

Keywords

Website:
www.armamar.org

Volume XXXI X Issue V III



May 2010

Mark Your Calendar

MONDAY, MAY 3, 2010 MEETING

PLACE: Snyder's Willow Grove
841 N. Hammonds Ferry Rd.
Linthicum, Maryland 21090

TIME: 5:30 PM
Registration
&
Networking

6:00 PM
Dinner

Choice of:
Maryland Crab Cakes
OR
Roast Prime Rib
AND
Salad, Baked Potato, Broccoli
AND
Dessert

6:45 PM Announcements & Speaker
(See pg . 2 f or **Additional Information**)

COST: Members: \$35.00 Guests: \$40.00

RSVP: By **WEDNESDAY, APRIL 28, 2010** to
Linda L. Staub via phone: 410-997- 3982 ,
Evite, or email: lindastaub@gmail.com

**Please notify Linda for special dietary request*

DIRECTIONS: Take Exit 8 off of Baltimore Beltway (695)

NOTE: If you make a reservation for dinner and do not attend, you are responsible for payment to the Chapter.

GBMC ARMA
P.O. BOX 207
Simpsonville, MD 21150

Keywords is the official newsletter of the Greater Baltimore Maryland Chapter (GBMC). The Chapter's official address is above. The Keywords newsletter is published monthly from September through June of each year.

GBMC/ARMA is not responsible for the opinions of writers of articles published in this newsletter.

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THIS MONTH'S SPEAKER: ROB SCHMIDT

“Document Recovery and Planning”



Rob Schmidt has been brought on as Business Development Manager at Rapid Refile to head up growth into the areas of Pennsylvania, Maryland, Washington D.C., Delaware and Southern New Jersey. He began his career as a claims adjuster for Selective Insurance out of their Chesapeake Branch, in Hunt Valley Md. He managed a maximum workload with claim amounts exceeding \$1 million dollars on a variety of claims in the Maryland, Virginia, Delaware and Washington D.C. jurisdictions. After 2.5 years on the insurance company side of the business, he decided to make the change to the Insurance Broker side of the business. Rob worked for six years as a commercial insurance broker for Miers Insurance, in Allentown PA. Over the years, he again managed his clients claims, which had reached over the million dollar threshold.

One of Rob's most valuable assets and enjoyments is providing Risk management to his customers and prospects. He has had extensive training in risk management and has implemented countless disaster preparedness plans. He will continue to work on disaster plans in his new capacity.

Work experience:

Many Lehigh Valley Colleges and Universities in Disaster Planning
Large Candy Manufacturer in Business Continuation planning and Disaster preparedness planning.

Accomplishments:

Qualified as a preferred vendor for multiple insurance carriers and associations such as:
Travelers Insurance
Penn National Insurance
Princeton Insurance Company
Lehigh Valley Association of Independent Colleges

Education:

B.A. History, Muhlenberg College 2001
Secondary Education Certification, Muhlenberg College 2001
Property & Casualty Insurance licensed

From the Desk of the President... As I see it...

Moving Forward

It has been a chaotic past few weeks, full of ups and downs. April was a month where we as an ARMA Board had to step back and mull things over. We were very ambitious in planning our Spring Seminar which was to be held on the 26 of March. Unfortunately, we were not able to get the attendees we expected so on March 19 a week before the scheduled seminar, we had to make a decision to cancel our seminar. The Board will be meeting to review plans for a Chapter seminar and discuss recommendations and we will be sharing our findings and decisions with you - our Chapter members. If you are interested in assisting with the planning please let a board member know.

Our Vice President of Programs, Greg Chalmers did a pretty expert job in planning much of the details for our seminar. Planning a successful seminar is a complex undertaking and Greg was great with managing the details and he was a lamb to work with. Thank you Greg.

Thanks to all of you who had signed up for the Seminar and for your patience.

Moving forward, we encourage you all as members to make a more serious commitment to the GBMC of ARMA. We are always looking for new members to serve on the Board and to bring fresh ideas and new contacts to our meetings. We need your help.

We look forward to seeing you next month for our last Chapter meeting for the year ...that is until September. We will be installing new officers. That meeting is scheduled:

6:00
Monday, June 7, 2010
BWI Ramada Inn & Parkstone Grill
7253 Parkway Drive
Hanover, Maryland

Trust you're enjoying these beautiful days of Spring!

Linda



The Blended Solution: Integrating Digital and Hard Copy Document Management

Business documents are the lifeblood of every organization, regardless of industry. They are intellectual assets that drive strategic business processes, and as such, must be easily accessible as well as protected. However, most document solutions vendors have a one-dimensional view of document management, providing either offsite hardcopy document storage or digital conversion and archival via a web-based repository. In reality, neither of these alternatives by themselves is the complete solution.

As desirable as it would be to migrate to a completely paperless environment, the fact is that paper continues to be a major piece of the critical information infrastructure of an organization. It is still a key component driving most business processes and supplements digital workflows.

Maintaining and managing all of a company's important records in one format fails to recognize the reality that most organizations have many years of both paper and electronic documents, requiring that they retain both digital and physical archives. While the long term goal is to convert paper documents to electronic files, the immediate need is for a blended solution that allows integrated management of documents and records in a variety of formats – however and wherever they are needed.

In most companies, documents exist in multiple locations, a number of different formats and media, and are managed by several systems and processes, both automated and manual. Rather than eliminating paper, the innovations brought about by technology have created even more in a lot of instances. And the number of paper documents created each year is continuing to rise. In this environment, organizations need a single integrated approach to classify, apply retention policies, and store their records according to fiscal, legal, and regulatory requirements, whether paper or electronic, active or inactive.

Integrated document management is not limited to one storage or conversion methodology, but is a blended solution tailored to the short and long term requirements of each customer's business. It is a systematic approach that creates a document storage, records retention and protection strategy that matches an organization's needs for archiving, accessing, securing, and managing their critical business data. To achieve competitive advantage in today's economy enterprises must manage their documents so they can be effectively utilized to attain organizational goals, and only a vendor that manages the complete lifecycle from content creation to disposal can meet this objective. This approach also addresses the most important priorities in today's document management environment.

Information Security, Privacy & Compliance.

With data becoming more decentralized, distributed through a variety of electronic and physical means, and a more mobile workforce, information security and privacy issues are becoming a top priority for every organization. With new legislation mandating how confidential records are accessed, used, transmitted, and disposed, organizations must move quickly to protect their documents, whether in paper or electronic form. This includes developing a comprehensive document privacy protection plan, outlining the processes and controls for maintaining chain of custody over critical records.

Managing Document Retention Policies

Records retention has recently become a hot topic for enterprises in all industries, primarily due to the increasing number of statutory requirements and legislation governing this area. The cost of poor retention practices can be in the tens of millions of dollars in fines, as some companies have learned, for noncompliance with Securities and Exchange Commission retention rules.

(CONTINUED ON PAGE 5)



However, a responsible records retention policy is not just about retaining records, it is also about records destruction. If a record is retained too long, it can also be expensive, as companies expose themselves to litigation risks, and could also be violating privacy rights. Although some high-profile court cases brought the records retention issue to light, the implication is clear: an integrated approach to managing all of your documents is the only way to gain control over the number of physical and digital records in existence and those being created on a daily basis.

Disaster Recovery

Enterprises run on their data, and the value of critical documents and records grows each year. With this vital data stored in both paper and digital formats, in multiple locations, it becomes an absolute requirement that These records be protected by a common, integrated document management solution. Internal practices and business policies currently in place may no longer be adequate to meet disaster recovery requirements, and they may not meet the security and retention standards of an auditor. An integrated strategy of off-site storage combined with a secure electronic document repository, ensures businesses that their records are secure, documents can be controlled and tracked, audit trails are in place, and their business continuity, data retention and security requirements are being met.

Litigation

According to the Third Annual Litigation Trends Survey (October, 2006, Fulbright & Jaworski LLP), eighty-nine percent of more than 300 U.S. companies had some form of litigation pending. Most of these companies were not prepared to provide the level of document discovery required in either a civil case or a regulatory investigation. With both paper and digital documents residing in multiple storage facilities and repositories, with different management practices, tracking capabilities, search tools, and retention and destruction policies, it is virtually impossible to comply with discovery requirements in a timely manner. The only reasonable approach to effectively meeting these requirements is a blended solution that manages all forms of documents, whether paper or digital, stored in an electronic repository or in an off-site facility.

Mergers and Acquisitions

The trend in some industries toward accelerated merger and acquisition activity has put an increased focus, as well as burden, on effective document management. These transactions increase the need for an integrated storage management solution, as paper documents will be stored in physically different locations without a common tool to control, manage, or access records. Digital documents will reside in different repositories, usually accessible through separate software applications, with no common document management or integration. With eighty percent of an enterprise's data existing in the form of documents, files, images, and other similarly unstructured content, it is critical that an integrated approach be taken to ensure uninterrupted processes, proper compliance, continued customer loyalty, and full realization of the benefits of the merger.

Conclusion

In today's document-intensive environment, with the conversion and management of an increasing volume of both paper-based and digital information, it is critical for organizations to utilize the expertise of a company providing a blended document storage solution. While a lot of vendors offer either hardcopy storage or a digital document repository, neither of these services provides the complete document management solution. With the increased demands of information security, privacy and confidentiality, regulatory compliance, document retention policies, and disaster recovery, coupled with an organization's budget and space constraints, an integrated, blended approach is an absolute requirement.

ARMA International Web Seminars:

- [Developing Litigation Holds](#), April 26-May 4, 2010
- [GARP®: Principle of Integrity](#), April 27, 2010 - 11:30 a.m.–12:30 p.m. (CDT) - **Live!**
- [Privacy and Security Regulations: What Are the Implications to RIM?](#), May 3-11, 2010
- [Roadmap to Successful eGovernment](#), May 17-25, 2010

Questions? Contact headquarters@armaintl.org or +1 800.422.2762

Title: Developing Litigation Holds

Experience Level: 2

Competency Domain: Risk Management

Facilitator: John Isaza, Esq.

Registration Deadline: 12:00 p.m. (CT), Friday, April 23, 2010

Viewing Period: Monday, April 26, 2010 – Tuesday, May 4, 2010

This litigation hold web seminar will offer a step-by-step approach designed to help participants recognize when an organization should preserve records (both paper and electronic) relating to government investigations or litigation.

Participants will study factual scenarios taken from known examples to work through the litigation hold process.

Participants will learn to analyze trigger events and take a systematic approach to investigating, identifying, and preserving evidence.

Upon completion of this web seminar, participants will be able to:

1. Identify common events that may require an organization to suspend its normal records retention policy and take steps to preserve evidence
1. Implement a systematic business process to investigate records relevant to the event and identify custodians
2. Plan the building blocks needed to implement an effective litigation hold
3. Take away practical advice to help their organizations implement legally defensible litigation holds

Facilitator Biography:

John Isaza, Esq., is a California-based attorney and partner of Howett Isaza Law Group, LLP, an international records and information management consulting practice and law firm. He has more than a decade of experience as a trial lawyer specializing in business, environmental contamination, products liability, and construction defects. Isaza is the 2008 recipient of the prestigious Britt Literary Award of ARMA International and is an active speaker in the ARMA and AIIM circuits.

To participate, you MUST register by 12:00 p.m. (CT), Friday, April 23, 2010.

[Click here to register.](#)

ARMA International Web Seminars cont'd

Title: GARP®: Principle of Integrity

Date: April 27, 2010

Time: 11:30 a.m. – 12:30 p.m. (CDT)

Speaker: Galina Datskovsky, Ph.D., CRM

Length: One Hour (Includes 45-minute presentation and a 15-minute Q&A session)

Sponsored by: Iron Mountain

The Principle of Integrity states that a recordkeeping program shall be constructed so the records and information generated or managed by or for the organization have a reasonable and suitable guarantee of authenticity and reliability. Integrity of records in a recordkeeping environment should include the following:

- Correctness of and adherence to the policies and procedures of the organization
- Reliability of the information management training and direction given to the employees who interact with all systems
- Reliability of the records created
- An acceptable audit trail
- Reliability of the systems that control the recordkeeping including hardware, network infrastructure, and software

Speaker Biography:

Galina Datskovsky, Ph.D., CRM, distinguished engineer and senior vice president of architecture at CA, Inc., an independent IT management software company that helps customers optimize IT for better business results.

Datskovsky has worked in the technology field for more than 20 years and is currently responsible for company-wide architecture and design initiatives at CA. She joined CA in 2006 with the acquisition of MDY Group International, where she served as founder and CEO from 1988 to 2006.

As a Certified Records Manager, Datskovsky is recognized around the world as an expert in records management and associated technologies. She is president-elect of ARMA International and is widely published, she is co-author of the book, *Under Control: Governance Across the Enterprise*, which was published in December 2009.

Attendee Takeaways:

The attendee will learn:

- The premise and applicability of integrity in the RIM environment
- The factors that contribute to the integrity within an organization
- The importance of an acceptable audit trail
- The critical components of a reliable system to control the recordkeeping

Ideal for:

- Records managers
- Corporate counsel
- IT management
- Compliance officers

To participate, please register by 11:00 a.m. (CT), Friday, April 26, 2010.

[Click here to register.](#)

ARMA International Web Seminars:

Title: Privacy and Security Regulations: What Are the Implications to RIM?

Experience Level: 3

Competency Domain: Risk Management

Facilitator: Denise Simons

Registration Deadline: 12:00 p.m. (CT), Friday, April 30, 2010

Viewing Period: Monday, May 3, 2010 – Tuesday, May 11, 2010

Each year, federal, state, and international laws are passed which restrict how information can be collected, how personally identifiable information is managed, and what happens to notification requirements when information security is breached or privacy policies change. This web seminar takes an in-depth look at privacy and security regulation requirements from the FTC, FCRA, FCTA, COPPA, GLBA, HIPPA, and trends in state and international regulations. In this web seminar you will learn:

- The effect these requirements have on organizations that collect or retain personal data
- The issues involved with outsourcing, mergers, or joint ventures
- The impacts of these requirements on RIM professionals

Learning Objectives:

Upon completion of this web seminar, participants will be able to:

- Identify privacy and security regulations impacting RIM programs.
- Identify the types of information that are regulated.
- Explain the trends in new state and international security and privacy laws.
- Summarize the impact of regulations on RIM programs.

Facilitator Biography:

Denise Simons has been in records management since 1983 and is the principal of Haystack Associates Inc., an information management and consulting firm. Her experience includes analysis, design, and project management during implementation of programs for security, privacy, retention, and destruction of electronic- and paper-based records and information systems.

To participate, you MUST register by 8:00 p.m. (CT), Friday, April 30, 2010.

[Click here to register.](#)

Title: Roadmap to Successful eGovernment

Experience Level: 2

Competency Domain: Information Technology

Facilitator: Jeffrey Johnson

Registration Deadline: 12:00 p.m. (CT), Friday, May 14, 2010

Viewing Period: Monday, May 17, 2010 – Tuesday, May 25, 2010

According to a recent McKinsey report, the U.S. Government is expected to spend more than \$71B on IT, of which 10% will be eGovernment related. While emails, instant messages, data files, document files, and scanned images are all vital to the Federal Government, storing and managing them—and their growth—is not a trivial task. Attend this seminar and gain effective strategies for managing both your paper and electronic records

Upon completion of this web seminar, participants will be able to:

1. Explain how to create and manage a fully-integrated program - with complete visibility and access to all of their federal records
2. Identify the unique best practices of the Federal Government and compliance standards, as well as continuity of operations
3. Examine what limits the effect of eGovernment efforts

[Click here to register.](#)

Facilitator Biography:

Jeffrey Johnson currently serves as the Senior VP and General Manager for Iron Mountain's Government Services and is responsible for managing the company's business and strategic initiatives with the Federal Government. Johnson and his team work closely with customers to bring Iron Mountain's innovative technology, services and solutions to the Federal Government industry. Johnson serves as a Board Member and/or Advisor for several for profit companies and is the Chairman of the Board for iCompassion, a Virginia non-stock corporation.

To participate, you MUST register by 12:00 p.m. (CT), Friday, May 14, 2010.

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**GREATER BALTIMORE MARYLAND CHAPTER
OF THE
ASSOCIATION OF RECORDS MANAGERS AND ADMINISTRATORS**

2010– 2011 BOARD OF DIRECTORS

The following are the members of your Greater Baltimore Chapter of ARMA Board of Directors for the upcoming year 2010-2011. These Board members will be installed at our June meeting.

President

Nomination Committee: o **Chad J. Doran, CRM**

Vice President of Programs

Nomination Committee: o **Allison J. Murrhy**

Vice President of Membership

Nomination Committee: o **Phyllis L. Pritchett**

Secretary

Nomination Committee: o **Angela Minturn**

Treasurer

Nomination Committee: o **Juernene F. Speights**

Board of Directors

3 Year Directors

Nomination Committee: o **Regina A. Martin**

Nomination Committee o **Valecia A. Winston**

2 Year Directors

Nomination Committee: o **Michael E. Perez**

Nomination Committee: o **Jeanne M. Upchurch**

1 Year Directors

Nomination Committee: o **Phillip K. Albert Sr.**

Nomination Committee: o **Kathleen R. Moyers, CRM**

Past Presidents

Linda J. Dorsey

Phyllis L. Pritchett

Kevin T. Elmore

ARMA's 55th Annual Conference & Trade Show will be held Nov. 7– 10, 2010

**November 7-10, 2010
55th Annual Conference and Expo
San Francisco, CA**

The premier event in the records and information management field, ARMA International's 55th Conference & Expo, will be held November 7-10, 2010, at the Moscone Center West in San Francisco, Calif. It's never too early to start planning for the 2010 ARMA International Conference & Expo, which delivers the resources and tools you need to better govern your information.

The 2010 ARMA International Conference & Expo is located in the [heart of downtown](#) San Francisco, at Moscone Center West. See the industry's emerging technologies as the [ARMA Expo](#) hosts over 200 exhibitors servicing the records and information management community. This a one-time chance to visit with companies offering solutions for electronic content management (ECM), e-records solutions, e-mail management, compliance, and archiving solutions. Follow the official [ARMA2010](#) Twitter Feed and join the conversations on our virtual conference network: [ARMA iConference](#).

Materials for publication may be submitted to Keywords editor at the following address:

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 National Center for Environmental Assessment
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 Arlington, VA 22202
 703-347-8644
 Winston.Valecia@epa.gov or
 Valecia.Winston@asrcms.com

The GBMC Board is currently looking into the possibility of planning a fall seminar. We will keep you updated as information becomes available.

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Member 10 Issue/ Month/ Newsletter	\$90.00	\$195.00	\$360.00	\$585.00