



# ARMA InNOVAtions

Volume 3, Issue 4

January 2013

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Marco Polo  
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Announcing  
the Spring  
Conference!!

Details on  
Page 6-8!!

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

Please join ARMA NOVA for our January chapter meeting. Our program theme for this chapter season is "The State of the Art in Records and Information Management." In January Doug Smith, Business Solutions Manager for Wiley Rein LLP, will join us to discuss how he successfully created and implemented a Big Bucket approach to retention and started on the road of defensible deletion in a very short time, with a significant return on investment. He shared this presentation at the ARMA International conference in September, where it was very well received.



Doug Smith

*(see page 4 for more)*

## January President's Message

### Happy New Year –

### Jan 16 Dinner Meeting with Doug Smith of Wiley Rein speaking on ROI....

It's time to kick off the 2013 New Year with new beginnings, new initiatives, and new opportunities.

Join your colleagues for our dinner meeting on **Wednesday, January 16, 2013**, at the Marco Polo Restaurant at 245 Maple Avenue in Vienna VA featuring **Doug Smith of Wiley Rein** speaking on "**Massive ROI: A Case Study in Retention Disposition.**"

**"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– AllM	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
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	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 keep your eyes open for more on the upcoming Education Seminar in February.

We finished 2012 with our annual charity dinner meeting on December 19, 2012, featuring Training Futures of Fairfax VA. With member contributions and matching chapter contributions, we made a significant donation to Training Futures for their work in preparing students for skilled office work.

We are having a great 2012-2013 program year on the theme “State of the Art in Records Management.” We had a dinner meeting on Wednesday, November 12, 2012, with Susan Cisco and Sue Trombley speaking on “The Role of Records Coordinators”.

On Wednesday, October 17, 2012, we welcomed back Paul Wester of NARA who shared with us the “Update on the NARA Records Management Directive,” which resulted from the Presidential Records Management Order.

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 January 16, February 20, March 20, April 17, and May 15; all-day Education Seminar at George Mason’s Arlington campus in February; 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  
(703) 666-8190      [coffutt@o3star.com](mailto:coffutt@o3star.com)

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

In 2011, Wiley Rein LLP began implementing a retention policy. In eighteen months, nearly 30% of the records collection will be queued for disposition. In this session, you will learn how to create the policy, obtain C-Level approval, and develop momentum for implementation. You will walk away with practical resources that will enable you to begin disposition of records collections with a plan and effective tools, including cost/benefit projections.

Upon completion of this session participants will be able to: 1. Use big bucket theory to create a records retention/disposition policy 2. Identify starting points and blocks to implementing a records retention policy 3. Explore practical tips to reducing cost and delay in processing disposition decisions 4. Develop useful job aids and ideas for electronic processing of retention decisions 5. Recognize and navigate potential obstacles and areas of risk in implementing your plan.

### About our Speakers:



Doug Smith, Business Solutions Manager for Wiley Rein LLP, has been managing legal records and information for more than 20 years. He has worked extensively to develop systems to ensure the efficient, effective, and compliant handling of records. Doug co-lead the revision of the ARMA Glossary and has assisted with ARMA guidelines dealing with RIM/IT relations, litigation support, and handling electronic messages as records. He is a former president of the Greater Washington D.C. chapter of ARMA, and currently serves as that chapter's vice president. He can be reached at [dsmith@wileyrein.com](mailto:dsmith@wileyrein.com).

## Meeting Logistics

**DATE:** Wednesday, January 16, 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

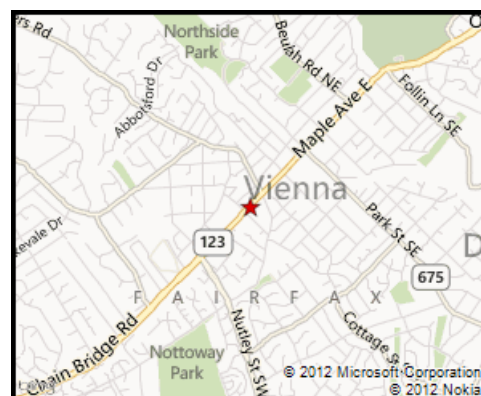
**PARKING:** Free at the restaurant

**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





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?



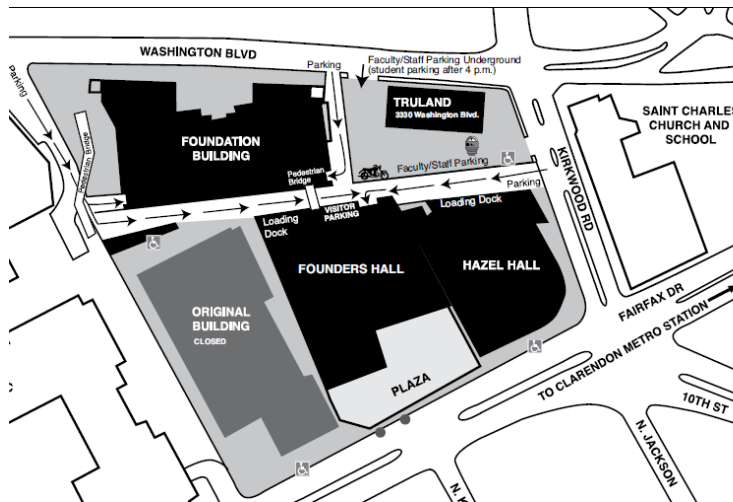
DATE: Wednesday, February 27, 2013

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  | Title TBD: 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   |



**2012-2013**

### **Chapter Leadership**

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Offutt Advisory Services, LLC

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## **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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