



May 2011  
Volume 42, Issue No. 9

2008-9 and 2009-10 ARMA International  
Newsletter of the Year Award Recipient



**For the Record**  
Newsletter of the Oregon Chapter

ARMA INTERNATIONAL—The Information Management Professionals

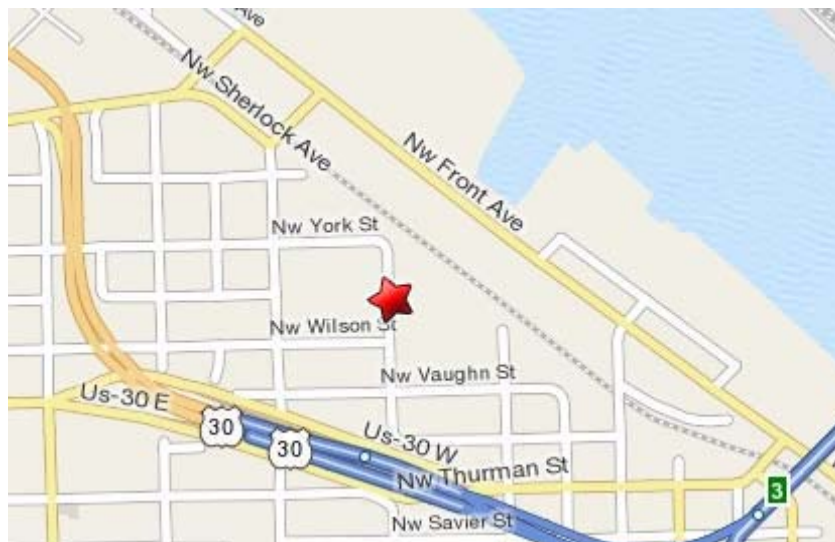
**Annual Awards Luncheon**  
Includes installation of next years officers  
Recognition of outgoing officers  
Chapter Member of the Year  
Tour of Iron Mountain Facility following  
the meeting

**Date:** Tuesday, May 10, 2011

**Time:** 12:00 p.m.

**Location:** Iron Mountain  
2116 NW 20th Avenue  
Portland, OR

**Cost:** Complimentary to members and guests



*Continued on next page*

Oregon ARMA  
P. O. Box 40004  
Portland, OR 97240-0004

[www.oregonarma.org](http://www.oregonarma.org)

Inside This Issue

Chapter Meeting Program— Annual Awards Luncheon	1
From the Square Office—Cheryl Dorman, Chapter President	2
Members Only—Kimberlee Akimoto, Membership Director	3
Check It Out—Kimberlee Wollenburg, Education Director	4
April Chapter Meeting Recap—Kimberlee Akimoto, Membership Director	5
Advertising Rates	5
Message from the Great Northwest Region—Jennifer Winkler GNW Region Coordinator	9
Leadership Conference Information	10
Ask the CRM—Bob Dalton, CRM	12
Registration	14
Officer Page	15

## FROM THE SQUARE OFFICE

### CHERYL DORMAN, PRESIDENT



As our chapter year draws to an end, I want to take the time to say THANK YOU! to all of you, our chapter members, for your continued support throughout the last two years. As I step down from President and let someone else take over, it's going to be with mixed feelings. I have enjoyed the last two years as your President with all its ups and downs and many challenges to overcome. It has truly been an out of the box experience for me.

One cannot be president of such a group without the help of others, so I'd also like to acknowledge the wonderful Board we've had the last two years. Without them, nothing would have been done. They are a great group of people willing to step in and fill in the gaps, regardless of their titles or posted board descriptions. It's been a time of learning about each other, how working together as a team makes us stronger and making new friends in the process.

Because you've been such a great chapter to serve, we plan on putting our name in the hat for Large Chapter of the Year. As a chapter, I believe we have outdone ourselves this year. On top of that we're also going for Newsletter of the Year (already won twice in a row!) and for Website of the Year. Make sure you get to the ARMA International Annual Conference coming up in October this year to be held in Washington, D.C. Oregon is beautiful in the fall, but I'm really looking forward to seeing the East Coast at that time of year. All the winners will be announced at the conference.

Since I'm still going to be involved with the Board, but as a back seat member, I will still get to hear about all the wonderful things that have already been brought up as ideas for our next chapter year. I am excited for our chapter, as we've got a lot going for us. Even though we've had such a great year, I believe we can do better. Stay tuned to see who your next President and will be along with all the board members. You might see some new faces along with some familiar faces. All positions will be announced at our May chapter meeting held at Iron Mountain, so make sure you're there to support your new board.

Thank you, Oregon Chapter. It's been a great two years!





## MEMBERS ONLY

Your exclusive pass to RIM resources and membership benefits

Kimberlee Akimoto, Director of Membership

Hello Oregon ARMA members! Here is the membership update for May 2011:

Welcome DJ Quinney, our newest member!

Congratulations to Oregon ARMA President Cheryl Dorman who is celebrating her 6-year membership anniversary (and wrapping up her two-year term!) in May.

### ARMA International Announces "Essentials of RIM" Certificate

Are you an asset to your organization? Do you have the skills needed to manage the records and information within your organization as a strategic component for success? ARMA International's Essentials of RIM Certificate courses are designed for entry-level information management professionals and other individuals whose jobs involve records, such as attorneys, paralegals, IT specialists and, administrators. All courses are offered online for convenient and flexible training on YOUR schedule.

For 55 years, ARMA International has been the go-to source for professionals who manage information. Now, you can earn a certificate from ARMA International that will demonstrate that you understand the essentials of managing records and information.

Essentials of RIM Certificate holders will have completed the following courses:

- What is RIM? (*Coming soon!*)
  - [Assessing and Mitigating Risk](#)
  - [Auditing Basics for RIM Professionals](#)
  - [Electronic Records Management](#)
  - [Managing Physical Records](#)
  - [Micrographics](#)
- Privacy and Security in RIM (*Coming soon!*)
  - [Records Management and the Law](#)
  - [Records Retention and Disposition](#)
- Vital Records and Business Continuity (*Coming soon!*)

For more information, visit [www.arma.org/essentials](http://www.arma.org/essentials)

**TAB isn't just folders and shelving.**

Contact your TAB Representative to learn more about our Professional Services:

- Consulting in Records & Information Management
- Outsourcing
- File Conversions/Inventory
- Records Design & Storage Solutions
- File Product Solutions
- File Room Design & Storage Planning

TAB Products • Phone: 503.223.4437 • Toll Free: 800.333.9098

W W W . t a b . c o m

Newsletter Editor—Jane McGarvin

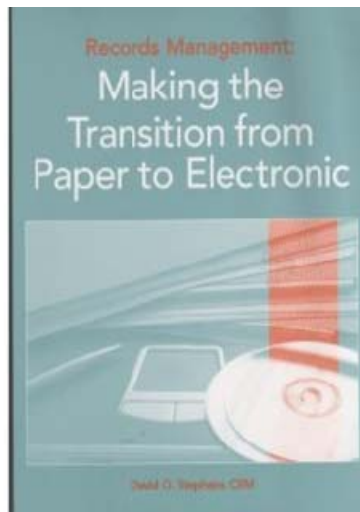
Cheryl Dorman, Chapter President

"For the Record" is published by Oregon ARMA, P. O. Box 40004, Portland, Oregon 97240-0004. The ARMA International trademark is registered with ARMA International, 11880 College Blvd., Suite 450, Overland Park, KS 66210. All rights reserved. Reproduction of any part without written permission of the editor is prohibited.

Printed in the U.S.A.

## CHECK IT OUT

**KIMBERLY WOLLENBURG**  
**DIRECTOR OF EDUCATION**



### Records Management: Making the Transition from Paper to Electronic

David O. Stephens, CRM  
ISBN: 1-931786-29-1

Traditional records and information management (RIM) programs have been organized around paper-based, physical recordkeeping systems and processes. However, organizations must transition from the paper-based model to a new model built around the management of electronic records to optimize the value of information by ensuring that it is easily accessible, complete, true and accurate, and fully usable for any and all legal and business purposes. *Making the Transition from Paper to Electronic* focuses on 10 key ingredients for making this transition.

#### Major topic areas include:

- records retention
- auditing and compliance
- recordkeeping and the law
- improving recordkeeping system performance
- records protection
- information access, privacy, and security
- software solutions
- digital records preservation

Library materials are available for loan to ARMA Oregon members. Take advantage of this valuable resource at: <http://www.oregonarma.org/library.php>.

*I'm still shopping! If there are any resources you'd like to see added to the library, please feel free to email me at [kwollenburg@co.clackamas.or.us](mailto:kwollenburg@co.clackamas.or.us)*

## APRIL CHAPTER MEETING RECAP “ONE SIZE DOES NOT FIT ALL: SMALL AND MID-SIZED LAW FIRM RECORDS MANAGEMENT”

**KIMBERLEE AKIMOTO, MEMBERSHIP DIRECTOR**

Oregon ARMA was honored to have Sue Lord and Andrew SanAgustin as program speakers at our April Chapter Meeting. Their presentation, “One Size Does Not Fit All: Small and Mid-Sized Law Firm Records Management,” offered a unique perspective on our profession while providing practical tips that can be applied in any records management environment.

The speakers kick-started the meeting by introducing themselves and the law firms that they work for:



*Sue Lord*

Sue is the Records and Information Manager for Vandenberg Johnson & Gandara, LLP in Tacoma, WA. Her primary duties include supervising the firm library, managing the firm’s business and client records, supervising the firm’s computer network, and serving as the “on-site” “help-desk” person. She is also the Conflicts Manager and Docketing Clerk and serves as the Chair of the Technology Committee for the firm. She has been with VJ&G for over 21 years.

Andrew is the Records and Conflicts Manager for Foster Pepper, PLLC and has been a records and information management professional for 20 years. His career spans various industries with a specialty in law firm records and conflicts management. His area of expertise includes back-end system development and front-end user interaction, policy creation, standardization, change management,

*Continued on next page*

### Advertising Rates

Effective September 1, 2008, the advertising rates for 9 issues are as follows:

Full Page.....\$315                      Half Page ..... \$255

Quarter Page.....\$215                      Third Page .....\$230

One Month Ad, Any Size ..... \$55

All copy must be submitted in either .tif or .pdf format by the 10th of the month  
to Newsletter Director Jane McGarvin.

Phone: 503-635-0236

Fax: 503-697-6594

Email: [jmgarvin@ci.oswego.or.us](mailto:jmgarvin@ci.oswego.or.us)

and electronic data management. He has implemented new records management systems, document management systems, and e-mail management systems into various industry cultures.

The speakers brought copies of ARMA International's ["Generally Accepted Recordkeeping Principles"](#)

(GARP) and stressed the importance of information governance within any organization. These principles, along with other records management best practices, provide valuable guidance that can be applied not only in the legal environment, but in other records management environments as well.



Andrew SanAgustin

Conflicts management is one area that is specific to law firm records management. Generally, it is an inquiry to determine whether a conflict of interest exists before an attorney or law firm agrees to take on a potential new client. Since penalties can be steep, law firms take conflicts management seriously. Both Sue and Andrew's law firms manage this process electronically through the use of databases (Sue's small-sized firm has 87,700 database entries while Andrew's mid-size firm has 500,000+ database entries). Conflicts checks are run daily.

The speakers then moved on to records retention schedules and file naming conventions. Since there is no "one size fits all" template for law firms, both look to best practices for guidance. To make it easy for users to follow, both law firms keep the number of records series categories to a minimum.

Sue's law firm (VJ&G):

1. Administrative
2. Financial
3. Time
4. Client Files

Andrew's law firm (Foster Pepper):

1. Administrative
2. Client Files
3. Vital
4. Personal

In developing a records retention plan for each record series, the speakers suggested looking at government agency regulations (i.e. Code of Federal Regulations, United States Code, Oregon Revised Statutes, etc.), professional rules of conduct, and statutes of limitations and court rules.

When the time comes to destroy a record, it is important to determine the appropriate destruction process and method to use, particularly if the records contain confidential information. Records Managers should determine whether there are any applicable state or federal laws that dictate how confidential information must be destroyed. For instance, the Oregon Consumer Identity Theft Protection Act requires protected personal information to be destroyed by

*Continued on next page*

“burning, pulverizing, shredding or modifying a physical record and by destroying or erasing electronic media so that the information cannot be read or reconstructed.” See [ORS 646A.622](#).

The destruction process at Sue’s law firm utilizes a Destruction Memo which identifies the records to be destroyed and requires signed authorization before destruction takes place. The process includes a check for “litigation holds.” An index of all disposed records is permanently retained.

At Andrew’s firm, once a matter is closed and the applicable retention period has expired, the firm may either return the records to the client or an attorney will review the records and provide authorization for them to be destroyed.

The speakers closed with some final thoughts and recommendations related to electronic records management and provided a list of recommended reading. The presentation slides, including the list of resources and recommended reading, is available for download on [www.oregonarma.org](http://www.oregonarma.org).



Members enjoying Lunch

LESS MORE  
**PAPER WORK**

Contact us today so we can  
help with your paperLESS needs!

14780 S.W. Osprey Dr. Ste 240  
Beaverton, OR 97007  
503-641-0800 ~ 800-444-8688

**INTEGRA**  
PAPERLESS BUSINESS SOLUTIONS

[www.IntegraECM.com](http://www.IntegraECM.com)

GO PAPERLESS, GO DIGITAL!



**Fortunately, you can trust one company to protect it.**

Information. Created and shared in astonishing quantities and formats. Fortunately, you can partner with Iron Mountain to customize a Compliant Records Management program that meets these complex information challenges. We're the trusted partner of over 90,000 companies around the world, and we'd like to talk with you. Please call 800-899-IRON, or visit [www.ironmountain.com/crm](http://www.ironmountain.com/crm).



Records Management | Data Protection and Disaster Recovery Services | Secure Shredding | Digital Archiving  
Electronic Discovery Support Services | Health Information Services | Document Management Solutions

© 2007 Iron Mountain Incorporated. All rights reserved. Iron Mountain and the design of the mountain are registered trademarks of Iron Mountain Incorporated.



## Message from the Great Northwest Region

Hello GNW Region Members,

For many of you, this is the last month your chapter will be having a meeting, and for some of you, there is one more meeting left in the ARMA year. Whichever fits at the time you read this message, I hope your ARMA year has been successful and educational. I would like to take a minute to thank all the volunteers who have given their time over the past year to make each of our GNW chapters so great! From the board members, to the webmasters, to the person who sits at the registration table and greets everyone with a smile, everyone has made a contribution to the success of your chapter over the year. Without these individuals, we wouldn't have the educational content, the food and beverages, the informational newsletters and webpages, etc. So please at your next meeting, be sure to thank them or if you aren't able to get to the meeting, send them an email.

And of course, we also want to include all of YOU, the members, in that thank YOU as well. Your attendance at meetings, reading the newsletter, visiting the website, sharing resources also contribute greatly to the success of your chapter. Support in any way, regardless if it's many hours or just a few is always appreciated and welcome.

Now is the time when many boards are filling positions or committees need volunteers. I highly recommend seeking out a board member and asking them what needs to be done. Everyone has some talents and you'd be amazed by what you can help with. Maybe you're new to the profession, volunteer to work at the registration table, it's a great way to meet everyone! Been around for a few years, bring that expertise to a panel or tap into your resources for speaker ideas. I started as newsletter editor for the Bellevue/Eastside Chapter many years ago and over the years have been programs chair, fill in secretary, vice president and president and am now going into my 2<sup>nd</sup> term as Region Coordinator. I never expected to be doing this when I started out as newsletter editor many years ago! But each experience has enriched my life, both professionally and personally in some way. I'm not going to give the standard it only takes about an hour a week, it can sometimes be more, but what I have gained in support and resources far outweighs the number of hours spent. Plus the satisfaction of fulfilling a goal, finishing out the year, and bringing quality educational programs to members is a great feeling.

Another great way to get involved is to attend the Leadership Conference this year. Most members think Leadership is just for board members, but anyone is welcome and encouraged to attend. ARMA International provides a wonderful speaker and this year we have Dale Mask. I've heard Dale many times and each time I learn something new. Leadership will be hosted by the Oregon Chapter this year and is being held in Portland in June. A lovely time to be in Portland! Please do consider joining us.

Thank you all again for making this year GREAT for the Great Northwest Region of ARMA!

*Sincerely*  
*Jennifer Winkler, GNW Region Coordinator*

**AVAST YE MATEYS!**  
**Thar be a Leadership Conference on the horizon!**



**WHEN:**

June 3<sup>rd</sup> & 4<sup>th</sup>, 2011

**WHERE WE BE:**

The Red Lion Hotel  
 Portland Convention Center  
 The Port of Land in Oregon

**WHO'LL BE SPEAKIN':**

TREVOR MITCHELL

Director of Member Services, ARMA International  
*“ARMA HQ Resources - Success for your Chapter”*

KOMAL GULICH, CRM

Association Director and recently elected as our incoming President Elect  
 ARMA International Board of Directors  
*“ARMA Board Update: Working for You”*

DALE MASK

Professional speaker and business trainer for Alliance Training and Consulting  
*“The Leadership Action Connection”*

Our focus this year will be:  
 How to increase membership  
 How to motivate members to volunteer  
 Avoiding “Board Burnout”

**WHAT THE FARE BE TO ATTEND:**

The registration fee for this year’s conference is \$75 which includes a continental breakfast both days, lunch on Friday and snacks.

**WHERE WE BE STAYIN:**

Reservations should be made at the Red Lion by calling 800-343-1822. Be sure to ask for the ARMA Conference room rate.

**A PARTYING WE GO ON FRIDAY NIGHT:**

There will also be a No-host dinner on Friday night. Details are still being determined on exactly where that will be. Stay tuned.  
 Following dinner, ye may see the sights of Port Land or visit the local pub for some grog. Or ye may retreat to the hospital-ity suite for some treasurable fun!

**THAR BE MORE!**

As you can now tell, after being on the island last year, we’ve become pirates! So be prepared to learn a lot, meet some new mates and have some fun! We got a few surprises in store fer ye!  
 Check the region website for updates and the conference registration form.

**BE THERE OR BE PREPARED TO WALK THE PLANK! Aaargh!**

# Access the Right Solutions



The Records and Information Management services of Access are now available in Oregon.

- Records storage & management
- Imaging and web-based electronic document management
- Data protection services & media rotation
- Secure destruction of documents, media, hard drives and products

Learn more about the superior quality and cost-effective solutions Access offers at:

**[www.accesscorp.com](http://www.accesscorp.com)**



## ASK THE CRM

### BOB DALTON, CRM

**Is the “Paperless Office” still a Myth?** Question was asked by a participant at a seminar.

Response:

This is a question that arose from an article written The New Yorker, 25 Marcy in 2002: “The Social Life of Paper” by Malcolm Gladwell, reflecting on how computer technology was supposed to provide the paperless office.

It is my contention that the “Paperless Office” is no longer a myth for both public and private organizations. Unfortunately, technology has grown faster than our ability to adequately manage electronic information effectively from a records management standpoint. While the information is being created by individuals within organizations, we are losing the same information by not managing information produced by of technology such as email, blogging, Wiki’s, Twitter, and Facebook. Basically, we are losing our organizations’ business memory.

One only has to follow the legal, records management and other information management listservs to recognize the legal problems facing organizations who do not take steps in managing their information. There does not seem to be one day that goes by when there is not a court case at the local, state or federal level on litigation and sanctions for the loss of or inability to find documentation required in a lawsuit. But as a company lawyer once told me, “all we need is another good lawsuit to get the attention of management on the need for a document management program”. With this message in mind I would review current litigations in the federal and state courts that may be related to the business of the company. I would then send a copy of the document(s) to the appropriate areas within the company and to the lawyer for his information. By being pro-active I accomplished two things:

1. Provided internal clients with current articles on possible problem areas.
2. Increased internal client awareness of the organization’s records management program.

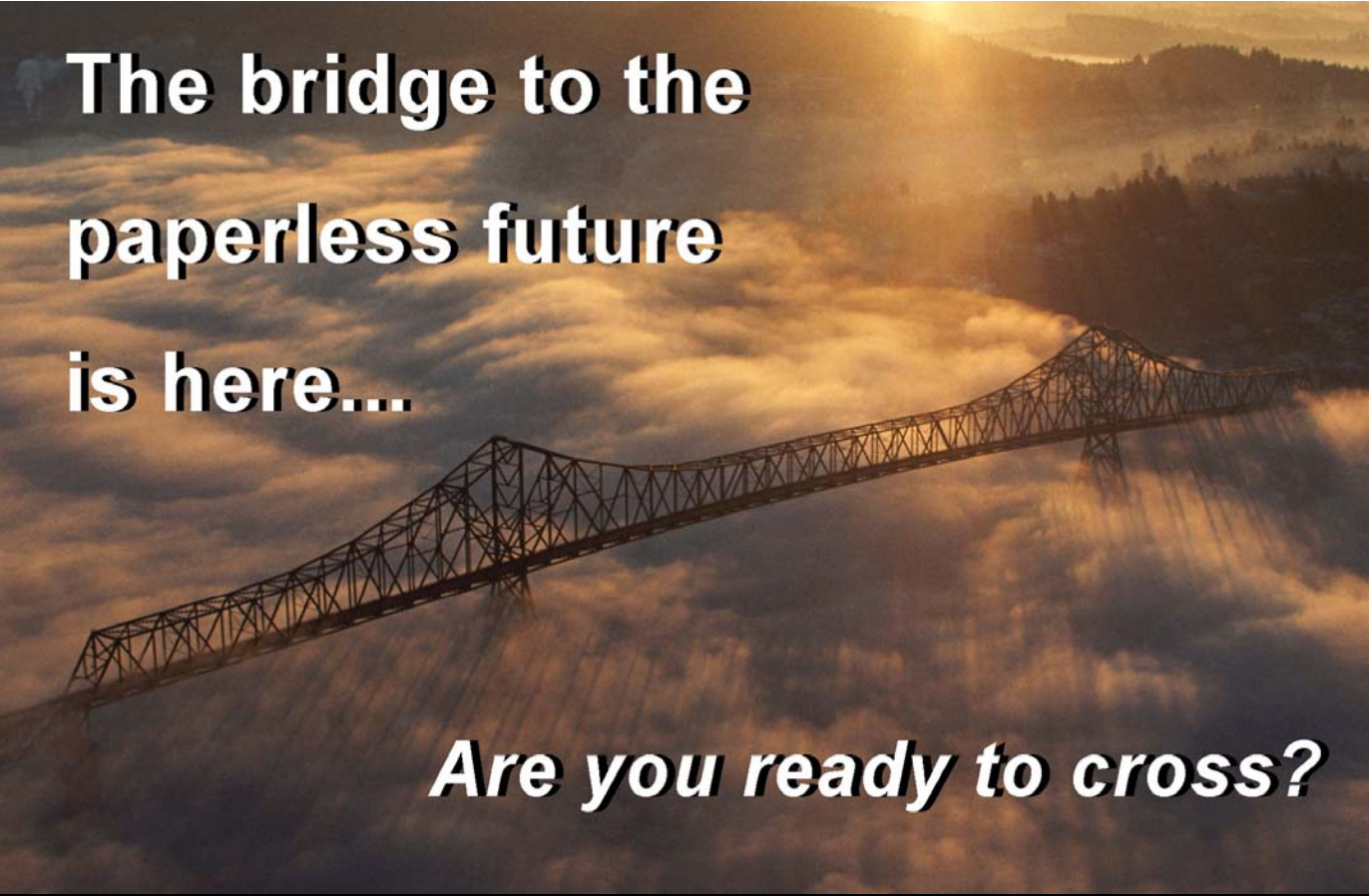
The following are a few articles of interest on various document management topics that were recently on the Records Management Listserv:

- Top 7 Legal Things to Know about Cloud, SaaS and eDiscovery — CIOUpdate.com - <http://bit.ly/fdFHzT>
- FTC Issues Guide for Businesses on Securing Digital Copiers : Info Law Group - <http://bit.ly/eKicPc>
- Gmail Tips: How to Take Chat Off the Record; Archive E-Mails - <http://bit.ly/dMa9Fw>
- The Revolution Should Not Be Digitized—Put It on Microfilm Instead | Discoblog | Discover Magazine - <http://bit.ly/gJtXxy>

In addition, there are resources that may provide some guidance for the records manager on the use of the new technologies. For example:

- Guidelines and Best Practices for Social Media Use in Washington State – <http://www.sos.wa.gov/archives/RecordsManagement/ElectronicRecordsManagementAdviceandResources.aspx>.
- Guidance on Managing Records in Web 2.0/Social Media Platforms, October 20, 2010 - <http://www.archives.gov/records-mgmt/bulletins/2011/2011-02.html>
- Guidance on Managing Records in Cloud Computing Environments, September 30, 2010 <http://www.archives.gov/records-mgmt/bulletins/2010/2010-05.html>

In closing, I believe RIM professionals are tasked to be aware of the problems an organization may encounter when managing the technologies of the 21st Century. I hope the resources outlined in this article may be useful to the RIM professional in becoming aware of both the positive and negative points of use of technology.



**The bridge to the  
paperless future  
is here....**

***Are you ready to cross?***

**Discover how Archive Systems is changing the way  
Oregon manages documents.**

Everyone sees a future that is increasingly paperless, but paper continues to play a major role for every company today. Archive Systems delivers a bridge to that future by integrating digital technologies with state-of-the-art records management services. From business records storage and Virtual File Delivery to on-demand document management and accounts payable automation, we offer the services and solutions that will help you make the journey at your own pace.



23070 NE Townsend Way  
Fairview, OR 97024  
[www.archivesystems.com](http://www.archivesystems.com)

Business Records Storage | Secure Document Shredding | Offsite Data Storage  
Virtual Records Center | On-demand Document Management | Imaging and Workflow Automation

**OREGON CHAPTER OF ARMA INTERNATIONAL**

**Meeting/Seminar Registration Form**

**Chapter Recognition Meeting  
Swearing in of new officers  
Announcement of Chapter Member and Leader of the Year**

**Tuesday, May 10, 2011  
12:00 p.m.**

**LOCATION:  
Iron Mountain**

**Portland, OR**

**Click on <http://www.oregonarma.org/meeting.php?ID=141>**

**Cost: NO COST (Iron Mountain sponsoring Lunch)**

**Register online at OREGONARMA website  
Phone: 503-972-2623 - Cheryl Dorman  
FAX: 503-274-2908—Attention: Cheryl Dorman  
Email: [crd@iniciigroup.com](mailto:crd@iniciigroup.com)**

**Or Mail form to:  
ARMA Oregon  
P O Box 40004  
Portland, OR 97240**

**Name:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Company Name:** \_\_\_\_\_

**Name(s) of Guests(s)** \_\_\_\_\_

**REGISTRATION DEADLINE:**

**Reservations required by April 8, 2011**

Oregon ARMA  
P. O. Box 40004  
Portland, OR 97240-0004

[www.oregonarma.org](http://www.oregonarma.org)



### OREGON ARMA OFFICERS

<b>President</b>	Cheryl Dorman crd@inicigroup.com	inici group, Inc. 3030 SW Moody Ave, Suite 104 Portland, OR 97201	503-972-2623 (O) 503-274-2908 (F)
<b>Vice President Programs</b>	Bruce Schinkelwitz, CRM bruceschinkelwitz@me.com	8868 SW Amicus Terrace Beaverton, OR 97007	888-901-3401 (O)
<b>Vice President Facilities</b>	TracieLyn Rydzewski tracielyn.a.rydzewski@intel.com	Intel 14533 Walnut Grove Way Oregon City, OR 97045	503-680-6974 (O)
<b>Secretary</b>	Debbie Baidenmann dbaidenmann@ci.beaverton.or.us	City of Beaverton P O Box 4755 Beaverton, OR 97005	503-526-2436 (O) 503-526-2479 (F)
<b>Treasurer</b>	Dwight D. Wallis, CRM dwight.d.wallis@co.multnomah.or.us	Multnomah County Records Management 1620 SE 190th Portland, OR 97223	503-988-3741 (O) 503-988-3754 (F)
<b>Webmaster Director</b>	Tyrene Bada tyrene.bada@pcc.edu	Portland Community College 12000 SW 49th Avenue Portland, OR 97219	503-977-8583 (O)
<b>Newsletter Director</b>	Jane McGarvin, MMC jmcgarvin@ci.oswego.or.us	City of Lake Oswego P O Box 369 Lake Oswego, OR 97034	503-635-0236 (O) 503-697-6594 (F)
<b>Education Director</b>	Kim Wollenburg kwollenburg@co.clackamas.or.us	Clackamas Water and Environment Services	503-742-4605 (O)
<b>Membership Director</b>	Kim Akimoto kimberlee.akimoto@gmail.com	TriMet 4012 SE 17th Avenue Portland, OR 97202	503-962-6489 (O) 503-962-3095 (F)
<b>Immediate Past President</b>	Timothy Hunt, CRM tim.hunt@portlandoregon.gov	City of Portland 1221 SW 4th Ave, Room 140 Portland, OR 97204-1987	503-823-4565 (O) 503-823-4571 (F)
<b>2010-11 Great Northwest Region</b>			
<b>Region Manager</b>	Marc Simpson msimpso@co.pierce.wa.us	Pierce County Public Works	253-798-3563
<b>Region Coordinator</b>	Jennifer Winkler jennifer.winkler@seattle.gov	City of Seattle	206-684-8154
<b>Region Treasurer</b>	Timothy Hunt, CRM tim.hunt@portlandoregon.gov	City of Portland	503-823-4565 (O)