



ARMA InNOVATIONS

President's Message, February 2010

Join Us For Our February 25, 2010 Winter Seminar

Speaker:
Alan Hilburg,
Marketing and Branding
Consultant

**"Secrets of Moving from the
Basement to the Boardroom"**

General Dynamics Execu-
tive Conference Center
1000 Wilson Blvd; Suite
810, Arlington, VA 22209

Register online at

<http://www.armamar.org/nova/programs/seminar2010.htm>

By Feb 23, 2010

See page 3 for details.

8:30 am Registration &
Continental Breakfast
9:00 am Workshop
11:45 am Lunch Provided
1:00 pm Workshop
4:30 pm Workshop Ends
Cost: \$100 for everyone
Metro and garage parking
nearby



February is a busy month – our annual Education Seminar featuring Alan Hilburg is scheduled for February 25, also in Rosslyn at the GDIT Executive Conference Center. Also in conjunction with NCC-AIIM we are conducting a sold out one-day pre-conference training class, on Feb 24, on Electronic Records Management. This class will be held the day before our February educational seminar and provides attendees the full curriculum for earning the *ERM Practitioner* credential from AIIM International. This class normally takes two days but it has been condensed for our group into one action packed day. Class attendees also will be able to access the online course for up to 6 months following the class, and will take the test online.

March features Martin J. Littlefield, E-Discovery Coordinator, USDOJ/EOUSA,

Office of Legal Programs. His program is on E-Discovery.

April - NOVA ARMA is planning a regional event with our regional ARMA chapters and NCC-AIIM; a "shredding day" scheduled for Earth Day weekend, April 24, 2010. This event will feature a number of shredding locations so that individuals or organizations can have their documents shredded for free. We hope to attract local businesses and news organizations to participate in this community service event.

April also features, on April 21 at the Marco Polo, Joe Lambert, D/IMS, CIA, "Moving from the Basement to the Boardroom."

May features Steven Levenson, special assistant and chief technology officer, U.S. District Courts. His talk, at the Marco Polo, will focus on his role for the US District Courts, as well as industry standards that apply to the Records and Information Management industry. Mr. Levenson is chair of the AIIM Standards Committee and sits on the AIIM Board of Directors. He was instrumental in the development of the new standard, PDF/A.

June features and end of year June Social. The So-

cial will be held at Wolf Trap and will feature a pot luck picnic and a performance by RAIN, the world's leading Beatles tribute band. Scheduled for Saturday, June 26, the picnic will begin at 5pm and the show at 8pm. This is an amazing show and is not to be missed. The chapter has purchased a block of 30 inside seats, which will go fast.

We have an exciting set of programs scheduled for this chapter season. Please spread the word among your colleagues and we hope to see you at the February 25th Seminar.

Lastly, we are soliciting volunteers to join our board. Please let us know if you are interested.

Mark Mandel, President
NOVA ARMA
Public Records Administrator,
DC Executive Office of
the Mayor
Madelm2001@netzero.com

ARMA NOVA CHAPTER

NEWSLETTER

ARMA InNOVations is published monthly from September through June by the Northern Virginia Chapter of ARMA International to inform chapter members of ARMA NOVA activities and to circulate news and opinions of the members.

SUBMISSIONS

We welcome articles, news stories, reports, and opinions. Please send submissions or Letters to the Editor to:

George D. Darnell, CRM
Acting Editor, **ARMA InNOVations**
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Advertise Your Business in ARMA InNOVations

| Standard Unit Size | Width | Height | Cost |
|----------------------|-------|--------|---------|
| Full Page | 7.5" | 10" | \$80.00 |
| Half-Page Vertical | 3.5" | 10" | \$60.00 |
| Half-Page Horizontal | 7.5" | 4.75" | \$60.00 |
| Quarter Page | 3.5" | 4.75" | \$50.00 |
| Business Card | 3.5" | 2.0" | \$30.00 |

Advertisers must supply copy-ready art. There will be an additional charge for ads needing design. Costs listed are per issue. The newsletter is published 10 times during the chapter year, January - December. An advertisement placed for ten issues receives a 20% discount and new art work may be submitted for placement in any issue. Advertisers will receive one copy of each newsletter containing their advertisement.

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The Information Management Professionals



Date: February 25, 2010 ♦ Time: 8:30 a.m. - 4:30 p.m. ♦ Location: Arlington, Virginia

SEMINAR ANNOUNCEMENT

“Secrets of Moving from the Basement to the Boardroom”

Sponsor: The Northern Virginia Chapter of ARMA International presents our 2010 Seminar on moving Records Management and Records Managers from the basement to the boardroom.

Why attend? There is an elephant in the Boardroom called Records and Information Management (RIM). If you are tired of cleaning up after it and would rather be riding it, this seminar is for you. In one dynamic day, you will build a strategy and plan to elevate your organization's appreciation for RIM (macro) and your role and contribution (micro) as a valued management, leadership, and strategic asset.

You will leave with:

- A brand makeover strategy
- Organizational education strategy
- A toolkit of new communication tools
- Fluency in a new language
- A clear choreography for reversing the most inaccurate perceptions your colleagues have about records and information management
- A plan for building organizational appreciation for three key roles ('hats') that RIM executives must play in the next six months

Workshop Speaker/Facilitator: Alan Hilburg, an award-winning author (two NY Times best-sellers on Leadership), filmmaker, executive coach, branding authority ("Where's the Beef?", "Bringing Good Things to Life" and more); and global marketing communications authority, researched what top executives think of you and your RIM program (wouldn't you like to know?). Alan created a workshop exclusively for ARMA professionals to address the many career and organizational obstacles (self-created and organization-created) that have kept RIM professionals from being invited to contribute because they weren't invited to the 'meeting.'

His entertaining (as Alan describes it, "fun with a purpose") style combined with his use of innovative technology promises to be one of ARMA's most worthwhile professional development workshops ever. Alan promises that not only will you leave the workshop with an unprecedented sense of motivation, but pragmatically with a personal action plan (PAP) individually designed for you, your organization, and your career.

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Date: February 25, 2010 ♦ Time: 8:30 a.m. - 4:30 p.m. ♦ Location: Arlington, Virginia



The Information Management Professionals



Date: February 25, 2010 ♦ Time: 8:30 a.m. - 4:30 p.m. ♦ Location: Arlington, Virginia

Logistics:

Location: The General Dynamics Executive Conference Center
1000 Wilson Blvd; Suite 810 on UM (Upper Mezzanine)
Arlington, Virginia 22209

Parking: Available in the building on Wilson Blvd or public parking on street.

Metro: Rosslyn Station - Two Blocks Away

Cost: \$100.00 (A bargain worth paying out of your own pocket if you have to.)

Registration: www.armamar.org/nova/programs/seminar2010.htm

Questions: Contact Angela Tayfun at atayfun@ppc.com or (703) 748-7119

Continuing Education Credits for CRMs: Pre-approved for 5.5 credits. Approval code 20100108185844.

Seminar Schedule:

| | |
|---------------|---|
| 8:30 - 9:00 | Registration and Continental Breakfast |
| 9:00 - 10:45 | Workshop |
| 10:30 - 10:45 | Break (Refreshments Included with Registration) |
| 10:45 - 11:45 | Workshop |
| 11:45 - 1:00 | Lunch (Included with Registration) |
| 1:00 - 2:00 | Workshop |
| 2:00 - 2:15 | Break (Refreshments Included with Registration) |
| 2:15 - 4:00 | Workshop |
| 4:00 - 4:15 | Seminar Wrap Up |

NOTE: NOVA/ARMA and NCC AIIM are co-sponsoring the AIIM Electronic Records Management (ERM) Certificate Program Practitioner Class that will be held at the same location on February 24, 2010. That event is sold out.

[Continued on Page 5](#)

Date: February 25, 2010 ♦ Time: 8:30 a.m. - 4:30 p.m. ♦ Location: Arlington, Virginia

About our sponsors

ARMA NOVA is seeking sponsors for the seminar at the following levels:

Sponsorship Levels:

- **Platinum - \$1500**

Includes seminar table space for promotional brochures, two attendees, 5-minute self introduction during lunch, all seminar advertising (web site logo/link on the seminar page as well as the home page), email mention, sponsor provided poster at the seminar site, company logo in seminar program, logo and link on chapter website and full-page ad in chapter newsletter and free registration for two attendee at ARMA NOVA programs for one year.



- **Gold - \$1000**

Includes seminar table space for promotional brochures, one attendee, 5-minute self introduction during lunch, all seminar advertising (web site logo/link on the seminar page as well as the home page), email mention, sponsor provided poster at the seminar site, company logo in seminar program, logo and link on chapter website and full-page ad in chapter newsletter and free registration for one attendee at ARMA NOVA programs for one year.

- **Silver - \$500**

Includes seminar table space for promotional brochures, one attendee, 5-minute self introduction during lunch, all seminar advertising (web site logo/link on the seminar page as well as the home page), email mention, sponsor provided poster at the seminar site, company logo in seminar program, logo and link on chapter website and half-page ad in chapter newsletter for one year.

- **Bronze - \$250**

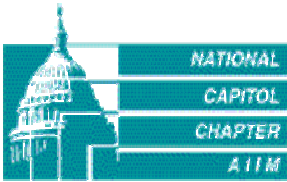
Includes one seminar attendee, 5-minute self introduction during lunch, all seminar advertising (web site logo/link on the seminar page as well as the home page), email mention, company logo in seminar program, logo and link on chapter website for one year.

Sponsorship selection and payments should be sent to the Chapter Treasurer, Crystel Kurtzberg at: crystelk@aol.com, or you can pay with a credit card by clicking the [Click and Pledge logo below](#).



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AIIM Electronic Records Management (ERM) Certificate Program **AIIM ERM Practitioner Class**

NCC-AIIM and Northern Virginia ARMA Chapter: February 24, 2010

About this Event: Joint Training with NCC AIIM and Northern VA ARMA Chapter

The Electronic Records Management (ERM) Certificate Program is designed from global best practices among AIIM's 65,000 members. It explores records management in relation to the business needs of all types of organizations, whether in the public or private sector, embracing all records, but with a particular emphasis on electronic records.

AIIM provides education, research, and best practices to help organizations find, control, and optimize their information. For over 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records, and business processes. AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire Enterprise Content Management industry - including users, suppliers, and the channel - acts as the industry's intermediary.

Course Description

The ERM Practitioner records and related schemes, metadata, posal. This course, changes in the vendor landscape; increased focus on email capture and retention; expanded focus on new content types such as wikis and blogs; and new best practices and standards. The course also provides additional focus on taxonomies; migration technologies for moving away from shared drives; auto-categorization to develop and maintain taxonomies, and auto-classification to extract metadata

Sold Out

program covers the lifecycle of concepts such as classification security, retention, and dis- which was revised in early 2009, also includes

Who should attend AIIM's ERM Practitioner training course?

The ERM Practitioner Class is designed for Business Managers, IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, and Records Management Professionals, as well as for Solution Integrators and Providers, Sales Consultants, Project Managers, and Technical staff.

Continued on Page 7

About Our Trainer:

Carl Weise, Industry Advisor – AIIM International

Carl has over twenty five years of senior level records management and project management experience in the financial, IT, manufacturing, electric power, legal and government environments in both Canada and the United States. He is also a regulatory compliance and risk management expert. He has worked for records management software providers and, more recently, worked as a Principal Consultant in Enterprise Content Management (ECM).

Carl has the following designations from AIIM: ERM Master, ECM Master, EMM Master, BPM Specialist and IOA Specialist. He is also a Certified Records Manager (CRM), from the Institute of Certified Records Managers, and has given presentations at AIIM and ARMA chapter meetings and ARMA annual conferences. Carl developed and taught college level records management courses and has given many seminars on records management, electronic records management, e-discovery, compliance, risk management and enterprise content management in cities across the United States and Canada. He has written articles on records management which has been published. His article on Records Management and ISO 9000 was translated and published in Japan. He has contributed over 15 years of volunteer effort holding the following positions: Vice-President, Examination Administration, Institute of Certified Records Managers (ICRM), ARMA Conference Program Committee Member, ARMA Conference Program Manager, and Chapter President of Pittsburgh ARMA Chapter.

Logistics: 8:30 am – 9:00 am Registration

| Time | Session | Purpose |
|---------|---|---|
| 9:00 AM | Introductions, Welcome, Workshop Outline and Objectives | To provide a framework for the workshop |
| 9:15 | Introduction/Create & capture records | To introduce ERM basics, types of records and approaches for capturing them as records |
| 10:30 | Break | |
| 10:45 | Metadata/Introduction to classification | To describe metadata and classification concepts, schemes, and categories |
| 11:30 | Developing classification tools/Classifying records | To understand the steps required to conduct an inventory, develop a classification scheme and approaches and tools for classifying messages |
| 12:00 | Lunch | |

[Continued on Page 8](#)

| | | |
|---------|--|---|
| 1:00 PM | Search, retrieval and presentation/ Controls and security | To describe different approaches for searching and retrieving records and access controls and tools for securing and auditing records |
| 1:45 | Retention and disposition/ RM technologies | To describe the significance of retention, options available for disposition and technology options for the RM systems |
| 2:30 | Break | |
| 2:45 | Retention and disposition/ RM technologies (Cont'd) | |
| 3:30 | Electronic records storage/Digital preservation | To identify storage options, digital preservation risk factors and strategies for ensuring long term access to electronic records |
| 4:45 | Conclusion and evaluations | To outline next steps, including taking the exam. To have students complete the course evaluations. |
| 5:00 | End of Day | |

Place: The General Dynamics Executive Conference Center
 1000 Wilson Blvd; Suite 810
 Arlington, Virginia 22209
 UM (Upper Mezzanine)

Parking: Available at the building on Wilson Blvd and on street or nearby.

Metro: Rosslyn Station: Two blocks from the Building (1000 Wilson Blvd.)

Cost: Rate \$595.00

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RECORDS MANAGEMENT AND THE FEDERAL GOVERNMENT

By Michael J. Faber, CRM

Franklin Delano Roosevelt, who signed legislation creating the National Archives in 1934, was the first U.S. President to take an active interest in U.S. Government records. He had his own long-term plans for the gigantic Pentagon, which was built at breakneck speed at the outset of World War II and is still the world's largest office building in terms of square footage (over 6.5 million s/f). "FDR hated the Pentagon architecturally, but recognized the need for it. His plan for it after World War II was to use it for records." (David Brinkley, 1991). Little did Roosevelt know that the Pentagon would have no where near the space for government records.

The Records Disposition Act of 1943 was revised by the National Archives and amended in 1945 to include the government-wide General Schedule (GS), which authorized the systematic disposal of government records. Prior to this time, the U.S. Government showed little interest in document disposition/destruction. In the private sector, if a business felt they no longer needed a series of records, they would simply be disposed of as trash.

Since the 1930s and 1940s, the U.S. Government has become increasingly involved in the retention and destruction of both government held and private sector records. A brief overview of some of the major Federal initiatives and legislation affecting document retention and disposal would include:

1934 FDR creates the National Archives... Social Security Act of 1934

Penalties and fines are imposed for disclosing information obtained through Social Security numbers and files.

1943 – Records Disposal Act – (amended in 1945) includes the General Schedule for the disposal of Federal records.

1948 – The Hoover Commission – extended the Federal government efforts to control records and information.

1950 – Federal Records Act – Established the framework for records management programs in the Federal Agencies.

1966 – The Freedom of Information Act – signed by President Lyndon Johnson. Requires Federal agencies to release unclassified information to the public.

1974 – Privacy Act of 1974 – "each U.S. government agency will have in place an administrative and physical security system to prevent the unauthorized release of personal records."

1978 – The Right to Privacy Act – Requirements and penalties are aimed at the private sector, mainly the financial industry.

1996 – Health Information Portability and Accountability Act (HIPAA) – Monitors health information and enforces criminal penalties for violations.

1996 – Economic Espionage Act – U.S. Attorney General can assist businesses in recovering from losses involving industrial espionage.

1999 – Graham-Leach-Bliley Act – Covers financial and privacy issues. Monitored and enforced by the Federal Trade Commission.

2002 – Sarbanes-Oxley Act (SOX) – Requires proper accounting and disposal policies and includes criminal penalties up to the CEO level.

2003 – Fair and Accurate Credit Transactions Act (FACTA) – Provisions for protection from Identity Theft and the "Disposal Rule." Deals with prevention of unauthorized access of private information.

Looking at just this brief chronology of initiatives and legislation, it is obvious that the Federal government will continue to exert authority in issues of privacy, health, financial and other information management issues. There are literally thousands of Federal laws and regulations which determine how information should be managed. In addition, many local and state guidelines exist which can impose civil and criminal penalties for improper disclosure of protected information.

In today's climate of litigation and regulations, it is essential that private businesses and government agencies follow the applicable laws and guidelines. At the same time it is necessary for records managers in the government and private sectors to implement policies and procedures which will both protect information which is needed and to properly dispose of or destroy records which are no longer needed.

Membership Director's Report

The current ARMA NOVA Membership is 85, with two new members joining us in January.

We are pleased to welcome you into our chapter and hope to see you at our upcoming events.

New Members

Mr. Daniel Richard Mastervich
Supervisor - Records
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6801 Industrial Rd
Springfield, VA 22151
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(703)750-4335

Billie J Wright
Records Management Officer
Missile Defense Agency
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(301)868-8294

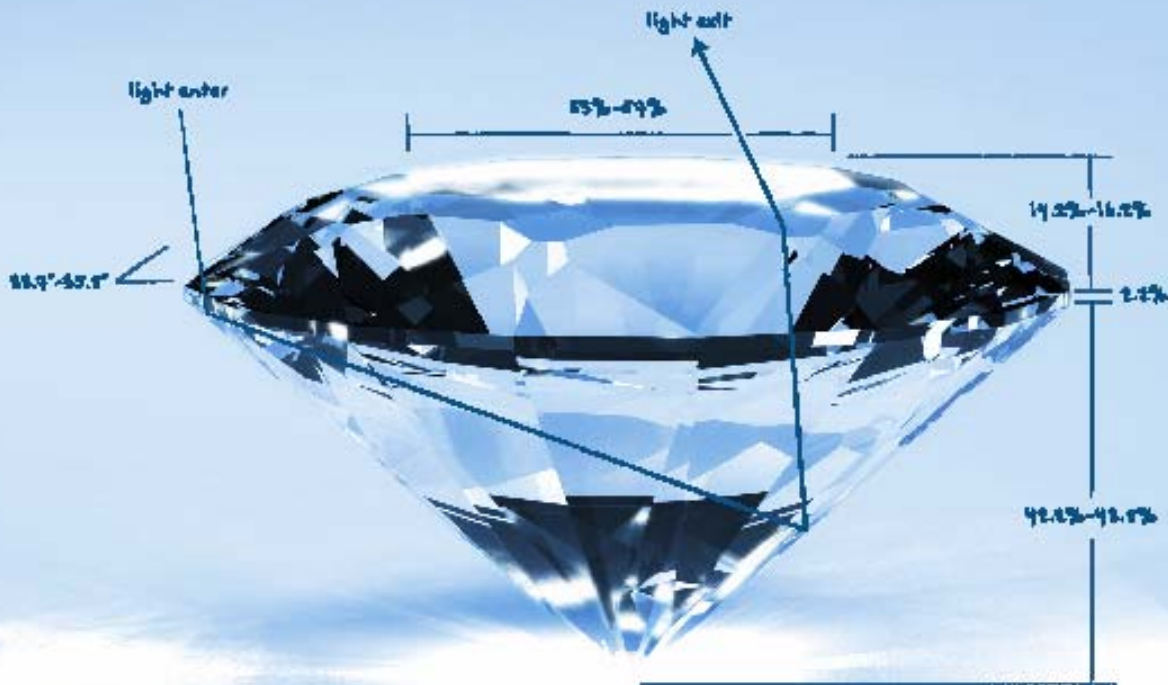
Renewing Members

Sorry, No AIEF Report this month.

Sorry, No ICRM Report this month.

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February 24-25, 2010

**AIIM ERM Practitioner Course and
ARMA NOVA Winter Seminar**

Rosslyn, VA

March 17, 2010

**ARMA NOVA Dinner Meeting
E-Discovery**

Vienna, VA

April 21, 2010

**ARMA NOVA Dinner Meeting
From the Basement to the Boardroom**

Vienna, VA

April 22, 2010

Earth Day Shredding Project

Northern VA

May 19, 2010

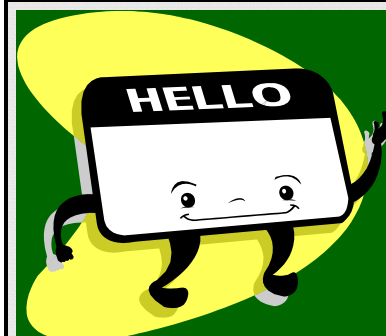
**ARMA NOVA Dinner Meeting
RIM Standards**

Vienna, VA

Newsletter Contributions

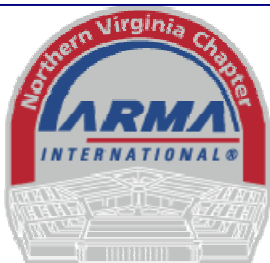
The Editor thanks the following people for their contributions to this month's newsletter:

Mark Mandel, CRM, CDIA+
Angela Tayfun, CRM, PMP,
Crystel Kurtzberg, CRM
Jack Frost
Mike Faber, CRM
George Darnell, CRM



**Join us for our
next meeting!**

Please plan to join us at a future meeting, event, activity or seminar in the coming year.



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c/o George D. Darnell, CRM
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