



# ARMA InNOVAtions

Volume 3, Issue 5

February 2013

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*Marco Polo  
Restaurant  
Vienna, Virginia*

Register for  
the Spring  
Conference!

Early  
Registration  
ends February  
14.

Details inside.

## Best Practices and Standards for Managing Social Media

Please join ARMA NOVA for our February chapter meeting. Our program theme for this chapter season is “The State of the Art in Records and Information Management.” In February Chad Doran, Chief Records Management Office for Arlington County, will join us to discuss the implications of the adoption of social media within organizations and how records managers can adapt practices to address these rapidly changing tools and applications. He shared this presentation at the ARMA International conference in September, where it was very well received.

Upon completion of this session participants will be able to: (1) Understand the issues and challenges of managing social media records, (2) Identify published standards, reports, and guidance for managing Web 2.0 records, and (3) Understand practical strategies for managing social media records within organizations.

(For more about Mr. Doran see page 4)

## February President’s Message

Happy New Year –

Stay warm at Feb. 20 Dinner Meeting with Chad Doran of Arlington County speaking on Managing Social Media Records and Feb. 27 Education Seminar on Attorneys and Algorithms....

Winter in Washington lasts well into February. Escape the weather at our “hot” programs.

Join your colleagues for our dinner meeting on **Wednesday, February 20, 2013**, at the Marco Polo Restaurant at 245 Maple Avenue in Vienna VA featuring **Chad Doran of Arlington County** speaking on **“Best Practices and Standards for Managing Social Media Records.”**

**"State of the Art in Records Management"  
2012-2013 Chapter Year Meetings**

<b>Date</b>	<b>Speaker/Event</b>	<b>Subject</b>
9/13/12	Joint NCC– AllIM	DOI Cloud Based Email Archive with RM and Autoclassification
9/19/11	Fred Pulzello	Assess Your Organization's Information Governance Using "The Principles"
9/23-25/12		ARMA International Conference in Chicago
10/04/12	CRM Preparation Workshop	Joint Meeting with Greater Washington DC and Metropolitan Maryland Chapters
10/17/12	Paul Wester, NARA	NARA RM Directive Update
11/14/12	Susan Cisco, Gimmel Group Sue Trombley, Iron Mountain Consulting	Putting the "People" in People, Process, and Technology
12/19/12	Representative from Training Fu- tures	Holiday charity fundraising event for Training Futures, a non-profit organization that prepares people for more stable, professional office careers – including jobs in records management
1/16/13	Doug Smith Legal Records and Information Man- ager, Wiley Rein	Massive ROI: A Case Study in Retention Disposition
2/20/13	Chad Doran	Best Practices and Standards for Managing Social Media Records
2/27/13	Various Speakers, Spring Seminar	Attorneys and Algorithms: The Case for Technology-Assisted Review and Categorization.
4/04/13	Joint Event with Digital Govern- ment Institute	E-Discovery, Records & Information Management Conference & Expo
3/20/13	Ed McCeney DOI	ECM/ERM in the Cloud
4/17/13	Maria Hishikawa Project Manager, Bureau of Alcohol, Tobacco, Firearms and Explosives	Microsoft 365 Email and Collaboration Services in the Cloud
5/15/13	Mack Sigman, Principal Consultant CSC	SharePoint Governance
6/19/13	Tod Chernikoff ARMA Region Co- ordinator	Installation of Officers & Chapter Year Wrap-up

And register for the **Education Seminar on Wednesday, February 27, 2013**, on **“Attorneys and Algorithms: The Case for Technology-Assisted Review and Categorization.”** The seminar is at the Arlington Campus of George Mason University within two blocks of the Virginia Square Metro Station. And we have arranged **free parking at GMU**. Find more information and register at <http://www.arma-nova.org/programs.htm>

We started 2013 with our dinner meeting on January 16, 2013, featuring Doug Smith of Wiley Rein speaking on “Massive ROI: A Case Study in Retention Disposition.”

Make sure you use our **new ARMA NOVA website address** at [www.arma-nova.org/index.htm](http://www.arma-nova.org/index.htm) – please reset your bookmarks for the new URL.

Our thanks to our Sponsors. Their financial support and assistance with our programs allow us to better serve our members. If your organization would like to become a sponsor in 2012-2013 to raise its profile and further the work of the Chapter, please contact me or one of the Executive Board members.

Mark your calendar NOW with the dates for upcoming meetings in 2012-2013: Dinner meetings at the Marco Polo on February 20, March 20, April 17, and May 15; all-day Education Seminar at GMU on February 27; and our Annual Social in June on a date to be determined.

Make the most of opportunities that the Chapter provides. Come to meetings, get involved in our committees. Committee work is a backbone of our Chapter’s success. Please let me know, if you are interested in joining a committee or if you have suggestions that can improve our Chapter.

I look forward to sharing some time with you this Winter.

Carolyn K. Offutt, CRM, PMP

President  
Northern Virginia Chapter of ARMA International

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## Massive ROI - A Case Study in Retention and Disposition in a Law Firm

### About our Speaker:



Chad Doran, CRM, has over ten years of experience in the field of records and information management in the legal, research and development, and government sectors. Chad is currently the Chief Records Management Officer of Arlington County, where he is responsible for developing and implementing the first county-wide records and information management program. Prior to this, he was a Records Manager at the Johns Hopkins University Applied Physics Lab in Laurel, MD and at Preston, Gates, Ellis and Rouvelas Meeds LLP in Washington DC.

Chad is also a PhD candidate in Information Studies at the University of Maryland's iSchool in College Park, MD, where he is researching how federal agencies manage records generated by social media applications. Prior to that, Chad earned a Masters in Information Management (MIM) from the University of Maryland, a Masters in Business Administration (MBA) from Johns Hopkins University, and a B.A. in Government from the University of Notre Dame. Chad is a Certified Records Manager and is the outgoing President of the Greater Baltimore Maryland Chapter (GBMC) of ARMA.

Chad is the 2012 ARMA International Education Foundation Rita Holt Scholarship recipient and has served on the ARMA International Standards Development team that published the technical report titled *Using Social Media in Organizations*. Chad is the author of several articles including *Anticipating Disruptive Innovation in Records Management* and *Governing the Social Network: How U.S. Federal Department and Agency Records Management Policies Are Addressing Social Media Content*.

## Meeting Logistics

**DATE:** Wednesday, February 20, 2012

**TIME:** 5:30 PM Registration

6:00 PM Dinner

7:00 PM Program

**PLACE:** Marco Polo Restaurant,  
245 Maple Ave. W., Vienna, VA 22180  
703-281-3922

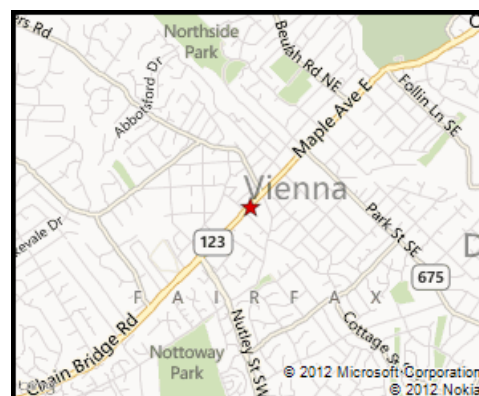
**PARKING:** Free at the restaurant

**METRO:** Vienna Metro plus  
a five minute cab ride

**COST:** \$25.00 Member,  
\$30.00 Non-Member

Register at <https://co.clickandpledge.com/advanced/default.aspx?wid=32497>

### Directions



## Meet A Member: Kenneth Kamppila

Kenneth "Ken" Kamppila is a Business Management Analyst at Booz Allen Hamilton. He recently completed a total revision of the firm's retention schedule. The year-long project involved finding points of contact, scheduling meetings, and speaking with personnel from over 65 distinct departments to develop an information inventory from which he developed the retention schedule.

Ken started his career as a U.S. Army photographer. He spent 22 years photographing events all over the world. Among his interesting assignments was documenting a Search and Rescue mission for missing Congressman Mickey Leland whose plane had crashed in Ethiopia. Ken won numerous photography awards at both the Army and Department of Defense levels.

After retiring from the Army, Ken moved to the Washington, DC area where he accepted a position with Adroit Systems, Inc., which became part of SRA International. Ken spent a combined ten years with both companies. His assignments included Technical Media Specialist, Knowledge Officer, Research Librarian, and Web Usability Analyst.



Ken joined Booz Allen Hamilton in July 2010 and moved to the firm's Records and Information Management team shortly thereafter. He is a member of ARMA, AIIM, and the Special Libraries Association. He recently completed the Essentials of RIM Certificate program and looks forward to taking the Certified Records Manager (CRM) exam in the near future. He has been a member of ARMA-NOVA for two years.

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## Report of the Board

The Board met on Wednesday, January 16, 2013. Major topics of discussion included the upcoming annual education seminar, being held on February 27, 2013 at the George Mason University Arlington campus. The seminar is titled "Attorneys and Algorithms: The Case for Technology-Assisted Review and Categorization," and will provide a deep-dive look into autoclassification and technology-assisted review. Panelists include staff from various law firms, National Archives and Records Administration, Department of Energy, Department of the Interior, the U.S. Air Force, and Kent State University. Continental breakfast, lunch, and snacks will be provided. Early registration ends on February 14, 2013, and cost for early registration is \$125 for members and \$150 for non-members. The ICRM has pre-approved this seminar for 6 CRM credits.

The Board also approved co-sponsorship of DGI's e-Discovery conference on April 4, 2013.

The Board meets on the third Wednesday of every month at Marco Polo Restaurant from 4:30 PM to 5:30 PM, immediately preceding the monthly chapter meeting. Meetings are open and anybody is welcome to attend. We are a volunteer organization, and any and all members are welcome to become involved.

Announcing ARMA NOVA's Spring Conference! ! !

# Attorneys & Algorithms

The Case for Technology-Assisted Review and Categorization



Join us at ARMA NOVA's Spring 2013 Chapter Seminar to get the inside scoop on the latest on technology assisted review, categorization, and management from the panel of legal and record management experts.

Come and get the following questions answered:

- ◆ What is Technology– Assisted Review and Categorization?
- ◆ How does it work?
- ◆ Why consider using this technology?
- ◆ Can you rely on it and defend its use in court?
- ◆ What are its strengths and weaknesses?
- ◆ Has anyone successfully used it to support a RIM program?

Approved for  
6 CRM and 1  
CLE credit  
(pending)



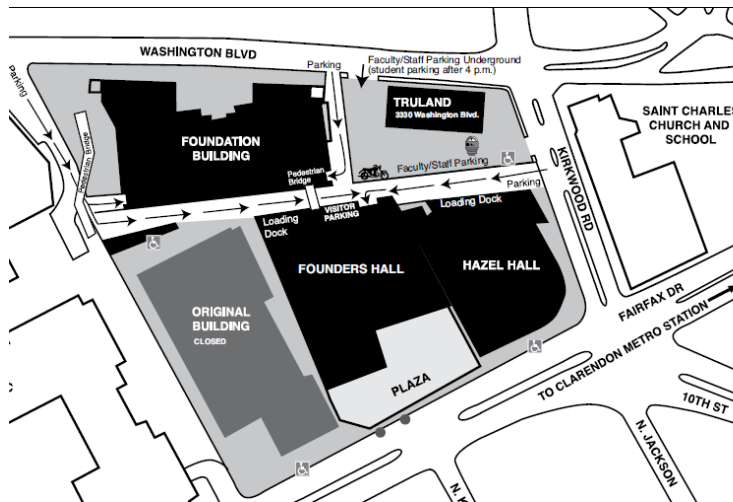
DATE: Wednesday, February 27, 2013

TIME: 8:00 AM – 4:15 PM

PLACE: George Mason University – Arlington, Founders Hall, 3351 Fairfax Drive  
Arlington, VA

PARKING: Included in registration fees.

METRO: 1.5 blocks from Virginia Square/GMU Metro Station



**ARLINGTON CAMPUS INFORMATION**  
 703-993-8999  
 gmu.edu/arlington  
 Find out where you are and where you need to go. Stay connected with the MOBILE MASON app.

**Founders Hall**  
 3351 Fairfax Dr.  
 Arlington, VA 22201

**Original Building**  
 3401 Fairfax Dr.  
 Arlington, VA 22201

**Hazel Hall**  
 3301 Fairfax Dr.  
 Arlington, VA 22201

**Foundation Building**  
 3434 Washington Blvd.  
 Arlington, VA 22201

**Truland Building**  
 3330 Washington Blvd.  
 Arlington, VA 22201



REGISTRATION COST: Includes continental breakfast and lunch

**Early Registration (prior to February 14):**

- \$125 for members
- \$150 for non-members
- \$50 for full-time students
- \$75 for 3 or more from the same company/agency (must all register at the same time to receive the discount)

**Full Registration (after February 13):**

- \$150 for members
- \$175 for non-members
- \$50 for full-time students
- \$100 for 3 or more from the same company/agency (must all register at the same time to receive the discount)

Register at <http://www.ama-nova.org/programs.htm>



## Joint ARMA NOVA/NCC-AIIM Seminar

Attorneys and Algorithms: The Case for Technology-Assisted Review and Categorization  
February 27, 2013

Please join the Northern Virginia Chapter of ARMA and the National Capital Chapter of AIIM for our joint 2013 seminar. Our topic is the increasingly interrelated worlds of technology-assisted review and auto-categorization.

Last year ARMA NOVA and NCC-AIIM co-sponsored a highly successful seminar on autoclassification. The response was so good that we decided to schedule a follow-up seminar, with more case studies and input from our legal colleagues.

What is the state of the art in technology-assisted review and auto-categorization? How much can RIM professionals learn from the legal profession's experience with technology-assisted review? How can these tools be defended in court? What are their strengths and weaknesses? What role will auto-categorization play in addressing the challenge of the Archivist's Managing Government Records directive?

NCC-AIIM and ARMA NOVA have assembled an internationally recognized panel of speakers to address all of these questions and more in an all-day seminar. Come take a deep dive into technology-assisted review and auto-categorization with us.

### Agenda:

- |             |  |
|-------------|--|
| 8:00-8:15   | Welcome/Introductions: Carolyn Offutt, Offutt Advisory Services  |
| 8:15-9:15   | What Does the Archivist's Directive Foretell for Auto-categorization of the Government's Records?: Jason R. Baron, NARA            |
| 9:15-10:15  | Looking under the Hood of an Autoclassification Engine: Denise Bedford, Kent State University                                      |
| 10:15-10:30 | Break  |
| 10:30-11:30 | Case Study #1: Lt. Col. David Sanchez, U.S. Air Force  |
| 11:30-12:30 | Lunch  |
| 12:30-1:30  | Case Study #2: John Montel, Department of the Interior   |
| 1:30-2:30   | Case Study #3: Steven VonVital, Department of Energy   |
| 2:30-2:45   | Break  |
| 2:45-3:45   | Panel Discussion: Technology Assisted Review: A Kissing Cousin to Auto-categorization? Conor Crowley, Bennett Borden, Wendy Curtis |
| 3:45-4:15   | Conclusion/Wrap-up: Elizabeth W. Adkins, CSC   |



**ARMA Northern Virginia Chapter  
Executive Board Meeting  
December 19, 2012  
Marco Polo**

**Present:**

Elizabeth Adkins  
Rebecca Conner  
George Darnell  
Katherine Goodwin  
Carolyn Offutt  
Suzanne Swenson

**Absent:**

Elisabeth Butler  
Anna Seiss Cooper  
Jack Frost  
Charlie Herbek  
Justin Isaac  
John Krysa  
Leanne Peterson

**Secretary's Report**

Rebecca began the meeting by going through the action items from the previous meeting and marking items complete. Action item follow-up is in the minutes and action items following.

**Sponsors**

The Board has discussed guidelines by which the chapter should sponsor an event via AirSet. Sponsorship is not to be entered into lightly. In general if there is a history of beneficial collaboration between the groups, we will sponsor the event. Questions to consider include:

- What is our interest in selling or sponsoring the event?
- Is the event selling product?
- Did a member bring the event to us?

Board approval must occur for a sponsorship.

There was a question as to whether ARMA had guidelines. Carolyn will ask Leanne to research this.

**CRM Attendee Survey**

Carolyn agreed to develop survey questions.

**Education**

Ed McCeney is tentative for March. Jack has not yet confirmed. Carolyn will contact Jack to ask of DoI is on target for March, and to note that we have not seen him at any board meetings this year.

Penny Sayle fell through for February. Justin contacted Chad Doran from the ARMA Baltimore chapter to present in February.

**Spring Seminar:**

Topic is autclassification

Speakers include:

Jason Baron, NARA

Denise Bedford, Kent State University

A three-attorney panel  
Case Study from Colonel Sanchez, Air Force  
Case Study from DoI  
Case Study from OpenText/Recommind?  
Location may not be able to be CSC  
Suzanne will look into Rural Electric Cooperative in Ballston and will report back  
Suzanne offered to help with attendance

**Newsletter**

Carolyn will contact Justin about a December newsletter.

**Communication**

George has been working with AirSet to fix the email issue.

**Treasurer's Report**

Balance at end of 11/2012 was \$14,201.75. Current balance is \$17,784.45.  
We received \$3,000 for Platinum sponsorships from ZAI and OpenText.  
Gift card purchase was rejected. Katherine will try again.  
American Express is still not up and running.  
Katherine will send an annual report.

**Membership**

Jack sent a membership report. There are 103 members.

**Chapter of the Year**

Suzanne has been working with Anna.  
Looked at the list of requirements and outlines what has been done so far this year  
Need statistics for the cover letter  
May need to survey members  
Carolyn will update the strategic plan for the award.

**Bylaws**

Elizabeth will have these done by February's meeting.

**ARMA International**

ARMA's Leadership Academy is offering a Professional Leadership Certificate. This is free to all members of the Board. Board members who take it should report back.

Meeting adjourned at 5:35 PM.



**2012-2013**

### **Chapter Leadership**

President  
Carolyn Offutt  
Offutt Advisory Services, LLC

Vice President  
Elizabeth Adkins  
CSC

Chairman of the Board  
George D Darnell  
Independent Consultant

Secretary  
Rebecca Conner  
Zimmerman Associates

Treasurer  
Katherine Goodwin  
CSC

Membership Director  
Jack Frost  
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Advertising Chairman  
Charles Herbek  
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Education Director  
Mark Mandel  
Open Text

Director at Large  
Anna Seiss  
Independent Consultant

ICRM Liaison  
John Krysa

Chapter Archivist  
Sylvia Lacy-Crow

Webmaster  
Elisabeth Butler  
US Senate

Newsletter Editor  
Justin Isaac  
Booz Allen Hamilton

Hospitality Director  
Suzanne Swenson

## **Newsletter**

ARMA InNOVations is published monthly from September to June by the Northern Virginia Chapter of ARMA International. This newsletter is used to inform chapter members about programs and professional information. ARMA NOVA holds a monthly professional meeting and occasional social programs.

Information and opinions expressed in this newsletter are strictly those of the authors and do not necessarily reflect the official policy of ARMA International or ARMA NOVA. The information in the newsletter also does not necessarily represent the views of the membership or editor. No endorsement of advertisements, seminars, articles, calendar events, or commentaries is intended.

## **Submissions**

ARMA NOVA welcomes contributors to the newsletter, by both members and non-members. Individuals can submit articles, news stories, reports, opinion pieces, chapter notes, and calendar items. Please send any items for publication by the 1st of the month to:

**Justin Isaac**

**Editor, ARMA InNOVations**

**P.O. Box 3763**

**Merrifield, VA 22116**

**[justin.isaac@yahoo.com](mailto:justin.isaac@yahoo.com)**

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