

ARMA International Educational Foundation

*Your
Foundation
for the Future*

Creating a Legacy

Prospectus



Your Foundation for the Future

The ARMA International Educational Foundation is a funding resource for individuals and organizations and is devoted to supporting education and research initiatives that promote the advancement of both information managers and the information management profession.

The Foundation's top priority is to fund research and educational programs that will benefit both the information management practitioner and the profession. By establishing the **Your Foundation for the Future** endowment campaign, the Foundation trustees have taken the first critical step – laying the groundwork and establishing a legacy for a more beneficial and growth-oriented future.

Success is dependent upon support from practitioners, vendors, educators and educational institutions, professional associations, and organizations both within and outside the information management community.

Our Vision is...

to maximize the value of information management and make a positive contribution to the global perception of the information management profession

Our Mission is...

the advancement of knowledge in the field of information management through the funding of research and education

Our Strategic Goals Are...

- *to support research to address critical issues in information management*
- *to provide education development grants to enhance knowledge, skills, and abilities of practitioners in the field*
- *to foster educational initiatives that develop information management skills and programs*

Executive Overview

Records and information are corporate assets and are the lifeblood of organizations in today's global economy. The ability to record, quickly access, and share information assets is critical to the success of every organization. Institutional restructuring, greater reliance on computers, digital technology and the Internet, and the changing needs and expectations of customers are quickly changing many traditional approaches to information management.

This rapidly changing business landscape has created both challenges and opportunities for information management professionals, making it imperative that they have the knowledge and ability to adapt quickly to change and to provide the insight that is critical to an organization's strategic decision-making. Information managers today require creative thinking, new perspectives, and new products and tools in order to deal with the challenges that confront them. To keep up with this changing environment, there is a need for quality research, useful outcomes, and a comprehensive body of knowledge.

The ARMA International Educational Foundation's purpose is to answer that need by soliciting for and funding that research and providing a vehicle through which conclusions can be tested, documented, and communicated to the information management community.

The Endowment Campaign

The information management profession faces new and increased demands and it must be equipped to respond in a comprehensive and strategic fashion. It is critical to the profession that the Foundation fulfill its mission to provide funding for education and research. Permanent, self-sustaining financial resources will enable the Foundation to consistently fund those activities that are most needed and position itself to provide a solid legacy and a funding framework that will benefit the profession well into the 21st century.

Therefore, the ARMA International Educational Foundation has launched a five-year, \$1.5 million endowment campaign ... **Your Foundation for the Future**. Contributing to this campaign's initiatives provides opportunities for the information management community to support its own future and for organizations to have access to professionals who can give them the competitive advantage of strategic information asset management. The opportunity to participate is NOW.

The Foundation is seeking corporate and individual contributions that can be made as one-time gifts or over a five-year period. Contributions can be made to the general endowment fund or to a specific initiative.

***It's Your Profession's Foundation...
It's Your Future!***

Program Initiatives and Investment Opportunities

The ARMA International Educational Foundation offers significant opportunities to invest in the future of the information and records management profession. The major categories for investment contributions include:

- **Benchmarking and Trends Research**
- **Development of Education Guidelines and Standards**
- **Education Scholarships and Grants**
- **Academic and Applied Research**

Initiative I: Benchmarking and Trends Research

Organizations continue to look to the industry for benchmarking and best practices. To support these initiatives, the Foundation will fund surveys and trends analyses to raise the visibility of records and information management and to develop benchmark and measurement tools. Research will focus on but not be limited to

1. business trends and opportunities that will affect the information management profession, including e-commerce, digital signatures, privacy, and technology
2. development of information management models and metrics including
 - methods used to identify and apply the concepts of *recordkeeping systems* and *corporate memory*
 - consolidated models of institutional information management policies
 - tools to identify the relationship between information management practices and the value of information as a strategic corporate asset
 - a staffing model to determine the number of information management staff needed to manage information resources in organizations of various sizes
 - metrics for space planning, including formulas for determining floor load capacity
3. monitoring, measuring, and tracking methods and changes in recordkeeping needs and practices in modern offices including
 - electronic information retrieval and storage
 - functional reporting structures
 - recordkeeping activities
 - the implications of outsourcing

Project reports and related statistics will provide the basis for business articles, marketing and public relations materials, and industry white papers to raise the profile of information management and the profession.

Initiative II: Education Guidelines and Standards

In this era of the learning organization and the concept of lifelong learning, competency profiles are an important tool for information management professionals, their employers, educational institutions, and human resource professionals. Standards are also critical, as they serve as models or best practices that ensure the compatibility of systems, equipment, and procedures that facilitate business between partners and within multinational organizations.

Curriculum guidelines and standards will help educational organizations and associations develop relevant curricula, credential programs, and training opportunities. In addition, they will provide guidance for information and records management professionals in their education and career paths. Core competencies can be used to develop job descriptions and classifications, and distance learning opportunities will enable students to learn in a non-traditional environment.

Initiative III: Education Scholarships and Grants

The ability of information management professionals to access continuing education opportunities will become more important as the workplace demands more from its employees.

- **Academic Program.** To ensure that the profession has the best future talent, the academic tier will make funds available for students who are pursuing graduate, four-year, or two-year degrees, or special class work in an accredited university program in the field of information management.
- **Continuing Education Program.** The Foundation will provide grants for professionals to attend information management conferences, seminars, or courses providing continuing education units (CEU) or to take home study courses. Awards will be given throughout the year and will cover tuition, local travel, and course materials.
- **Certification Program.** These awards will be made to individuals pursuing professional certification in information management fields.

Initiative IV: Academic/Applied Research and Standards Development

ARMA International has created a vision for the future of the information and records management profession. The purpose of academic and applied research is to support this, creating a broader body of knowledge, addressing trends, and generating new courses by encouraging academic institutions to identify, study, and research practical issues related to the information management profession.

Topics include, but are not limited to

- strategic information management and planning
- asset management through information resources
- contracts and documentation
- enterprise-wide procurement and standardization
- legal and copyright issues related to intellectual property ownership
- electronic document and software analysis
- operations and security
- retention schedules for industry specific records and information resources
- assessing the impact of Web sites on access to and management of records

Investing in the Educational Foundation

Unless otherwise specified, contributions made to the Foundation go into a permanent investment fund. The interest earned on the invested principal will provide a regular, ongoing source of funding for the Foundation's initiatives. Funding of initiatives will depend largely on the speed with which pledges are secured and fulfilled and cash donations are received.

Based on current projections, the Foundation will spend on administrative costs approximately 15 percent or less of interest earned annually. (The generally accepted cost of operating a non-profit

CORPORATE	INDIVIDUAL	Examples of Schedules for Periodic Individual Contributions over Five Years	
		Quarterly	Monthly
Foundation Forum Cabinet 250,000+	Foundation Forum Cabinet \$100,000+	\$5,000	\$1,667
Foundation Forum Council \$200,000+	Foundation Forum Council \$50,000+	\$2,500	\$834
Foundation Forum Governor \$100,000 +	Foundation Forum Governor \$25,000 +	\$1,250	\$417
Foundation Forum Founder \$50,000 +	Foundation Forum Founder \$10,000 +	\$500	\$167
Foundation Forum Regent \$25,000 +	Foundation Forum Regent \$5,000 +	\$250	\$84
Foundation Forum Supporter \$15,000 +	Foundation Forum Supporter \$2,500 +	\$125	\$42
Friend of the Foundation \$10,000 +	Friend of the Foundation \$1,000 +	\$50	\$17

Figure 1

U.S. foundation is 10 to 20 percent of the interest from the permanent fund.)

As a supporter of the information management profession, and because of your interest in its continued health and stability, please consider joining with others who are investing in the future by making a *U.S. tax-deductible* pledge to the *Your Foundation for the Future* endowment campaign.

The Forum on Professional Excellence

Those who contribute to the *Your Foundation for the Future* campaign at the levels shown in Figure 1 will be designated as members of the Forum on Professional Excellence of the ARMA International Educational Foundation. Investment commitments will be recognized publicly, in accordance with the investor's wishes and the level of commitment.

Investment Options

Cash Pledges

Cash pledges from individuals or business organizations may be budgeted over five years or as a one-time, lump sum gift. The income tax benefit occurs in the year when the cash payment is received by the Foundation. Tax receipts are prepared for donors each year. Individual donors are encouraged to increase the value of their cash gift by taking advantage of matching gift programs offered by their employers.

Gifts of Resources Other than Cash

Contributions of other assets, such as stocks, bonds, real estate, or life insurance, may also be applied to the *Your Foundation for the Future* campaign goal. Appreciated securities not only provide immediate income tax savings, but they can also eliminate capital gains taxes on appreciation.

Planned Giving

Planned giving is encouraged, and the Foundation can accept cash or other resources from estates.

Sponsoring a Foundation Initiative

Individuals or organizations may choose to sponsor a Foundation initiative. Each named investment in the *Your Foundation for the Future* campaign will be recognized according to the level of investment and the expressed wishes of the donor. Investment levels are as follows:

- **Benchmarking and Trends Research**

Sponsorship of a specific survey will require an investment of \$250,000, which will be payable in annual installments of \$50,000 over five years.

- **Education Guidelines and Standards**

Sponsorship of an education guidelines and standards program initiative will require an investment of \$50,000, payable in two annual installments.

- **Education Scholarships and Grants**

Sponsorship of an educational scholarship or grant requires an investment of \$50,000. The grant or scholarship disbursement will equal the annual income earned on the \$50,000 investment and will not be awarded until the third year after its establishment unless the \$50,000 is gifted in one lump sum.

- **Academic/Applied Research**

Sponsorship of a specific academic research initiative would depend on the estimated cost of the project but would require a minimum investment of \$100,000 that would be payable in annual installments of \$20,000 over five years. The research grant would not be available until the third year following the investment unless the \$100,000 is gifted in one lump sum.