

Keywords

Website:
www.armamar.org

Volume XXXVII Issue V



January 2010

Mark Your Calendar

MONDAY, JANUARY 11, 2010 MEETING

**PLACE: Johns Hopkins University/APL
11100 Johns Hopkins Rd.
Laurel, Maryland 20723**

**TIME: 5:30 PM Registration & Networking
6:00 PM Dinner**

Pan-Seared Filet of Salmon
Oven Roasted Pork Loin
Balsamic Roasted Winter Vegetables

Served with:

Rolls and Butter
Tossed Garden Salad
Fruit Platter

AND

Turtle Cheesecake

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

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

RSVP: Please use the on-line Evite to respond by **NOON** on **WEDNESDAY, JANUARY 6, 2010** to **Linda L. Staub**; If you must reply via phone, please call 443-539-0219.

****Please notify Linda for special dietary request****

DIRECTIONS: Take 29S to Exit #15 (Johns Hopkins Rd). Turn right at JohnsHopkins Rd., then slight right at Sanner Rd. into Parking Lot. Enter main entrance and go to the Cafeteria—it will be in the **BACK** (Howard County Room).
NOTE: If you make a reservation for dinner and do not attend, you are responsible for payment to the Chapter.

GBMC ARMA
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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:

JOSEPH D. GRANDINETTI, Jr., Esq.

Document Retention Policies: A Business Necessity

Joe is the Founder and Owner of Technology Counselor (www.technologycounselor.com), a Northern Virginia-based consulting firm which assists businesses and law firms with technology related issues, specifically, the development and implementation of Document Retention Policies and Information Security for law firms, technology businesses, and governmental agencies. Technology Counselor offers an array of services focusing on issues critical to the creation and protection of documents and data, including, development and delivery of client-specific training programs.

**From the Desk of the President... As I see it...
"Springing Forward to Seminar"**

Happy New Year one and all!

With 2009 behind us, we are looking forward to 2010 and getting together at our Greater Baltimore Maryland's Chapter Spring Seminar to be held at the Johns Hopkins Applied Physics Laboratory campus in Laurel this March. I realize that so many of your Schedules are so busy this time of year, so please set aside Friday, March 26 for the Seminar. We will have our speaker lineup announcement in next month's Keywords. We are putting together an outstanding program featuring some of the industry's most talented executives from leading companies, such as Microsoft, ... and many more. The ARMA Board decided upon a theme for the Spring Seminar "Emerging Technologies & Records Information Management" and we are truly excited to bring together thought-leaders in the Records and Information Management industry and the seminar will be a day of practical, interesting and thought-provoking sessions.

"Our Programs Chair, Greg Chalmers is bringing forth brilliant, forward-thinking executives to come out to share their insights. I can't imagine anyone in records management feeling that they don't absolutely have to be at this event at this time to participate in discussions that not only will help shape the industry's future, but will help each one of us develop a plan to move forward successfully. This 2010 Spring conference already shows promise of knocking our socks off. As we move into the new year and advance into a new phase for our Spring 2010 Seminar countdown, at the Applied Physic Lab, we urge you to join us and register for this one day experience as soon as you receive the announcement. Please continue to join us at our monthly chapter meetings to stay on top of the latest announcements and updates in the electronics records and information management field from our speakers and keep high-fiving with hellos, and networking and making new connections.

Lastly, I don't want to forget the kindness and generosity from you—our Chapter members and guests who give each year to our adopted charity: the St. Vincent's Children Center in Timonium, Maryland where they provide intensive diagnostic, stabilization and treatment services locally and nationally to children, ages 3 to 13, and their families who suffer abuse. Kevin Elmore our GBMC ARMA Representative delivered cash, gift cards & checks from GBMC ARMA totaling \$1500.00 and given for gifts for the children. As I sit here in this chilly office, I know it is now only a matter of time until we will be feeling the warm spring and summer sun.

Here's wishing you a Prosperous New Year!

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.

This Month's Sponsor...

**Technology Counselor is our sponsor for the month of
January**



MEMBER SPOTLIGHT

Arthur de Lay has been a federal records management professional since 2004 and worked in the information management and library science arena since 2000. A native of New Orleans, Louisiana, he has worked in both the private sector for university libraries there, as well as the public sector while in the employ of the Law Library of Louisiana. Arthur now resides in the Mid-Atlantic having worked for several years as contractor to the federal government in support of the Environmental Protection Agency. He has worked with federal docket management systems, institutional repositories, enterprise content management systems and has drafted records procedural guidance manuals. Additionally, Arthur is trained in DoD records management practices.

The Greater Baltimore Maryland Chapter of the Association of Records Managers and Administrators (ARMA) is pleased to announce and invites you to:

Spring Seminar 2010

WHEN: Friday, March 26, 2010

**WHERE: Johns Hopkins University Applied
Physics Laboratory**

Kossikoff Center
Laurel, Maryland



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JOB POSTING

This is a **Position Specific Recruitment for the Maryland Department of General Services (DGS)**. This eligible list will be valid for this position only. Applicants interested in other positions in State service in this job classification should apply when they are posted.

Apply To:

***Department of General Services, Personnel Division
301 W. Preston Street, Room 1211
Baltimore, Maryland 21201***

RECRUITMENT FOR:

Director of Records Management (Administrator III)

Announcement Number: 09-2588-955

(List both the title and announcement number on your application.)

SALARY:

\$45,399 - \$72,857 (Grade 18)

The salaries referenced above are in accordance with the State of Maryland Executive Order 01.01.2009.11 – Fiscal Year 2010 State Employees' Furlough and Temporary Salary Reduction Plan.

LOCATION:

Jessup, MD

CLOSING DATE:

January 11, 2010

Applications must be received by the close of business

POSITION DUTIES: This position functions as the manager of the Statewide Records Management Program for the Maryland Department of General Services and oversees six employees in the operation of the State Records Center. The incumbent reports directly to the Secretary of the Department of General Services. This program develops policies and procedures to efficiently manage the records of all departments and agencies in Maryland State government and assists State, county, and municipal agencies in the establishment of records retention and disposal schedules. The State Records Center in Jessup provides efficient storage and service of inactive State records that must be retained for specified periods of time to meet administrative, fiscal, and legal needs. The manager also coordinates the Statewide Forms Management Program among government agencies and prepares related annual reports for submission to the Maryland General Assembly.

One of the key functions of the newly selected Director will be to oversee the development and implementation of an up-to-date electronic data storage and retrieval process for records management. The selected individual must be highly knowledgeable in the use of current technologies to achieve this purpose, and will possess the ability to effect major changes in our current practices of records retention.

This is a highly responsible professional position, and applicants are expected to possess the following:

- Expert knowledge of current principles and techniques regarding electronic data and records storage.
- Knowledge of and the ability to implement the fundamentals of records and information management, preferably in the public sector.
- Up-to-date familiarity with the standards and best practices in the records management industry.
- Knowledge of the legal and regulatory issues affecting the records management process.
- Knowledge of and the ability to implement effective information security practices.

JOB POSTING cont'd

APPLICANTS MUST MEET BOTH THE MINIMUM AND SELECTIVE QUALIFICATIONS.

MINIMUM QUALIFICATIONS:

Education: A Bachelor's degree from an accredited college or university.

Experience: **Five** years of experience in administrative staff or professional work. One year of this experience must have involved one or more of the following: the supervision of other employees, overseeing and coordinating the general operations of a unit, applying rules and regulations, or exercising responsibility for the development of policies or procedures.

Notes:

1. Additional experience in administrative staff or professional work may be substituted on a year-for-year basis for the required education.
2. Additional graduate level education at an accredited college or university may be substituted at the rate of 30 semester credit hours on a year to year basis for the required general experience.

SELECTIVE QUALIFICATIONS:

Three years of the required experience must be in performing duties within an established records management operation for a government entity or a large business. Possession of a CRM (Certified Records Manager certification) will substitute for the selective qualifications.

LICENSES, REGISTRATIONS AND CERTIFICATES: This position requires the selected individual to possess a motor vehicle operator's license valid in the State of Maryland.

RETURN COMPLETED APPLICATION TO: Department of General Services, Personnel Division, 301 West Preston Street, Room 1211, Baltimore, Maryland 21201. **Applications must be received by the close of business on January 11, 2010.** Applications may be obtained by visiting: www.dbm.maryland.gov

SELECTION PROCESS: Please make sure that you provide sufficient information on your application (and on separate pages, if necessary) to show that you meet both the minimum qualifications and selective qualifications for this recruitment. All information concerning your qualifications must be submitted by the closing date. We will not consider information submitted after this date. Successful candidates will be ranked as Best Qualified, Better Qualified or Qualified and placed on the employment (eligible) list for at least one year.

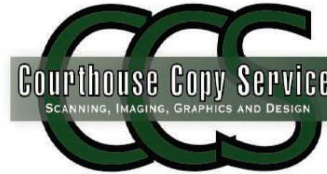
EXAMINATION: The examination will consist of a rating of your education, training and experience related to the requirements of this job. If you do not receive a request for supplemental information, the rating will be based on your application. Report all experience and/or education that is related to this job.

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

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