



## ***2005-2006 GNW Chapter Programs***

### **Greater Anchorage Chapter**

Annual Spring Conference – “**ISO 15489 & ANSI/ARMA Standards**” by Bill Millican of ARMA International.

Post Conference Workshop – “**Basic Preservation Techniques for the Records Manager**” by Emily Ramos, Ramos Library and Archives Conservation.

Tour of the Alaska Moving Images Preservation Association’s new facility.

“**The Sedona Conference, What Is It?**” by Renee Salvucci, CRM, Greater Anchorage Chapter Past President.

“**Recap of NARA Records Administration Conference 2005**” by Susan Means, Senior Records Analyst, NARA Pacific Alaska Region.

“**Don’t Forget the Paper!**” by Bruce Parham, NARA Archivist on preservation techniques.

“**File-Coding Structures**” by C’Les Jensema, ML&P Document Control Specialist.

“**Influencing, Convincing and Persuading**” by Alexandra Engman, from The Growth Company.

“**Standards for Electronic Records & E-Mail Retention**” by Jeffrey Schowen, CRM.

“**In-House vs. Out-Sourced Records Storage**” by Jesse Braendel, Records Analyst, Acumen Information Services.

### **Bellevue/Eastside Chapter**

“**IT Lingo for RIM Professionals**” by Nicole B. Smith. She presented a workshop-style forum on delving into the mysterious world of IT lingo, acronyms and the like to help RIM professionals get on the same page as their IT counterparts.

“**ARMA International and Beyond.**” Joint Greater Seattle/BEC meeting – ARMA International Conference attendees discussed their experiences in Chicago; Susan Priebe and Andrea Bettger gave a walk-through the ARMA International Website

“**Migrating Data**” by Nicole B. Smith. She presented strategies for moving/converting data from one storage system to another, and how RIM professionals can leverage off these types of projects to collaborate more effectively with IT folks.

“**The 7-Step Roadmap to Better E-Discovery Management**” by Joan Feldman. She provided concise step-by-step guidance to records managers on how to manage the increasing need to preserve and collect electronic records. Ms. Feldman also expounded on the many challenges faced by records managers who must respond to legal requests for electronic records.

**BEC Panel Discussion:** Chapter members Will Henson, Jennifer Winkler and Joe Ramsdell discussed email records retention and how they are tackling this monumental RIM issue in their respective organizations. This was a very interactive program, with heavy audience participation.



**“Moving City Hall”** by Donna Healy. She gave a presentation on the move of City Hall and the challenges/opportunities the records management staff had as part of this process. She covered in great detail maximizing the use of records management software, inventory management, developing enterprise wide retention schedules and installing a high-density storage unit.

**“Putting the Cart before the Horse”** by Jim Thai of OmniRim. He gave a presentation on why Records Management needs should drive your choice of ECM solutions. Mr. Thai gave a very informative, non-vendor specific talk that focused on the role and importance of compliance and legal requirements in corporate content management processes, the role records managers should play when evaluating and deciding on ECM solutions.

**“Emerging Document Management Practices in the Judicial Environment”** by Roger Winters. For the past 18 years, Roger Winters has been very much involved in fundamental changes in the handling of documents that constitute court case records. For King County Superior Court cases under the Electronic Court Records (ECR) program, the official record is now the scanned or e-filed document-paper, for the most part, is not retained. Since 1999, Roger worked with a group composed of court leaders, technologists, vendors, and academics, to develop standards for future electronic court records. He described the all-electronic court document and discussed how its use of XML (eXtensible Markup Language) technology opens the door to increased automation of data processing and brings other innovations in how documents can be used in judicial and other legal processes.

**“Case Study: Internal Email Pilot and Preview of New Records Management Features in MS Office 2007”** by Tina Torres and Jason Cahill of Microsoft.

#### **Boise Valley Chapter**

**“ARMA International”** by Michelle Morrison, Secretary. She discussed the benefits of ARMA such as programs, standards, committees, and education. We learned about the future and what would be happening in Chicago at the 50th anniversary celebration.

**“Public Records Law”** by Bill Von Tagen, Idaho Deputy Attorney General.

**“Electronic Records Retention”** by Craig Estano, DBSI. Craig works for DSBI group which owns the ColumbiaSoft Document Locator records management system. DBSI has begun a project to implement records retention within the system. Craig provided an overview of their approach to solving an Automated Electronic Records Retention system.

**“Electronic Records Disaster Recovery Strategies”** by Andrew Chroninger, IS Disaster Recovery Manager, Micron Technology, Inc. Issues that were discussed included: Disaster Recovery Strategies, Business Continuity, Incorporating Risk Analysis, Business Impact Analysis, Mitigation Strategies, and Response and Recovery.

**“Lifelong Learning: The Season Ticket to the Game of Life”** by Temple Beatty.

**“Electronic Records Systems Implementation”** by Lynnette Koenig from POWER ENGINEERS. She spoke on their move from predominately paper records to more of an electronic records system. The focus was on the drivers within POWER for making the move from mainly hard-copy based records storage to electronic records retention. Included in the discussion was:

- Warehouse space v. e-retention cost analysis
- Drivers for changing retention policies
- Goals & expectations of the new system
- Picking the implementation team



- Choosing the software & hardware
- Challenges, set backs, and frustrations
- Look and feel (front-end and back-end) of the final system

**“Medical Records and Issues”** by Cindy Andreason, Health Information Services of St. Luke’s Hospital.

**“Chapter Visit”** by Region Coordinator, Fran Baylock. Chapter Elections were held at the meeting.

**“Legally Defensible Retention Schedules”** by Judy Sitton, CRM, a consultant for PacoTech, Inc. In addition, she focused on the pros and cons of three models that are commonly used for records retention scheduling.

**Columbia Basin**

**“Identity Theft - A Policeman’s View”** by Lew Reed. Lew is a Richland police officer specializing in Internet related crimes involving identity theft, fraud, money laundering, online predators and related matters. Some of his investigations have resulted in the apprehension of individuals worldwide. He discussed his work and gave attendees advice which all of us thought to be informative and useful.

**“Re-licensing, a Big Dam Project!”** by Laurel Heacock, Laurel is an attorney and Manager of Licensing and Regulatory Compliance for the Grant County PUD which owns and manages Priest Rapids Dam on the Columbia River north of the Tri-Cities. Her presentation included information about her project, record keeping to meet federal, state and local requirements, the project library and related matters.

**“Records Management at UMCDF - It really is Rocket Science!”** by Susan Ash and Jim White. The Umatilla Chemical Agent Disposal Facility located near Hermiston, Oregon, has a mission to safely destroy a large segment of the nations cold war chemical arsenal. Susan, Configuration Control Manager and Jim, Information Resources Supervisor, explained how the records of this complex and heavily regulated project are being managed.

**“Imaging 101 and Beyond”** by Kathleen Fish. Kathy, a long time ARMA and AIIM member from Olympia, and a popular speaker, provided our attendees with basic information and news of the latest technologies in electronic document management.

**Oregon Chapter**

**“Getting Ready For Trial”** by Edward S. McGlone III, Senior Legal Counsel, Clackamas County. He presented important information you need to know to help your organization prepare for trial, and to prepare yourself if you are required to provide testimony, including:

- Outline of the trial process and the steps of pre-trial preparation;
- How a litigator may prepare you to provide testimony in a deposition, or as a trial witness;
- The process of legal discovery and how electronic discovery differs from the discovery of paper documents;
- How to ensure the complete capture of all relevant trial evidence;
- How e-records, including e-mail, instant messaging and other formats, are changing the face of major litigation today;

**“Tour of the Multnomah County Archives”** by Dwight Wallis, Information and Records Manager for Multnomah County. Multnomah County has a new facility for its archives.



**“Organizing Electronic Records: Maintaining the Integrity and Usefulness of E-Records in a Networked Environment”** by Cathy Westfeldt, Senior Records Analyst, NARA.

Ideas and simple solutions for those of you who don't have a records or document management application but need help to organize your e-records at the department or organizational level. Cathy will address the challenges and benefits of managing your electronic workspace, developing a plan and structure that can be used organization-wide, and the importance of the control elements such plans provide. Using "real life" examples, this presentation will help you recognize if your shared networks are ready for a "stunning makeover."

**“Asset Management using RFID and Bar-coding”** by Will Daniel, Senior Solutions Consultant of BCS (and colleagues Lyndon Murray and Steve Gorham). The fundamentals of bar-coding and RFID as tools to manage assets and a case study highlighting record retrieval, tracking and trace, plus check-in and check-out functions.

**“Electronic Discovery: Trends and Changes”** by Mark Reber, Director of Marketing, FIOS, Inc. The program covered the basics of electronic discovery with a review of current case law, technology trends and the convergence of records management, compliance and discovery.

**“Tour of the Oregon Historical Society Archives”** by Mary Ann Campbell, Oregon Historical Society Librarian. The Oregon Historical Society has been in existence for over a hundred years. Beginning as the Oregon Pioneer Association, which was incepted by members of the wagon trains that made their way across the continent in the 19th Century, then re-envisioned in 1898 as the Oregon Historical Society, OHS continues its role as the protector of Oregon's and the Northwest's proud heritage. Besides artifacts, OHS boasts vast collections in archives, images, moving images, maps and more.

**“Could XML Technology Help Preserve Your Organization's Records?”** by Kyle Banerjee, Oregon State Library. Many technological innovations relating to records management have been made over the past decade, but few have generated as much excitement as XML. While many new technologies seem more promising before they are implemented than they are afterward (remember how Java was going to make platform-independent software available everywhere), XML is already transforming how information is managed and delivered.

**“Disaster Recovery: Lessons Learned from Hurricanes Andrew through Katrina”** by Thomas McGuire, Munters. Document Recovery during major disasters - Who -- What -- When and How. Who to call when disaster strikes; What to do before and after the disaster; When do you need to be prepared? How is the recovery process completed?; What methods/technologies are used; How to avoid the "disaster after the disaster."

**“Drowning in Paper? - The Makings of a Great Clean-Up Campaign”** by Cindy Fredrickson, Records Manager, Bureau of Land Management. Are you drowning in sea of paper and other stuff and can't find a way out? Have you thought of everything? Cindy discussed what to do before, during and after a clean-up effort.

**“Professional Ethics”** by Sue Lord, ARMA Region Manager. Ethics is an issue that needs to be brought up as a reminder in today's business practices, whether it is at your work, as an officer in ARMA or other organizations or committees you serve on. Doing the right thing is the best path to follow. Sue gave us an overview on “best practices” and remind us what “not to do”.

**Greater Seattle Chapter**

**“How to Become a Certified Records Manager (CRM)”** by Patty Holmquist, CRM, who works for King County. This program provided basic information on the work of applying for and



qualifying for the CRM exam. She described the subjects for each of the tests and suggested ways to prepare effectively for them.

**“ARMA, International and Beyond!”** by speakers: Sue Lord, Andrea Bettger, Bonnie Nadler, CRM, Joe Ramsdell, and Susan Priebe. We heard what people said they learned by attending the ARMA International conference. What were their key experiences in Chicago in 2005? Following the discussion, we were given a “live” demonstration of how one can access and use the ARMA, International Web site. Items highlighted included Information Specific Groups (ISGs), ARMA administrative and information resources, the Information Management Journal, and other services.

**“Identity Theft—It’s Not just Financial”** by Reginald Reid, Pre-Paid Legal Services. In this very practical program, our speaker explained different methods used in identity theft. His advice on how to protect yourself and your organization from the fastest growing crime in North America did not fall on deaf ears. This was clearly a topic of strong concern to those attending this program.

**“Rules & Tools for Public Records Management”** by Lisa Goldsworthy, Snohomish County Auditor. Records are the containers of the information that keeps government functioning. They are important to all residents, citizens and not. Records document the origin, evolution, and operation of its programs-revealing how government operates, how to responds to needs and how it serves its citizens. This presenter provided detailed ideas and developed materials (including models, forms, etc.) on creating, developing, and managing a Public Records Management Program.

**“Less Stress, More Success”** by Patricia Klingler, Certified Professional Coach. This program, a professional development topic, helped chapter members learn to manage personal stress better, to understand how stress manifests itself, to find better personal choices, and to take actions that can minimize the likelihood of stress among employees.

**“Retention, Destruction & Disposition Rules in Business Content”** by Brian Dirking, Stellent. A workshop discussion and look at new technologies that assist organizations create and maintain corporate retention and disposition policies for all types of information.

**“Mergers and Acquisitions: A Case Study: Cingular Wireless and AT&T Wireless”** by Nicole Smith, CRM, NBS Consulting. In this session, participants learned what they might experience during a major acquisition and merger process. The speaker had lived through the merger of Cingular and AT&T. She explained the pre-acquisition and post-acquisition processes with many illustrations of the need to locate and share data throughout the process.

**“The Latest Scary Records Management Issues”** by Joan Feldman of Navigant Consulting. Also, Fran Blaylock, Region Coordinator, in her official chapter visit, stressed the importance of ARMA of professional development, retention and destruction management technology, business acquisitions and mergers, and described the ARMA Competencies project.

### **Puget Sound Chapter**

**“Electronic Document Management: A Case Study and Legal Considerations”** by Neal H. Luna, Attorney at Law, from Vandenberg Johnson & Gandara. Mr. Luna discussed what the potential litigation risks are for public records disclosure and public e-commerce issues via the World Wide Web.



**“Rocket Science for Records Managers: Determining Retention Periods”** by Jennifer Winkler, Records Manager for the City of Seattle. Jennifer’s presentation took a more advanced look at the analysis involved in determining retention periods including where to look for requirements and how to identify the value of a record. She also covered the approval process and tips and techniques she has used at the City for implementing the schedules.

**“RM and its Role Responding to Public Records, Discovery & Subpoenas”** by Barbara Benson, Director of Records Management Services and Eliza Saunders, Director of Public Records and Open Public Meetings at the University of Washington. The speakers discussed the important role records management plays in establishing the policy and procedures for the collection, review and release of records, including electronic, to insure compliance with requests for information from the public.

**“Use of Technology in an Effective RIM Program”** by Gregory Trosset, King County Records Management. Greg offered that the rapid pace of technology changes presents both challenges, and solutions to those challenges with respect to effective records management. His program explored 5 challenges in records management that advances in technology has brought about, and offer possible solutions that the very same technology offers to address these challenges.

**“Forms Management – Developing and Growing a Forms Program”** by Tom Shull, Weyerhaeuser Company Forms and Records Manager. Tom’s program covered topics such as the basic components of a program, getting support for your efforts, using standards to promote efficient forms, managing paper and electronic forms, metrics and other important consideration and where or not there is a connection between forms and records.

**“State Archives Essential Records Program”** by Michael Saunders, Puget Sound Regional Archivist for the Washington State Archives. Michael has over 26 years experience in public archives and records management in Washington State. Michael provided the attendees with most up-to-date information on how we can preserve our records to identify and protect essential records, conduct a records risk analysis and plan for records disaster response and recovery.

**“Washington State’s Public Records Act”** by Greg Overstreet, the Special Assistant Attorney General for Government Accountability for the State of Washington. Greg serves as an “ombudsman” to the public to resolve open-government issues with state agencies and, when appropriate, local governments. His presentation reviewed the 2005 amendments to the Public Records Act and an analysis of the Attorney General’s 2006 Model Rules for Public Records. Greg’s presentation included the responsibilities of not only those responding to requests for public information, but also the responsibilities of the person requesting the information.

**“The Challenge of Organizing Digital Photographs”** by Joy Sage, Tacoma Public Utilities Records Manager for the Generation Section of Tacoma Power. Joy’s program provided an overview of the Photographic Documentation Management Team’s work to sell the concept of document/photo management, research of available software and plans to tour other agencies to find out how others have approached this challenge.

**“Records Management is Our Future: Cooperation and Understanding From Both Sides of the Fence!”** by Tara Ramos, Grays Harbor Public Utilities. Bridging the gap between Records and Information Technology continues to be a crucial part of the Grays Harbor Public Utility District’s thriving success. By maintaining a close working relationship and keeping the lines of communication open, we have the opportunity to learn from each other. Tara discussed the steps that the Grays Harbor PUD has taken to arrive on the path they currently follow.