

2006-2007 Great Northwest Region of ARMA's Chapter Programs

Bellevue/Eastside Chapter

“Disaster Recovery”; Bob Farace of Munters Moisture Control. This program was the only program of the year that did not fit our theme, but did fit into the fact that September is National Preparedness Month. Bob and others from Munters discussed the effects of Hurricane Katrina on the Gulf area and how their company was involved. They also discussed their Code Blue program and how it benefits organizations to be prepared.

“Retention Schedules – The First Step in Compliance”; A panel consisting of Kyle Stannert, City of Bellevue, Tim Westhoff, ShareBuilder and Joe Ramsdell, Paccar, discussed the approaches their companies are taking towards retention schedules.

“Discussion of ARMA International 2006 Conference”; Panel members discussed the programs that they attended at the 2006 ARMA International Conference and specifically those that related to compliance and how to better your records management program for compliance related issues.

“Putting Forth a Professional Face”; Michael Buschmohle. Having policies, retention schedules and other tools necessary to ensure compliance is just one component of RIM. The other is getting that information across to the people in your agency in a manner that is both professional and authoritative. If you cannot present your program in an effective manner – you will not have compliance. Mr. Buschmohle presented the first of our “professional development” series. Presenting a professional and polished self instills confidence in those you work with and that is half the battle in ensuring compliance.

“Ensuring Electronic Data for Compliance”; Tom Hartley, Snohomish County Dept. of Information Services. Security for paper is easy, lock the file cabinet, lock the file room door, restrict access, etc. The protocols are there and easy to detect when someone isn't following them. The same cannot be said for records and information in electronic format. Our speaker gave tips and techniques on ensuring file security. Topics covered included: basic principles of risk management we can all use to help with file security, the electronic tools that help us secure electronic documents using the principles described in the first part of the presentation and a quick “how-to” session on setting file security and auditing file access.

“Writing Policies for Clarity and Compliance”; Cherie Tucker, Grammarworks and Darlene Curtice. This was the second of our professional series. Cherie Tucker conducted a workshop in the afternoon that covered the top ten writing mistakes, how to avoid them and how to correct them. Clearly written policies are key to compliance. The second part, in the evening, featured Darlene Curtice discussing policies that she has written and how they are vital to a successful RIM program.

“The Green River Killings Case Study: Recordkeeping Challenges and Solutions”; David Ryan, King County Prosecuting Attorney Office. The “Green River Killer” serial murder investigation generated hundreds of thousands of pages of paper documents, photographs, artifacts, motel receipts, etc. from 1982-2001. An updated DNA testing method led to the 2001 arrest of Gary Ridgeway for four of the murders. This required investigators and prosecutors to immediately respond to the following two challenges: (1) Defense Counsel needed to receive all of the investigation records very quickly; and (2) the rapidly growing number of individuals involved in the case all needed to have continuous and simultaneous access to all of the materials. Senior Deputy Prosecuting Attorney David Ryan, described the records management implications while explaining the history and conclusion of the Green River case. This presentation illustrated the importance of compliance with recordkeeping requirements in order to maintain the records until the case was closed.

“The New Rules for E-discovery”; This session was to feature an attorney discussing the new Federal E-discovery rules and their effect on records management. Unfortunately, the speaker did not arrive for the meeting, so the chapter members present discussed the new rules and the effect they may have on records management. A discussion was also held on how chapter members’ organizations handle discovery records and litigation holds on electronic records.

“Go Forth and Destroy”; Barb Benson, University of Washington and Jeff Benson, National Archives and Records Administration. Now that you are in compliance, have clear retention schedules, well placed policies, no legal holds and have gotten your message across effectively, you may destroy. Our speakers discussed the final step in compliance, disposal of records, the importance of documenting disposal and how each of their respective organizations deals with disposition.

“Marketing your RIM Program”; Susan McKinney. Susan discussed how to market your RIM program and the importance of marketing to the right crowd. It tied up our compliance theme nicely because if people don’t use your services, you can’t ensure compliance. We also celebrated our 15th anniversary as a chapter and installed the new board members.

Boise Valley Chapter

“Historical Records and Record Preservation”; Steve Barrett, Idaho State Historical Society.

“Records Management – Oh! There’s so much more!”; Sue Lord, Great Northwest Region of ARMA Region Manager.

“Personal Development: DiSC Profile, Part I”; Diana Papilli, of Results from the Inside Out. Attendees learned about the four types of personalities and how to identify and better work with those personalities in both professional and personal environments.

“Myths and Realities of Managing Electronic Records”; Susan McKinney, ARMA International President.

“Personal Development: DiSC Profile Part II”; Diana Papilli, of Results from the Inside Out.

“Computer Forensics and E-discovery”; Allison Goodman of E-discovery, Inc.

“Annual Election Night and Region Activity Update”; Fran Blaylock, Great Northwest Region of ARMA Coordinator.

“Vinegar Syndrome” and Appreciation Night; John Britton, Kodak and Local Vendors. The program discussed the proper care/storage/ preservation of microfilm and microfiche. Each of the vendors who supported the chapter throughout the year were given an opportunity to speak about their services and/or products. This meeting gave the Chapter an opportunity to thank the vendors for their support. The Chapter president also presented Certificates of Appreciation to the Officers, Board Members, and Committee Chairs for their work and dedication over the past year. The Chapter Member of the Year winner was announced

Columbia Basin

“Records 101: Tips on Cleaning up the Mess you Inherited”; Bob Dalton, Dalton Consulting, Tacoma, WA.,. Bob provided tips and techniques he has used in the process of evaluating records being stored in-house or in commercial records centers that lack descriptions in order to determine their value to the organization.

“How to have a Successful Office Cleanup”; Cindy Frederickson, Bureau of Land Management, Portland, OR., Cindy shared with us a variety of techniques used in both smaller office environments as well as in large offices to accomplish this while carrying on a more-or-less regular work schedule.

“Nightmare on Grant Avenue: Lessons Learned from a Records Disaster”; Linda Montgomery, Washington Closure Hanford, Richland, WA, Linda, a long-time member of the Columbia Basin chapter, explained how she and her team successfully responded to “a records manager’s worst nightmare”: a burst sprinkler system pipe and ensuing flood inside a records storage area.

“Disaster Recovery: Lessons from Katrina”; Gail Ann McCreary, Mississippi Power Company, Gulfport, MS, Gail Ann made a very big hit with our membership with her fact-based and sometime amusing presentation about the worst natural disaster to hit our nation in recent history.

“Practical Advice from the Front Lines of Public Disclosure”; Barb Werelius, Tacoma Public Utilities. Barb passed along experience and tips from many years of working public disclosure issues at her PUD.

Greater Anchorage Chapter

“Appraising Records for Retention”; Toby Allen, Records Manager, Municipality of Anchorage

“Fire Suppression Systems”; Lana Taylor, Records and Information Manager, Chugachmiut

“Local Government Records: Just the Basics”; A Video Workshop Production by the Local Government Records Program and the Ohio Historical Society. RIM basics: Records Inventory, Retention Periods, Storage Media Decisions, and Disaster Preparedness.

“Certified Records Manager: Achieving Certification through the Institute of Certified Records Managers”; Jeffrey Schowen, CRM

“Networking Meeting!” We provided different subject tables, and gave plenty of time to sit and talk with other members about issues of similar interest. Our subject tables were: Compliance, e-records, scanning, retention, records storage, and volunteering.

“SharePoint in Your Workplace”; Marc Lawes, RIM Information Management Lead, Nana-Colt Engineering, LLC. Records management implications of using SharePoint.

“Electronic Records Management and the Law: Understanding What is Expected by Regulators and Judges”; Mr. Robert Williams, President of Cohasset Associates and founder of the MER (Managing Electronic Records) Conference. The presentation focused on the issues associated with the admissibility of electronic records in legal and regulatory proceedings.

“Will Your Records Be There When You Need Them: Digital Records and Media Stability”; Alan A. Andolsen, CRM, President of Naremco Services, Inc. This ARMA webinar introduced key concepts of effective media stability and related them to existing media options. Topics included: basic components of digital media stability, pros and cons of current media formats, developments in digital storage media, practical & technical implementation issues

Greater Seattle Chapter

“The Green River Killer—Recordkeeping Challenges and Solutions”, Dave Ryan, King County Prosecutor.

“Archivists and Records Managers Working Together”; panel speakers: Barbara Benson, UW; John Bolcer, UW; Scott Cline, City of Seattle; and Sara Nau, Archdiocese of Seattle.

“The Digital Management Program at the Seattle Municipal Archives: Collection and Administration of City-Wide Digital Photography”; Julie Viggiano, City of Seattle

“Impact of the New 2006 Federal Rules of Civil Procedure on Electronic Records”; Art Skaran, Whitmont Legal Technologies, Inc.

“Imaging Essentials: Recipe for Success”; Greg Mennegar, at that time with the Washington State Archives

“E-mail and E-discovery: Managing Electronic Information”; Charlene Brownlee, Davis Wright Tremaine LLP.

“The Federal Electronic Records Project”; Bill Greathouse, NARA.

“Fundamentals of Records Retention Inventory”; Patricia Holmquist, CRM, King County.

“Advanced Electronic Records Retention Inventory”; Nicole B. Smith, CRM, NBS Consulting.

“RFID Technology in The Seattle City Library”; Marilyn Sheck, Seattle Public Library.

“Biotech a Maze of Regulations: Documenting Clinical Trials”; Fran Blaylock of ICOS. Also Chapter Auction and Awards night.

Oregon Chapter

“If You Build It, They Will Come - Successful Strategies for Establishing Great Customer Service in Records Management”; Dee Wise, Oregon Chapter board member and the Records Manager of the Law Firm Dunn Carney Allen Higgins & Tongue LLP

“Shanghai Tunnels Tour - History of the Portland Underground”; Michael Jones, President of the Cascade Geographic Society.

“What's Happening at ARMA?”; David McDermott, a past-president of ARMA, International discussed some of the great initiatives ARMA is undertaking, such as Competencies Definitions, Standards Development, and Leadership Training.

“Beyond Estate Planning Documents: Four Requirements for a Successful Estate Plan”; Marsha Murray-Lusby, attorney with Dunn Carney Allen Higgins & Tongue LLP. This presentation reviewed those four characteristics, and provided practical tips for including them in one's estate plan.

“New Rules Regarding E-Discovery”; Mark Reber of Fios, Inc. The Federal Rules of Civil Procedure (FRCP) were amended and affected the discovery process. What are the new rules? Do they really add "reasonableness" to the process? What are the implications of the new rules for attorneys, manufacturers of cataloguing software, and, most importantly, for records managers?

“City of Portland Archives Tour and E Files Presentation”; Portland City Archivist, Diana Banning. Our tour of the City of Portland's Stanley Parr Archives & Records Center (SPARC) will be hosted by the city archivist, followed by a brief presentation on E-Files Management. The City of Portland's archival records provide important historical evidence of the development of our city government since 1851. Significant research subjects documented by the collection include, but are not limited to, urban planning, parks, land use, public works, economic development, public

safety and social issues. Following the tour there will be a short demonstration of the City's electronic records management software system. Included will be a preview of the module that allows public online viewing of thousands of city ordinances, resolutions and photographs – as well as access to catalog information on the entire archival collection

“Information Security: Recovery and Prevention”, a half-day seminar.

Part 1 - “Disaster Recovery” presented by Gail Ann McCreary, CRM, Records Manager for Mississippi Power Company. A case study in disaster response and records recovery in the aftermath of Hurricane Katrina.

Part 2- “Document Imaging” presented by Greg Mennegar of Spectrum Information Services. Document imaging as part of an organization's disaster preparedness strategy.

“RIM's Role in Environmental Stewardship”; presented by Tom Pollock of Metafore.

“Installation of Officers and a Presentation on Professional Ethics for Records Managers and Archivists”; Oregon Chapter Board members Tim Hunt, CRM, Records Analyst for the City of Portland and Matt Oftedahl, Archivist for the Port of Vancouver.

Puget Sound Chapter

“Developing an Email RFP for Software”; Andy Hill, Washington State Director of Information Services for the Office of the Attorney General's Office. Mr. Hill discussed how the Attorney General's Office went about developing the Request for Proposal to acquire their near line archiving product for e-mail.

“Developing a Sarbanes-Oxley Compliant Retention Program”; Denise Simons, Haystack Associates. Developing a SOX compliant retention program given recent events including corporate misbehavior and the passage of the Sarbanes-Oxley Act of 2002, developing or reviewing and updating your corporate document retention policy and schedule as become a priority for most companies.

“Disaster Recovery of Electronic Records from the IT Perspective”; Ged West, Information Technology Supervisor, Grays Harbor PUD. Ever wonder if your IT staff really understands the importance of your electronic records, and whether or not you would still have access to them during or after a disaster? When talking about disaster recovery, have you ever wondered what all those acronyms thrown around by IT (DR, CDP, RAID, AWA, BIA, etc.) actually stand for? This program is aimed at giving insight into how IT sees records, and give you some inside info on “How to talk to a geek” in order to avoid costly miscommunications by asking the right questions. See a real world example of what Grays Harbor PUD has done to protect their records, to insure recoverability and access in the event of a disaster.

“Course 101 – Tips on Cleaning up the Mess (You inherited the problem ...Right?)”; Robert W. Dalton, CRM, Dalton Consulting. Bob provided tips and techniques that he has used in the process in the evaluation of records being stored in in-house or commercial records centers that have limited or no records description and determine their records management value to the organization. On the lighter side, he will use photographs taken over the years reflecting the type of records he works with in determining ownership, retention, archival value and destruction requirements. He will show how to create a simple inventory and database using either Microsoft Access or Excel to enhance the review process and manage the boxes in the future.

“Stressed is Not a Way of Life”; Patricia Klingler, ACC, Certified Professional Coach, of Xplore Your Zing. Who among us has not experienced a sense of frenzy or anxiety or pressure and accepted it simply as the way things are? Stress has become a normal mode for how we exist in the world today, with unfavorable impacts on the economy, our relationships, and the future. 50%

of adult Americans suffer adverse health effects from stress. Consider also the prevalence of stress in the workplace and the expense to American businesses.

“Recent Court Rule Changes Discovery of Electronic Records, Court Decisions, and Emerging Legal Trends”; Mark Dietzler, Attorney at Law, Vandenberg Johnson & Gandara, LLP. Mr. Dietzler covered practical real life scenarios and solutions. Discussion of emerging legal and technological approaches, provided some easy first steps to implement a records management program, and provided practical advice and insight in dealing with e-discovery issues.

“An Overview of E-Discovery, Its Impact Upon Records Management, and Emerging Technical Trends”; Joan Feldman, Managing Director from Navigant Consulting Inc. Ms. Feldman equipped the chapter to better prepare for and deal with disclosure and discovery in light of the amended court rules.

“Effective Electronic Records Management”; Susan McKinney, CRM, Director, Records & Information Management, University of Minnesota and President of ARMA International. Ms. McKinney's presentation addressed the ever-increasingly important, topic of effective electronic records management. "For many years, Records Managers have discussed the need to improve how their organizations manage electronic records. The program was focused on turning the theory of how to manage electronic records, including electronic mail, into practical solutions that can be implemented with limited labor and resources."

“Public Disclosure Model Rule in Washington State”; Greg Overstreet, Special Assistant Attorney General for Government Accountability, Washington State Attorney General's Office

“E-Discovery: Take a Byte Out of the New E-Discovery Rules Bit by Bit”; Mark Dietzler, Attorney at Law, Vandenberg Johnson & Gandara. This presentation provided an overview of the e-discovery process, new federal rules, legal and records management issues.

“Imaging Essentials – A Recipe for Success!”; Greg Mennegar, Spectrum Information Services. This workshop was designed to help anyone make informed decisions that will help ensure the success of any imaging project. Strategies for electronic records management and integration with other electronic records were discussed.

“How to Become A CRM”; Ember D. Krumwied, CRM, Investco Financial Corporation. Ember discussed the benefits for achieving the certification including personal growth, enhanced professionalism, increased job responsibilities, and an opportunity for higher salary benefits. She explained the requirements for both education and experience that qualifies an individual to be able to apply for the program. Ember outlined the current requirements of the testing phase – which is that one must pass all six parts of the program within five years.

“Disaster Recovery: Lessons from Katrina”; Gail Ann McCreary, CRM, Records Manager for Mississippi Power Company. The case study will describe the experiences of a public utility RM staff in the aftermath of the worst natural disaster in US history. In addition to handling various degrees of damage to records at multiple sites, three corporate office buildings had to be completely vacated of undamaged records, personal effects, and office furniture, each with its own unique challenges. Emphasis was placed on disaster response and records recovery efforts as well as preparation, management of the overall disaster recovery effort, customer service issues and business impact. The presentation concluded with lessons learned from the disaster and recovery process with opportunity for questions.