

**ARMA Southwest & Southeast Regions Leadership Conference
June 28 and 29, 2018 – Session Notes by Tom Forsyth, CRM, Region Secretary
(Includes Session Posters)**

Day One on Thursday June 28, 2018

The conference officially kicked off at 8:06 am on Thursday June 28, 2018.

MBH started by passing out 3 X 5 cards with a request for the conference attendees to write down 2 challenges and 1 opportunity. She says that we will try to address these over the next two days.

Earl: We will bring the conference back to Southeast region in 2019.

Session 1: Marie Pier Clark on “Re-energize your leadership”:

Session Poster: What are qualities of a leader?

- Intelligent
- Authentic
- Passionate
- Empathy
- Courage
- Decisive
- Integrity
- Engaging
- Empowerment
- Visionary
- Charismatic
- Influencer
- Approachable

What is leadership? We all have capacity for leadership even if we are not in a leadership capacity.

“Whether you think you can or can’t, you are right either way” – Henry Ford

- Leadership engagement
 - trust
- Tactical focus
- Team Dev

Awareness and desire to get better.

Marie Pier provided these statistics:

- Employee engagement. 70% of U.S. workers are not engaged at work.
- Only 12% of employees leave for money.
- 75% of employees quit their bosses, not their jobs
- 87% of employees were less likely to leave if they are highly engaged.

She recommends the book “The Speed of Trust” by Steven Covey. In this book, Mr. Covey says the first two ways of trust are:

1. Self-trust credible:
 - a. Are you credible person?
 - b. Character and competence.
 - c. Are you able to make and keep commitments to yourself?
 - d. What are your values?
 - e. Your actions show what is in your heart.
 - f. Leader delivers results. Do you trust yourself to deliver results?
 - g. Do you know your strengths?
 - h. Do you keep them relevant like going to training?
 - i. Make effort of constant learning.

2. 2nd way is relationship trust. Once you establish your credibility.
 - a. For others to trust you, people judge you on your behaviors not your intent.
 - b. Be transparent. Don't make them guess what you mean. Talk straight.
 - c. Demonstrate respect.
 - d. Deliver results; not just talk, but action.
 - e. Keep improving.
 - f. Listen first- time for check-ins with boss.
 - g. Keep commitments
 - h. Extend trust/build trust – is your behavior consistent with what you say?
 - i. Create safe environment.

Approachability: You must be approachable even with bad news, not just good news.

Mentoring: The leader's job is to empower his workers. The leader must provide them with tools to help them to become successful in their jobs. The leader must create a safe environment.

Mentoring can be done through leader:

- Find a way in your team to have buddy system.
- Someone assigned to a new employee.
- Safe to grow, make mistakes and leader has your back.

Toastmaster pillars:

- Learn develop at your own rate
- Peer feedback.
- Experiential learning by doing
- Mentoring – new members are given a mentor to help them stay engaged.

Alignment:

What people do daily matters; it is part of the success of an organization.

Need leader to help us see connection of what we do for the organization.

Success is about growing yourself and then helping other people to grow.

Tactical focus:

- What are our goals
- What works/doesn't work
- What is in way of success?
- What does success look like?

Hands on tactile. Leader reassess how they do their daily work. What changes need to be made to be successful? Remove barriers to be successful.

AWP stands for "Advanced Work Packaging". This is goal of Zachary Construction.

Zachary's leader recognizes employee service in their meetings.

"A leader takes people where they want to go...a great leader takes people where they don't necessarily where they want to go but where they **ought** to go." Rosalynn Carter.

Working towards success. The employee who feels the work that he or she performs truly matters is key to employee engagement. These employees have extra energy and are the ones who are going above and beyond.

Team Development: relax and get to know each other. Create new friendships, forge bonds and network. We like to share our knowledge and experience.

Creating resiliency and develop team goals. Create resiliency with environment that is energetic and safe.

Are you willing to ask for help?

As people are engaged, you can start to work on TEAM GOALS in order to become a HIGH PERFORMANCE TEAM. Give team goals that they can reach together.

"Don't tell people how to do things. They then what needs to be done and they will surprise you with results." George Patton.

What do you do to create more engagements?

What do you focus on? What are obstacles in the way?

How will you make a difference within your team?

You don't have to be great to start, but you have to start to be great!

ALL presentations will be available on the region website.

Session II on Day One: Ryan Zilm on “Leadership”:

Leadership:

- History of Leadership
- Hard and soft skills
- Id areas of improvement

Who do you consider to be a great leader? What characteristics that made them great leader?

1. Emotional intelligence falls under the area of soft skills, including persuasion and adaptability. It is contrasted with hard skills which include: language, PM skills, classification, tangible skills). ARMA offers training for leadership. Have you taken the ARMA Leadership Training course? It is free for chapter leaders. You should require that all the board members take it. Jennifer says it is being updated. Both soft skills and hard skills are needed.
2. A key skill is being a Self-Starter; a person who begins to work on new initiatives on their own. Are you motivated to be good example or internally driven by competitive instinct? You want to be seen as a leader to be followed. Other leadership traits:
3. Passionate leaders are:
 - Driven by mission/vision
 - Attitude of positivity
 - Infectious nature
4. Motivator – use passion to influence others:
 - Encourages others to participate and volunteer
 - Cheerleader for organization.
 - ID individual motivations

Do you give certificates of achievement to recognize volunteers? Austin chapter gives Participation points the more you are active in your chapter.

De-motivators: like we tried that last year and it didn't work.

Servant leadership – leading with others in mind. What you can give vs. what you will receive.

Participate vs. dictate. Lead by example. Lead by example. Compassion for others. Shred day, fundraiser. What can I do to help? Connect with mentors.

Conflict is the incompatibility between two or more interests or principles or opinions. Know when to fold them. Understand the passion behind the conflict. Is it healthy vs. unhealthy. Handle conflict is imperative. Let there be a release. Use it as an advantage to enhance a program, process or practice.

Creative Thinking outside the norm. Drive much needed change. Can result in new ideas for fundraising, or ways to connect. Partnering with AARP for the Shred Day and having AARP broadcast it to their network is a prime example of creative thinking that is outside of the norm. It reflects a non-conventional mindset.

Strategic vs. tactical. The ARMA International board establishes strategy. Jocelyn and the executive team is responsible for the tactical impact of strategy. Does your chapter have goals? Can you define three simple top goals for your chapter? What do we do to meet them? How do we measure success?

How many have WebEx and remote connect to others to be present at monthly meetings?

You can still charge for meetings to generate revenue even with the remote site.

Carrie in Baton Rouge: We need to find a person in remote area to be willing to host the remote meeting.

Houston shared their meetings with the Tulsa chapter using remote connection so the Tulsa members could attend their meeting.

Other leadership traits:

1. Financial Acumen at a high level. You must know where the chapter dollars (\$) are going. Do you do budgeting? Do you do SWOT analysis. Be aware of best practices. Trends. How membership is increasing or decreasing? Are you auditing finances? Are you investing funds wisely with sound spending like attending the RLC? Are you doing Fundraising? What are limits? Project management of the fundraiser is vital to its success. You must be able to enlist others in the cause. Involving AARP in Shred Day is a good example.
2. Listening: hear someone or something. Actively and attentively receiving. Don't squash ideas. Let people build off other ideas. This is being open and respectful. Assume positive intent in message. Be respectful. Collaborate. Make sure you have people who are excited. If they don't win on a run for a chapter office, then find another role for them!
3. Acceptability. Quality of being tolerated. Ex: groupthink, traditionalism, embracing diversity, etc. You don't want to segregate.
4. Sound judgement: just deliberation. Is it right thing? Make sure that you allow all of the ideas to be heard.
5. Persistency. Continue firmly in course of action. Perseverance limits with emotional intelligence.
6. Stamina, sustain prolonged physical or mental effort. How to avoid example of board burnout.

Session 3 on Day One: ARMA Strategy and Planning Update – Jocelyn Gunter

Alignment – evolution and pendulum on our brand and mission. We want to have a consistent message.

GOST – goals objectives, strategies and tactics.

“Get to know us” is up front messaging on our website. It provides a perspective on profession. Why we broaden scope to information assets, not just records.

ARMA Audience Stats:

- 25% government at all levels
- 5-7% fed government.
- 66% small companies.
- 63% of members are in the 41-64 age group.
- 86% are chapter members
- 27% 1-3 years
- 18% 7-10 years
- 17% 21+ years

Within 1st 3 days of joining, a member will decide if they joined the right organization.

Within the first 3 weeks, they will decide if they are going to engage in the organization.

In the first 3 months, the new member knows if they are going to renew.

Some members come in only on a project. We should empower them to go back to organization and say: “This is bigger than this project”.

New member orientation. Retention is 67-70% in history of last 8 years.

1st year retention? Low 40”s. Need to communicate value and get them engaged.

Micro-volunteering. Every month call 4-5 new members every month about ARMA.

Some of the little things we saw: 8% growth to 48-50% on month to month basis.

Overall retention rates include the group _____

Best practice is to spend a certain amount of time and money on non-members. The chapter may consider throwing first year membership in there.

Top challenges for leaders: volunteer burnout - 38%; member participation - 23%. Chapters have high membership and low engagement.

If Chapters focus on better content, then price of the meeting is not an issue and attendance goes way up!

Current ARMA GOST’s?

Website, 1st year retention, social engagement, IGBOK, conference experience

Yellow status: IGP, SEO, Partnerships. Red status: membership size, conference attendance.

Information governance body of knowledge (IGBOK). Rather than new publications, the foundation is a free resource. ARMA has released the first 4 chapters. It provides a perspective on the profession that is out there. It should be a collateral for new member's awareness. The full publication will be a true guide of processes/best practices for these doing the work. It is a tool that the ARMA member can use to show/say "This is what I do with the job complexities and competencies needed.

ARMA sees IGBOK as comparable to PMBOK. PM was first perceived as a job and then as a profession.

Goals? Employ sustainable technology, provide excellent membership experience, improve chapter/region satisfaction, increase membership and membership engagement, increase visibility/influence and help members with professional opportunities.

SEO: Search Engine Optimization.

Generate awareness of value of IGP certification. How ARMA certifications align with other industry certs?

Not sure we have figured out where to spend time money and effort.

We have these ideas for content technologies, it is challenge. We do a lot of things that are not getting utilized like Chapter Central resource. Our goal is to make sure you will use it before we invest in it. What can we do differently that will get used?

Next year theme: The next chapter...More changes and disruptions, innovations, processes, resources, more nimble.

Satisfaction equation: Support + recognition + impact + personal growth = satisfaction

What can we do? More effective reporting. Baseline to measure. Have a speaker database. Onboarding tips, chapter session assistance.

We are looking at new membership types.

Success equation: Informed + cohesive communications + integrated efforts = success

Communication strategy, recruitment and chapter advisors

Young professional advisory groups. Micro-volunteering. Which member willing to give few hours to give feedback. Have a group teed up ready and willing to give constructive feedback. Appetite: let's just do it. Not talk about it.

Change management. Paralyzed by Change Management process that is too long. We need to be nimble.

ARMA Components: regions and chapters. Local chapter and regional events are amazing. Are we competing with each other for these events? There are a lot of attendees at these events who are non-members.

Do we get delegates as representatives of chapters and regions? Get everyone together who represent community/chapter and make big decisions. Accept and support them and move forward.

“Raise” the bar stands for:

- Relevant
- Agile
- Integrated
- Simulate
- Essential

New ARMA members get welcome email and a call from HR staff. New member campaign. Automated messages. Get a physical packet with a roadmap. How to fit what we do into the timeline.

ARMA new member toolkit written for chapters. Tomorrow.

New member: brand new or not a member for 3 years.

Banner for new members where we are going to have our meetings?

Event calendar on ARMA website.

Especially if you are doing the virtual options.

Opportunity to engage others in your chapter meetings.

Seed to plant is an ARMA phone app.

If there is something you have seen that will help the chapter at the local level.

Event calendar social link piece, content you could host there.

Gamification: paper passport for visiting booth. You can points for doing different engagement activities.

ARMA Ambassador Update is a monthly recording by Jocelyn Gunter, ARMA CEO. It goes to every single region leader or chapter leader. It goes out in chapter connections.

Session 4 on Day One: Anita Castora presentation on “Recruiting Maintaining and Engaging Members”

Where do you draw from?

1. Non chapter member list (formerly 099 list). Draw in new members by giving them first year membership free. If you engage them, they will stay!
2. Maintain database and generate mass emails/mass mailings from it.

How do we keep them? Maintaining membership. How do we get them to stay? What industry are they in?

1. Engage them in meaningful activity
 - Based on their need
 - Based on their skill
 - Achievable, non-threatening
2. Give recognition for their efforts/contributions. Jacksonville FL chapter went 4 members to 22 members.
3. You want to have good programming. Content is key!

4 step program for member retention

- Focus on new members
- Get everyone involved in activity
- Given recognition
- Develop effective renewal process

What is the process in your chapter when someone drops off? If you don't have one, then someone is not paying attention. It is like not watching your checking account!

What can you offer to help them with? A phone call or email. Stay in touch with your members and prospects! It is another opportunity to synch up with your membership. We get request for people to be a mentor/mentee. Get requests for CRM or IGP mentors from our mentorship program. We matched 95 groups in last session.

Member Engagement:

- Happy hour. Social event
- Mentoring
- Bring your own boss
- Business partner
- Workshop awards
- Engage rapid fire session
- Spotlights
- Demo on how they make boxes

Session Poster on Recruiting Members: Break out led by Randy Aust:

- Booth at an event
- Incentives for bringing visitors

- Get business partners to help
- Partner with similar organizations, bar association
- Career days in HS and colleges
- Provide presentation at college and HS
- Joint meeting with similar organizations
- ARMA prospect campaigns
- Use linked in to find prospective members
- Use the non-chapter members list (formerly 099 list) to get members
- Advertise the virtual meeting
- Contact re-instatements (former members)
- Work the renewal lists
- Content is so important to attracting and retaining members!
- Offer incentives to become a member!

Session poster on Maintaining Members:

1. Engagement
 - a. Welcome new members
 - b. Focus groups to secure ideas for engaging members.
 - c. Use Surveys tools like Survey Monkey:
 - i. Find out what they would like in chapter. Did you like the meeting?
 - d. Diversify the feedback!
2. Recognitions/appreciation
3. Provide incentives:
 - a. Free membership to local chapter
 - b. Offer them a free lunch at chapter meeting
 - c. Early bird or renewal discount
4. Keep them engaged once they become a member!
5. VIP Discount: pay for 8 meetings and attend all 10!
6. Auto-Renewals
 - a. Monthly breakdown on fees & Cascading fees.

Session 5 on Day 1: Volunteer Engagement Panel Discussion with Earl Rich, Katie Phelps & Tom Forsyth

1. Top Goal: Get members involved and especially to get new members involved early!
 - a. Involved and engaged members are more likely to stay a member!
 - b. Get members involved on a chapter committee or with a specific role in a chapter activity such as registration at a chapter meeting or seminar.
 - c. Line them up with experienced chapter members to become comfortable in their roles.
 - i. Serving with an experienced member is a form of mentoring!

2. Ways to reach potential volunteers:
 - a. Volunteer Survey or even General Member Survey
 - b. Talk to the new members and get to know them and their interests/skills/needs, etc.
 - c. Find out about their interests or what they enjoy to match them with the ideal job/task!
 - i. If they like to write then writing PR releases or newsletter editor is a good fit!
 - ii. If they are good with technology, then maybe the website is the right job!
 - d. Ask them personally as a chapter leader. Let them know you have confidence in them!
 - e. Learn what they are looking to get from ARMA. Are they looking to advance their career?
 - f. Talk about what service to the chapter has meant to you and what it can mean to them.
 - i. Let them know that serving as a volunteer can & will help them with improving their Leadership, Communication and interpersonal skills!

3. Volunteer recognition & Incentives:
 - a. Recognize them in front of their peers.
 - b. Reward them with something
 - i. Certificates of Service
 - ii. Chapter points for prizes
 - c. Special chapter logo to give chapter volunteers

Session 6 on Day 1: BOD Role Training Break Out Sessions

President/VP Role:

The Chapter President is the CEO. It is his/her role is to lead the other leaders. The President must be able to delegate.

Executive VP is President in Training. The VP is learning the ropes from the President.

Contact wtbasinger@gmail.com for any questions on this role!

Membership:

- Engage them early and often
- Provide financial incentives
- Career and Personal and Professional Development
- Role Model the behavior
- New member orientation packet

Programs:

The best way to do seminars:

- Secure Volunteers and Identify Committee members
- Lead by committee
- Plan Early
- Location, location, location!
- Plan your material (programs and speakers)
- Reach out for support!

Marketing/VP of Public Relations Role:

This role is often responsible for the chapter's website, newsletter and social media presence. The role in some chapters is also responsible in some chapters for business partners (vendor) relationships. Community service projects also fall under the role in some chapters.

The main topics discussed in this break out include:

- Communications challenges
- Generating newsletter on a regular basis (monthly quarterly) that also includes meeting notes.
- What resources should go on a members-only web page?
- Learning how to user and administer the Groups Section on ARMA International website.
- Challenges in managing both website and email communications. Often different technologies are required for these functions.

Session Notes Day 2 - Friday 06/29/18

Session 1 on Day 2: ICRM – Wendy McLain

CRM IGP or CRA credential shows you have the ability to follow through. You have commitment to the profession. CRA is an alternative credential.

ARMA is best source for education to prepare for CRM/CRA

You can contribute as a presenter on all or part of prep course outside of region at conferences like ARMA, NIRMA, NAGARA, AIIM and MER.

Session 2 on Day 2: John Spencer – Communication Skills

Relationships enhanced by the use of soft skills and emotional skills. It makes it easy for people to collaborate with us.

If the reaction we get is unfavorable, we won't be successful.

Day to day interactions are positive.

Make people want to work with us. Emotionally flexible.

Traditionally, we invest a lot of time to become SME.

Success comes down to behavioral impact on other people.

Being a trusted advisor is more than having good advice.

Being about to deliver the information we have so people **want** to listen.

What sounds like common sense is not always common practice.

Navigate thru emotional intelligence landscape. Stimulate further action.

WIIFM?

- Gain competitive advantage
- Improve work relationships
- Be influencer in your co.

Soft Skills – right brain emotional center. Get along with people on emotional level. How we behave or our attitude.

2 categories

1. Self-management side: How we handle relationships with other people. Stay calm in stressful situations especially if we have setback. Adapt behavior on what situation dictates. If we don't manage self then we can manage other people's emotions.
2. People skills – skills that enable you to interact with others. In meaningful work relationship. What are your emotions? Be able to work with wide range of people regardless of personality or talents. Personal filters: how we see things. It is just your perspective. It doesn't make it right.

Consider the following influences:

- Cultural influence
- Gender
- Age
- Educating
- Family dynamics
- Self-management:
- Emotional intelligence
 - Self-awareness
 - Self-regulation
 - Self-motivation
 - Stress management
 - Empathy
 - Social awareness
- Relational diversity
 - Cultural
 - Age
 - Gender

Common Myths:

- There is no place for emotions in the workplace
- We don't have time to talk about other people's feelings
- Other people cause our feelings. We have no control over how we feel
- No one can make you feel a certain way.

Cost of negative behavior

Which gender is more emotionally intelligent? Neither. Both are equal but will different pre-dominant traits.

Women:

- Empathy
- Social responsibility
- Interpersonal

Men:

- Self-confident
- Assertiveness
- Stress tolerance

Emotionally Intelligent people use their thinking and behavior to guide their emotions rather than letting their emotions dictate their thinking and behavior.

Empathy. Can you put yourself in other people's shoes?

Understand where other person coming from.

Self-awareness people who understand who they are and how they are seen.

95% think we have good self-awareness. Only 10-15% actually have it.

Is there an assessment?

11 has a quiz. Tell you where you are. What your overall rating is. Help you with self-awareness.

Where you are?

360 review. Having someone outside look at you. Helps you to be objective. It is also not good to have someone who is not self-aware themselves to judge you.

Bill with Access. At sales summit. All results. Lot of people who were surprised by the assessment.

DISK profiles.

Put our highest traits on the door.

We fall back to old habits.

Challenge yourself to make sure you are improving. "The hardest victory is over self"-Aristotle

Example how you make appraisals. Appraisals – your personal filter.

How your behavior and body language impacts others.

Find loving critics. Reality advisors

Issues emerge when reality and perception of reality come together.

Practice self-evaluation and reflection.

Signs of high IQ:

- Evolution of business relationship
- SME to Valuable resource to trusted advisor

The Trusted Advisor book: It is emotional duet between advice give and client.

If you don't respond with client emotions, you can't be trusted advisor

Emphasize more on relationship than the outcomes.

4 behaviors to be successful.

1. Choose to be visible – Listen up! You can tell if someone paying attention. Are you engaged? Listen like Alexa. Always getting smarter and adding new features/skills. Value the message by valuing the messenger. Speak up and leverage your voice. Relevant/timely, intelligent, solution focused. Establish your personal brand. Network and build relationships.
 - a. Networking plan: everyone is important, have purpose, who should I meet? Prepare questions, be memorable, create nucleus of supporters.
2. Choose to be easy
3. Choose to be ready
4. Choose to be useful

Don't get mad, get even – tempered!

What watch you say and how you say it.

Say what you mean, mean what you say don't say it mean.

55% body language, 39% vocal tone 7% what you say

Are you making it easier for people to get along with me?

Tone goes into texting, IM, emails.

Carrie, watch certain situations. High stress events. Be careful with your filter what you say.

Understand your manager's goal.

Add unique value – be essential.

What is your unique value?

Treat every day like a job interview.

People's positive promotable perception of you.

Session 3 on Day 2: Services and Tools from HQ by Heather Lehman

In a survey of chapter leaders, 27% report an increase in # of chapter leaders who consider their chapters to be healthy.

1 on 1: 1 minute like “Has your members logged into our website?”

Every chapter leader is subscribed to chapter connections notices.

New chapter offices report must be completed using the new chapter update form. It is online form.

Questions:

What communications do they need from us? The chapter update form is due July 1.

Who is responsible for form? Incoming president or outgoing president.

Ask region director to send all the reports to us!

There will be new region reports on who and what officers in what chapters.

Micro-volunteering: Started with new member welcome calls and mentorship program.

Chapter tactical advisory group. People who help us with ideas.

What is useful for the chapter?

ARMA is providing tool kits to help chapters:

- New members
- Recruitment
- Retention

Reviewing resources on Chapter Central –

- Position-specific training.
- Communication calendar

Session Posters:

- Social Networking
 - Happy Hour
 - Volunteer Recognition Awards
 - Animal Shelter
 - Habitat for Humanity
 - Homeless
- Mentoring
 - Bring your own Boss (BYOB)
- Elevator Speech
- Workshop
- Rapid Fire Sessions
- Local annual conference like Houston Conference

- Business Partners bring value:
 - Spotlight
 - Train the trainer
 - Demo new technology
 - How is it made?

4th Session on Day 2 - Social Media with Katie Phelps, Anita Castora and Ciro Flores:

The Big Three in Social Media are: Facebook, Twitter & LinkedIn. YouTube is also considered a Social Media platform.

You can post one time and hit 3-4 mediums with a single post. You go to settings to set it up.

Social media director is likely to be a tech savvy person. Orlando has 4 folks who post to their websites.

You should post once a month if not multiple times a week. An example of a post is a shout out that the Orlando chapter gave to two new CRA's in the area.

Carrie from Baton Rouge said that SM is good way to get in touch with members if you have a disaster.

Do you monitor what is posted on your SM account? Be care how personal it is and not to use PII.

One of best reason for Social Media is calendar ability. You can create events like chapter meetings so that visitors will know you are doing these things.

SM can be a tool to see how interested folks are in what you are doing by seeing how often it is being shared.

Facebook live meeting is another tool with Facebook. One of the chapters held an appreciation meeting and streamed it on Facebook Live. They had 12 people watch it.

Houston used it for a local celebrity program. A lot of people got to hear his speech using this tool.

SM allows you to connect with unusual suspects.

18 chapters are using Star Chapter. It offers membership database, the ability to send out emails, download lists and a website. It is easy to access and offers links to SM. There is a one-time fee for lite (less than 100 members) and a per month fee of \$50. Metro New York chapter uses it. It is a great tool for sending out notices. ARMA International has a website available. ARMA plans to offer a website tool that is WordPress at a cost of \$250 a year. It is coming out soon. Austin chapter had negative experience with star chapter.

Austin chapter uses mail chimp for emails and it is free. Orlando uses mail chimp as well.

You should have multiple people posting content. Linking to other chapters and their post. Get content into your chapter that way.

Auto calling service. \$50 for 500 tokens. Call tree is another option.

Having a link to the vendor webpage on your webpage is also a good idea.

Session 5 on Day 2: Region Breakouts - Southwest Chapter President Reports:

Dallas Chapter

Kelly O'Brien with the Dallas Chapter gave these updates:

- Dallas has a welcome info table at chapter meetings. They also put placards on tables at chapter meetings with one of the 10 principles.
- Member spotlight at every other meeting with Facebook post acknowledging the member.
- It is their 2nd year using Star Chapter.
- Volunteer recognition: They put volunteer's name in hat for gift card each month. Their names also go on a rolling slide presentation at chapter meetings.
- They are using a workflow tool to facilitate submission of reports by board members.
- Records 101 workshop in the fall. It was given by Nick Ingliss
- Spring Seminar was a joint seminar with Ft. Worth. It was a team building session at the Escape Room.
- The chapter started using twitter. It is hard to keep on top of it.
- Sent donations matched by chapter to Houston.

Austin Chapter

Chapter president reported 120 members. They held 5 chapter meetings including a social networking event. Chapter put on three workshops on RIM Basics, Vital Records and Share Drive Clean-up Program. The chapter has a lot of state and local government employees. We had tour of state cemetery.

Shred Day Stats: 100K lbs. of paper. Cash donations of \$10691 of which \$2,200 went to Operation turkey and \$3,105 to a Central TX food bank. The chapter partnered with AARP and saw a 43% increase in cars. They served over 2300 cars.

Austin chapter members participated in two conferences: Identitech (an IT professional conference) and eRecords conference, which is a Texas state archives conference.

Baton Rouge/Lafayette:

Programs this year including:

- Topic from IRCM used as programs. We related ICRM topic to how you how you put this at work in your office. This is module and how to apply it in practical sense.
- Seminar on PM.
- This year principles. Upcoming year, IGP.

There are 35 members in BR/L chapter. We gave a lot are government members.

Amarillo:

Amarillo is ready to go back to pump up our membership and activity. Definitely need to be helped and held up for the next year.

MBH: How can we help? ½ day workshop presentation to the city of Amarillo. Video recordings for meetings were we can go to your meeting.

The Amarillo Chapter had a keynote speaker funded by the region for its annual seminar.

Amarillo College has PBS station and FM radio station.

Our chapter relied on Pantex for members. However, Pantex has changed with new management. Amarillo has 18 members; 10 of which are from Pantex. They have \$5000 in account. They will apply for region and HQ grant.

Tyler Selle of Dallas will volunteer to help Amarillo with marketing; Vicky Stephens with Austin will help with speakers.

Amarillo needs help with Website and SM.

Houston:

Beverly reports Houston membership at 246. The chapter acquired 17 members. Concern with membership retention.

Focus on retention and recruitment. Only small group of members participate.

10 workshops. All well attended. Decrease in the attendance at workshops and meetings.

Conference – 177 attendees. We will share speaker list. 27 sessions; 30 speakers.

Community archives project in morgue.

The chapter made donations to literacy for kids which included money for elementary school reading supplies.

Monthly meetings for CRM candidates. The chapter had one new CRA in past year.

Fort Worth:

James Northway who manages the chapter website reports the chapter held 8 chapter meetings this past year. Midyear XTO relocated from Ft. Worth. Meetings went from 30 to 15 or less.

Chapter goal is to new members. The chapter needs to expand to banking, legal and energy.

Two charities. Single mothers and families.

Greater New Orleans:

Emily reports the board has a full slate of members. GNO purchased zoom. They use zoom tool for meetings. It has helped them to obtain some quality speakers in live sessions. GNO is a geographically divided chapter.

San Antonio chapter:

SA has a brand new board. Last January, the chapter started holding meetings in different locations to increase participation. The chapter had trouble recruiting board members. We lost members as well. We have a monthly donation at the chapter meetings. We collect what chapter members can give and donate to the domestic violence area of the SAPD.

Session 6 on Day 2: Selling your Brand – RIM program by Earl Rich

Use the concept to sell your chapter as well.

You've got problems and I've got solutions.

Establish a brand. What makes me different?

First is trustworthiness and proven track record and to be respected in your field. One way is to be on your board.

Delivery method – you have to be empathetic. Let them know you care. You have to be assertive (neither passive nor too aggressive).

RIM to Executive:

- Cost of compliance vs. noncompliance. Level pain points.
- Trust
- Data Breach
- Litigation
- Data access
- Storage costs

Final Wrap-up Session:

- Points about planning next year's RLC
- Time of the year: Perhaps later in July
- Venue: Give us your feedback on the surveys
- Travel safe!