



Joint AIIM and ARMA Meeting - All Day Seminar March 13, 2013

Date: March 13, 2013

Place: Embassy Suites, 2925 Emerywood Parkway, Richmond, VA 23284

Meeting: 8:30am – 4:00pm - all day meeting; refreshments all day & lunch will be served

Cost: \$85 for early registration by Feb 28; \$100 registration after Feb 28 for all member / non-member attendees

Register for the Event: <http://www.eventbrite.com/event/5500193226> to pay on-line or send a check payable to "Old Dominion AIIM" to: Cary Adams, Chesterfield Utilities, P.O. Box 608, Chesterfield VA 23832.

Speaker & Topic Synopsis

Chris Gatewood – “Dropping Anchor Under the Waterfall: Legal and Policy Challenges of the Social Data Deluge”

Speaker: Christopher Gatewood founded Threshold Counsel, PC in Richmond where he works with business clients as outside general counsel for companies small and large, with a focus on their IT and intellectual property needs. Chris has a broad range of experience in technology, software, and internet law, social media matters, reputation management, licensing, trademark, and copyright matters. He went to Wake Forest and the U.Va. School of Law.

Topic: Social is here. Even if your company is not actively using it for corporate purposes, its employees are using it for any and all purposes. Just as social media has multiplied communication, publication, and records management challenges, it has also amplified a number of legal and regulatory risks. Employment matters, securities law compliance, defamation, and breaches of confidentiality are not new concerns for records and data management professionals. But the number of people who can drag an organization into these areas, and the speed with which they can do so, have both had enormous upswings in the social age. We will talk about some common examples of increased risk in the social era, and how to use policies, training, and active monitoring to manage those risks.

Bill Neale - “Records Management - It's in the Process”

Speaker: Bill Neale has over 30 years experience in document management and imaging, and is an internationally recognized expert in standardization of information and image management. Neale has chaired numerous AIIM standards committees. He is past chair of the U.S. delegation to the International Standards Organization committee on Imaging Application standards, and is the Convenor of an ISO Working Group. He has served on the AIIM international Board of Directors and has served on ARMA International's Standards, Publications and Nominating committees. He is a recipient of AIIM's Distinguished Service Citation, Thomas C. Bagg Life-Time Standards Achievement award, and is a member of AIIM's Company of Fellows. He was

awarded AIIM's Award of Merit, the association's highest honor. He has also served as President of the Richmond, VA AIIM and ARMA chapters, and is a former Certified Records Manager.

Topic: Records are created by business processes, used in business processes and then managed throughout their lifecycle through records administrative processes. This session will address the ways best-practice workflows can be used for records declaration and disposition phases as well as for reviews such as those required for vital records. Integration of records management and business process management for accurate, automated records declaration and classification will also be discussed. Learning Objectives:

- 1) Explore how workflow technology can be used to automate records processes.
- 2) Examine how best-practice processes can lower costs and mitigate risk
- 3) Identify how you can manage more records without hiring additional resources

Caroline Walters - "The Principles & CIA: RIM Meets Information Security"

Speaker: Since 2008, Caroline Walters, CRM has developed the first comprehensive RIM program at the University of Virginia. She has presented at AIIM, Educause and ARMA Chapter meetings. She previously was the records manager at UNC-CH and began her records management career at the NC Government Records Branch. Prior to graduate school, she managed cancer research projects at UNC-CH. She has a BA and MA from North Carolina State University and a MLS from North Carolina Central University. She completed her CRM in 2011.

Topic: In 2008, the University of Virginia took the unique step of moving records management from the library world to information security. Like The Principles, the information security profession has basic principles: Confidentiality, Integrity, and Availability (CIA). CIA is used to direct and evaluate an information security program. This session reviews the connections between The Principles and CIA showing how information security and records management can work together. This collaboration can enhance compliance, efficiencies, and education throughout your organization.

Sam Elbeck-- "Data Archiving and Migration Best Practices"

Speaker: Sam Elbeck is the Director of Professional Services at Globanet, where he is responsible for all projects delivered by Globanet's highly skilled technical resources; including designs, implementations, data migrations and many other services that Globanet provides. Prior to joining Globanet Sam spent time at Symantec as a Lead Architect designing archiving, compliance and data management solutions and at IBM where he started his technical career in administration and architecture of messaging infrastructures. He then went on to build a team of engineers that specialized in data management and archiving solutions. Sam carries an MBA and holds an undergraduate degree in International Business as well as several other technical certifications.

Topic: The presentation will address how data archiving and e-discovery solutions help organizations comply with government regulations, provides a single repository for disparate data and promotes vast storage savings. Sam will discuss best practices and cover how they make the legal discovery process more efficient and manageable. Attendees will also learn how organizations are consolidating archiving solutions using the latest migration technologies on-premise and cloud solutions.

Records Management Jeopardy Lunch

Test your Records and Information Management knowledge with this fun game everyone can play. Records Management Jeopardy is just like the game show (without the big money) and prizes will be given to the finalists and the winner!