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## The Liberty Bell Chapter of Philadelphia

Presents  
A One-Day Seminar

# Compliance, Litigation, and Operations: The Three Pillars of Records Management

### FEATURING



Julie Gable, CRM, CDIA, FAI

Wednesday, February 13, 2008  
7:30 A.M. – 5:00 P.M.

**Holiday Inn Independence Mall**  
4th & Arch Streets  
Philadelphia, PA 19106

## About the Speaker

Julie Gable is president and founder of Gable Consulting LLC, an independent firm that specializes in electronic records management strategy and implementation. Now in its 18th year, the company serves clients in pharmaceuticals, government, financial services and other industries. The firm delivers practical, real-world approaches to information management challenges.

Ms. Gable has more than 25 years' experience in document-based information management. She is the Associate Executive Editor of *The Information Management Journal* and currently writes NewsWire, ARMA's monthly feature on trends in records management. Her articles have appeared in *Search CIO*, *The Records and Retrieval Report*, *Imaging World*, *The Dallas News*, *Finance Canada*, *Forbes*, *CIO Decisions*, and Gartner Group's Advisory services. Her popular column, "The Information Lifecycle" appeared in *Transform Magazine* for several years. She is a frequent speaker at national and international conferences.

Ms. Gable has a BS in Management from Drexel University and an MBA in Finance from St. Joseph's University, both in Philadelphia. Her alphabet soup of certifications includes Certified Records Manager (CRM) and Certified Document Imaging Architect (CDIA). She also has AIIM's Master and Laureate in Information Technology (MIT, LIT) for achievement in document management. In 2003, Ms. Gable was named a Fellow of ARMA International (FAI) in recognition of distinguished service to the information management profession.

## Who Should Attend?

This seminar is intended for records managers and analysts, risk managers, privacy officers, IT managers and analysts, content specialists, tax and legal representatives, and other interested in the most important records issues facing business and government organizations today. This seminar is designed primarily for those who have some experience in records management policies and procedures. However, the speaker's approach to the subject ensures that it will not be out of reach for those who are seeking to become familiar with the most recent thinking about recordkeeping requirements as well as the technology available to implement acceptable controls.

## What is ARMA?

ARMA International, the Association for Information Management Professionals, is a not-for-profit association serving more than 10,000 information management professionals in the United States, Canada, and over 30 other nations. The more than 150 Liberty Bell Chapter members include people from most top corporations, professional firms and government agencies in the Greater Philadelphia area.

## CRM Maintenance Credits

Five (5) hours of certification Maintenance Credits are available to all Certified Records Managers.

Award of full credit is dependent upon CRM attendance of the entire event. Attendees must individually request credit.

## Mission:

The mission of ARMA International is to provide education, research, and networking opportunities to information professionals, to enable them to use their skills and experience to leverage the value of records, information, and knowledge as corporate assets and as contributors to organizational success.

Contributions or gifts to the Association of Records Managers and Administrators, Inc. are not deductible as charitable contributions for U.S. federal income tax purposes.

## Extraordinary Value for all registrants!

### Included in cost of Registration:

- Professional Program
- Continental Breakfast
- Morning Beverage Break
- Buffet Luncheon
- Afternoon Beverage Break
- Supplier Exhibits and Demos During Breaks
- Reduced Parking at Indoor Parking Garage at the Hotel
- Within a Few Minutes Walk of Historic Sites (Independence Hall, Liberty Bell, Constitution Center, Betsy Ross House and U.S. Mint.)



**ARMA INTERNATIONAL**  
The Association for Information Management Professionals

Liberty Bell Chapter - ARMA  
c/o Eileen Reader  
1565 Reservoir Avenue  
Roslyn, PA 19001

Address Correction Required

## About the Seminar

Today's records live at the point where three compelling needs intersect. Compliance, litigation and operations pose significant, costly risks to organizations and the officers who oversee them. Records can either mitigate or worsen these risks, so it is no wonder that records management initiatives are front and center for Chief Information Officers, Chief Legal Officers, Chief Financial Officers and others.

This seminar provides in-depth, real-world, practical content on compliance, legal and operations issues affecting public and private sector organizations. It provides an explanation of regulations and new legal rules, discussing how these affect records management. The program examines RIM from different organizational viewpoints and discusses how standards can be of use in resolving differences that arise among IT, Legal, Compliance, RIM and end users.

Attention then turns to exactly how records management program components must be fine-tuned to enable effective electronic records management. The seminar reviews five major records management software products and discusses important differences – such as product architecture – that are not apparent at software demos. The presentation concludes with a ten-step method for implementing electronic records management.

Attendees will receive a copy of all slides used in the presentation to aid in learning and to keep for future reference.

## The Seminar Schedule

7:30 – 8:15	Registration and Continental Breakfast
8:45 – 10:15	Part 1: Compliance
10:15 – 10:30	Break
10:30 – 12:00	Part 2: Litigation & Operations
12:00 – 1:30	Lunch, Exhibits, and Networking
1:30 – 3:15	Part 3: Standards & Fine Tuning
3:15 – 3:30	Break, Exhibits & Networking
3:30 – 5:00	Part 4: Software and Approaches

*A topical outline follows:*

### Morning Session – Parts 1 and 2

- Overview of regulations and requirements
- Impact of regulations on business and government
- Overview of changes to the Federal Rules of Civil Procedure and impact of FRCP changes for RIM, Legal, IT and Others
- Why E-Discovery Projects Aren't Enough
- Why processes are becoming important building blocks for RIM efforts

### Afternoon Session – Parts 3 and 4

- Viewpoints: What do legal, compliance, IT, RM, and end users need and expect from RIM?
- How Can Standards Help?
- What is needed for successful e-RIM? How do components of a records program figure in to managing electronic records?
- How does retention need to change?
- What products are out there?
- The role of risk in an e-records approach
- Ten Steps for E-Records Success

For additional seminar information, contact: **Janice Raphael** at [jraphael@ironmountain.com](mailto:jraphael@ironmountain.com) or **Eileen Reader** at 610-237-7663.

### Accommodations

Please contact the hotel directly to make your reservations:

Holiday Inn-Independence Mall  
Telephone (215) 923-8660

### Parking

Hotel parking is available for attendees at a discount rate of \$8.00 per day. The garage is adjacent to the hotel (left of entrance).

## Directions to Holiday Inn

### From PA Turnpike

- Take Exit 24 (Valley Forge) to Route 76 East.
- Take 76 East to the 676 Exit.
- Take Route 676 East to the 8th Street Exit (Independence Hall).
- Once you exit 676 make a right at the first light.
- At Race Street make a left turn and go two blocks to 4th Street.
- Make a right onto 4th Street and follow for a block and a half.

The hotel entrance will be on the right hand side of the street; the parking garage is to the left of the hotel.

### From the New Jersey Turnpike

- Take the Jersey Turnpike to Exit 4.
- Once you exit take 73 North to 38 West to 30 West.
- Follow Route 30 West to the Benjamin Franklin Bridge.
- Cross the Bridge, take the first exit on the right and follow around the sharp “U” turn to 4th Street.
- Make a right on 4th Street and go two and a half blocks to the hotel.

The hotel entrance will be on the right hand side; the parking garage is on the left hand side of the building.

### From Route I-95 Northbound or Southbound

- Follow I-95 to Exit 17 (Independence Hall/ Historic Area Exit).
- Follow right hand side of the ramp onto Callowhill Street and stay in the left lane.
- Go two lights to 4th Street and make a left.
- Continue for four blocks to the hotel entrance on the right.

The parking garage is on the left hand side of the building.

## Registration Form

Wednesday, February 13, 2008

Please type or print clearly. Duplicate form as needed.

Name \_\_\_\_\_

Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_

Telephone: (     ) \_\_\_\_\_

Fax: (     ) \_\_\_\_\_

E-mail \_\_\_\_\_

**Sorry, we cannot accept credit cards.**

*Registration fee includes continental breakfast, breaks, luncheon, speaker handouts, and reduced parking at hotel garage.*

Current ARMA Member?  Yes  No

Tax ID 23-700-8778

### Registration Fee:

ARMA Member . . . . . \$125

Non-Member . . . . . \$150

Walk-In . . . . . \$175

**Mail registration form(s) and check(s) made payable to Liberty Bell Chapter-ARMA to:**

Liberty Bell Chapter - ARMA  
c/o Eileen Reader  
1565 Reservoir Avenue  
Roslyn, PA 19001

### Cancellations/Substitutions:

If you must cancel your registration, notify us by February 4, 2008 to receive a refund. If you cannot attend, you may send a substitute. “No shows” will be billed.