\$40.00

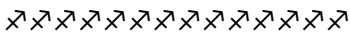


Choo Choo Chatter is the official publication of the Greater Chattanooga Chapter of ARMA International and is published monthly in Chattanooga, TN, for its members and other Records and Information Professionals.

Mary LaFollette, Editor  
423-535-2762

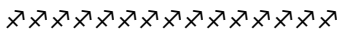
The Information contained in this newsletter does not necessarily reflect the views of the editor, the Chapter membership or ARMA and is offered solely as a source of information. Please direct any inquiries or comments to:

Newsletter Editor  
ARMA Greater Chattanooga Area Chapter  
PO Box 341  
Chattanooga, TN 37401-0341



Contributions or gifts to the Greater Chattanooga Area Chapter are ***NOT*** deductible contributions for U.S. Federal tax purposes. Membership dues and other payments may be deductible as ordinary business expenses.

Contributions or gifts to ARMA are ***NOT*** tax deductible as charitable contributions for U.S. Federal Income Tax purposes.



**MEETING & LUNCHEON RATES**

Luncheon (members & 1 <sup>st</sup> time visitors)	\$15.00
Luncheon (visitors)	\$16.00
Workshop	\$25.00
Site Visit	\$20.00

**PRESIDENT'S MESSAGE**

**Exposure, Exposure, Exposure!!!!**

Guess what? Want to know a secret? The Greater Chattanooga Area ARMA Chapter is a well kept secret. Oh, no! The plan to sharing this well kept secret is to continue the growth of our Chapter not only educationally but with membership growth and exposure. To help us in spreading the word about our Chapter, Scottie Swafford, Unum, has developed a media kit. After Scottie has tested this new tool, we will share it with the Chapter.

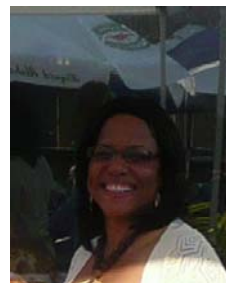
In April, the Greater Chattanooga Area ARMA Chapter has planned a "Personal Shred Day" for the public. Charles Kimbrough, CJ Enterprises, Inc., has designed and developed a pamphlet containing tips and guidelines for shredding and keeping of personal documents.

This activity will be held at Hamilton Place. We would like for all members to be a part of this project to make it a huge success. This type of exposure will be a first for our Chapter and all suggestions as to how to make this a success are welcomed. This project will give the Greater Chattanooga Area ARMA Chapter great exposure.

***MORE TO COME CONCERNING PERSONAL SHRED DAY***

See you at the March meeting,

*Victoria Marshall, President  
Greater Chattanooga Area Chapter*



**START PLANNING NOW  
TO ATTEND A FUTURE  
CONFERENCE:**

**ARMA  
INTERNATIONAL  
CONFERENCES**

**November 7-10, 2010**  
San Francisco, CA

**October 16-19, 2011**  
Washington, D. C.

**September 23-26, 2012**  
Chicago, IL

# TRAINING DEPOT

**April 13, 2010**

Thomas Odure

**Enhancing your RIM Program through Process Management**

**May 11, 2010**

Iron Mountain Site Visit

**June 4, 2010**

**Awards and Officer Installation**

A leader is someone who can set direction and impart vision.

A leader is able to serve, build loyalty, motivate, and inspire.

A leader is ready to listen, encourage others, and invest in their lives.

A leader is someone who wins hearts.

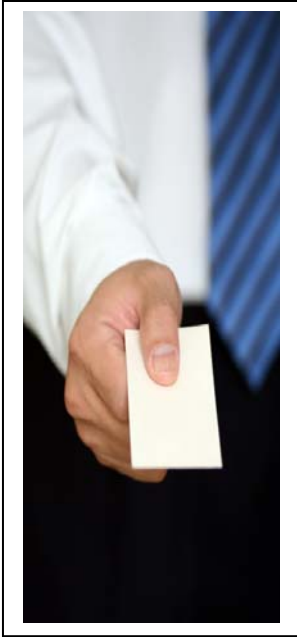
Source: Roy Lessin  
Wisdom for the Workplace

ARMA International

Greater Chattanooga Area Chapter

P O Box 341

Chattanooga TN 37401-0341



Want to invest in the future of your profession?

Make a contribution.

As an ARMA member.

As a Vendor to the profession.

As an ARMA chapter.

See Susan Whitmire, CRM, FAI, Foundation Chapter Champion, for more details or log on to:

[www.armaedfoundation.org](http://www.armaedfoundation.org)

Do you know someone who would benefit from receiving this newsletter?

Send their name, address and e-mail to [susan.whitmire@bcbst.com](mailto:susan.whitmire@bcbst.com)

## *CRM Express*

# Institute of Certified Records Managers



The Greater Chattanooga Chapter recognizes and supports its candidates in their efforts to achieve the Certified Records Manager (CRM) designation.

Other Chapter members who continue their studies toward CRM certification include:

Phyllis Beene  
Linda Johnson  
Charles Kimbrough  
Victoria Marshall  
Scottie Swafford

### ICRM 2010 Exam Schedule

**Parts 1- 5:**

**May 3 - 7, 2010**

**Part 6:**

**May 6, 2010**

**Exam Registration:**

**February 17, 2010 – April 29, 2010**

## Archives and Records Management Education Goes eGlobal

Today's archivists and records managers are faced with a variety of challenges, including managing records created using emerging technologies and records residing in more than one country. While many archivists and records managers recognize the need for further education to prepare them to meet these challenges, busy work schedules and family commitments present barriers.

In response, the San Jose School of Library and Information Science launched a *fully online* Master of Archives and Records Administration (MARA) degree program two years ago. Students can live anywhere as they complete their degree in less than three years using a variety of sophisticated distance learning tools, including web conferencing for real-time audio and video discussions, as well as wikis, blogs, twitter, and 3D immersive learning environments.

MARA students participate in a cohort model, studying with a small group of peers who share the learning journey together. They receive instruction and mentoring from faculty and professionals who are award-winning scholars and leaders in their academic and professional communities – and who live around the globe, bringing an international perspective on emerging trends in the field.

Applications are now being accepted for the third MARA cohort, scheduled to begin classes in August 2010. The deadline to apply is March 30.

Additional information about the MARA program can be found at <http://slisweb.sjsu.edu/mara/>.

Individuals interested in applying for the MARA program can also contact Dr. Patricia Franks, MARA Program Coordinator, at [pfranks@slis.sjsu.edu](mailto:pfranks@slis.sjsu.edu).

## Education Corner



### The beginning

*You have to learn to walk before you can run.* Such is the case for the person just entering the records and information management field. According to ARMA International's "Records and Information Core Competencies", the Level 1 (entry level) RIM professional should have general business knowledge and skills. Activities are identified that support the Business Function along with the knowledge and skills needed to effectively carry them out. One example is being able to provide input to management based on current and projected workload, an action that requires knowledge of organization policies and procedures and being able to identify, compile, sort, organize, and record appropriate data, as well as to communicating results and findings effectively. Other activities include identifying, documenting, and providing input to management related to business processes to improve the quality of the RIM program and providing input for more effective facility layout, informing management of issues that have an impact on RIM compliance and program performance, and being able to collect and provide data as required to support the management of expenditures. To find out what knowledge and skills are recommended to achieve success for each of these activities, visit ARMA International's website, at <http://www.arma.org/competencies/index.cfm>.

When I first entered the RIM profession, what helped me was reading, tagging along with seasoned professionals, and just learning by *doing*. I triple-checked spelling and grammar before pressing the send button, and I worked on improving my Excel skills. Looking to see what corporate policies were already available that touched on records management and identifying and becoming familiar with important resources such as NARA and the Federal Code of Regulations were helpful endeavors. Searching the Internet for retention schedules and, alternately, disposition schedules provided an opportunity to see what others are doing. Looking for citations to support retention periods was a worthwhile exercise, causing me to brush up on research skills. Scouring periodicals and becoming immersed in RIM theory and current issues filled any spare minutes. Most of all, I asked a LOT of questions. All of this gave me the grounding that I needed to make a contribution to the RIM program. It is gratifying to read the Core Competencies and realize that I have acquired the suggested skills and knowledge for the Level 1 professional and I am now ready to evaluate where I currently fall on the scale. I recommend you do the same – you may be pleasantly surprised to see how far you have come along.

*Keep moving ahead by learning and have a great month!*

Leanne Bostwick, BCBST Consultant

## *Meeting in Review*

Presenter: Steve Cox, UTC Archivist and Special Collections Librarian  
Date: February 9, 2010  
Topic: The Special Collections of UTC'S Lupton Library  
Written by: Catherine Stoddard, CRM, FLMI, HIA

We now know what the best kept secret at UTC is, thanks to Steve Cox, UTC Archivist and Special Collections Librarian. He provided an overview of some of the many treasures contained in the Special Collections of the UTC Lupton Library. The Special Collections holds four main collections:

- Manuscripts, Personal Papers and Local History Collections
- Rare Book Collections
- University Archives
- Archives of the Fellowship of Southern Writers and the Arlie Herron Collection.

As a graduate of UTC, it was very interesting to learn about the unique and rare items that are part of the Special Collections department at the Lupton Library. Here is a list of my favorite items that Steve mentioned:

- A 1623 copy of William Shakespeare's *The Twelfth Night* - This play is from the second folio of Shakespeare's works. Steve believes it was part of a book that was taken apart and the plays were sold individually. The play was donated to the University in the 1940's.
- A letter from Gandhi – In the early part of the 20<sup>th</sup> century, the University's chancellor wrote famous people across the globe asking them to send a word of advice to the school's incoming freshman. Gandhi's short note is part of scrapbook containing other University memorabilia.
- John T. Wilder's letters – John Wilder fought in the Civil War. After the war, he relocated to Chattanooga. He became one of Chattanooga's mayors, helped found the U.S. Grant University (which later became UTC) and ran for the Senate. His letters are available on-line at [www.lib.utc.edu/specialcollections.html](http://www.lib.utc.edu/specialcollections.html).
- Emma Bell Miles's papers - Emma Bell Miles lived on Signal Mountain in the late 1800s and early 1900s. She was a poet, writer and artist. In 1905, she published a book, *The Spirit of the Mountains*. She died in 1919 at the age of 39.
- Pictures from the early days of U.S. Grant University

You can find out more information about these wonderful treasures in the Special Collection by checking out the website [www.lib.utc.edu/specialcollections.html](http://www.lib.utc.edu/specialcollections.html), by email [archives@utc.edu](mailto:archives@utc.edu), or by contacting the Special Collections department at 423.425.2186.

The future is bright for the Special Collections department; UTC has just broken ground on a new library which will open in 2012. This department is going to have a much larger space in the new building which will give them a better opportunity to share the best kept secret at UTC with the rest of the community.

# *In the News . . .*

## **What is a file plan?**

A file plan is a comprehensive outline that includes the records series, file organization, active file locations, file transfer instructions, file retention and disposition instructions, and other specific instructions that provide guidance for effective management of records, including vital records. File plans specify how records are to be organized once they have been created or received, provide a "roadmap" to the records created and maintained by an organizational unit, and facilitate dispositioning the records.

A file plan lists the records in your office, and describes how they are organized and maintained. A good file plan is one of the essential components of a recordkeeping system, and a key to a successful records management program. It will help you:

- document your activities effectively
- identify records consistently
- retrieve records quickly
- meet statutory and regulatory requirements
- disposition records no longer needed

The file structure is the framework of your file plan; the EMCBC's file structure (Uniform File Code [UFC]) is arranged based on the DOE record control schedules. A comprehensive file plan provides a "location" for each record in a paper filing system. Understanding the file plan helps users know where to file their records and helps others know where to find the records they need to complete their tasks. Creating the file plan requires an inventory of all work and storage spaces. The final product will be a complete listing of all types of records maintained by your organizational unit.

The file plan is created by detailing the file series of the records in your organizational unit, as well as information about how they are managed and by whom. When creating the file plan, keep in mind that someone else may need to use it in the future. Therefore, avoid using jargon, information titles, abbreviations or proper names of current office holders to describe the records.

### **Other tips for completing a file plan:**

Complete a line item for each record series. Give each series a title for brief reference. Examples include: Property, Control Records, and Bills of Lading.

List the earliest and latest dates of the records in each series. If the series is still being created at the time of the inventory, indicate the latest date by the designation "to date" or "to present." NARA requires agencies to give inclusive dates for records proposed for permanent retention and also for nonrecurring records proposed for immediate destruction.

Each series description should contain enough information to show the purpose, use, and subject content of the records.

Follow these guidelines in describing the series:

- a) Avoid emphasizing form numbers, especially when describing case files.
- b) Consider combining into a single inventory item a number of very small series of temporary records if they serve the same function and are proposed for the same retention period.
- c) Avoid terms, such as "miscellaneous" or "various," that add nothing to the description.

(Posted on the web by EMCBC Records Management Team, Department of Energy.)

***Greater Chattanooga Area Chapter ARMA Board of Directors***  
**January Board Meeting**

The Greater Chattanooga Area Chapter Board of Directors met on January 26, 2010, at Wally's Restaurant.

Summary:

Treasurer's Report was submitted. Membership is currently at 31 members. The program for February has been confirmed. Publicity is working with local newspapers to publish an announcement regarding the 2008-2009 Chapter awards; there will be a need to purchase software to be used for the website and will be loaded onto one computer. Education has contacted Carolyn Jones regarding opportunities to work with Chattanooga State, to encourage students to attend Chapter meetings, or invite the instructor to join our Chapter. Yearbook/historian suggested that monthly summary documentation to include photographs be kept for the yearbook which could also be used for completing the COTY award documents.

New business – Shred Day event being planned. A truck will be scheduled for this event. Members are encouraged to support this event. A brochure is being designed and developed that will contain tips and guidelines on what to keep and what to shred.

*Next Board Meeting will be a conference call to be held on February 23, 2010 – 8:00 am.*

Respectfully submitted,

Annie Powell  
Secretary, Greater Chattanooga Area Chapter

***Greater Chattanooga Area Chapter Treasury Report***

*December 31, 2009*

Treasurer's Report:

- o Money Market    \$5,117.47
- o Savings            \$    25.19
- o Checking           \$2,465.56
- o Net Assets         \$7,608.22