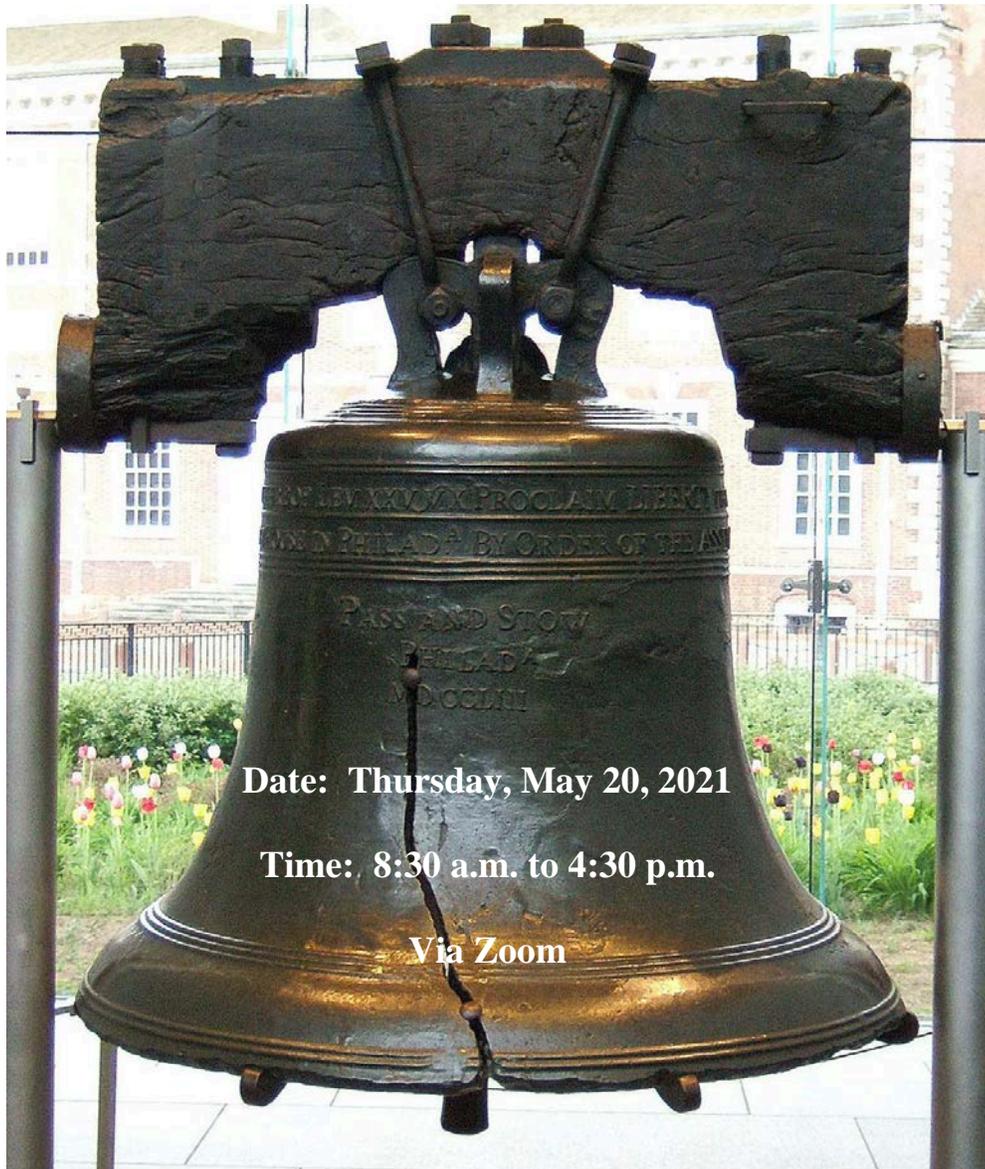


The Liberty Bell Chapter of ARMA Annual Spring Seminar 2021

Records Reset



Liberty Bell Chapter of ARMA

Annual Spring Seminar 2021

Thank you for joining us for the Liberty Bell Chapter's 2021 Annual Spring Seminar!

We have an exciting and educational day planned for you and we hope you enjoy it!

The schedule for the day is located on the next page. Please note that we have arranged several times for you to meet with our event sponsors and we encourage you to take the time to do so as we are grateful for the opportunity to work with them to be able to put on this virtual seminar at no cost to our attendees.

Thank you again for joining us!

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LIBERTY BELL ARMA SEMINAR SCHEDULE

MAY 20, 2021

| Start time | End Time | Topic and Speaker |
|------------|----------|---|
| 8:30 am | 8:45 am | Welcome and Introductions Eileen Reader, Morgan, Lewis & Bockius |
| 8:45 am | 9:00 am | Vendor Introductions |
| 9:00 am | 9:30 am | Keynote James P. Leonard, Esquire Commissioner of Records, City of Philadelphia Department of Records |
| 9:30 am | 10:15 am | Electronic Records Management 101 Ray Davis, Feith Systems |
| 10:15 am | 10:45 am | 30 Minute Break |
| 10:45 am | 11:30 am | The Importance of Incorporating Metadata Taxonomy and Records Management Marc Portner, Innovative Development |
| 11:30 am | 12:30 pm | 1 Hour Break and Lunch |
| 12:30 pm | 1:30 pm | Ethics in Information - Pseudo or Science Michael Haley, MBM, IGP and Megan Sahebjam, J.D., L.L.M., Cohasset |
| 1:30 pm | 2:00 pm | 30 Minute Break |
| 2:00 pm | 2:45 pm | Digital Transformation in a "Post" Covid World Mark Spitz, GRM Information Mgmt Services |
| 2:45 pm | 3:15 pm | 30 Minute Break |
| 3:15 pm | 4:00 pm | Elevating Your RIM or IG Program Through Effective Communications Tod Chernikoff, CRM, IGP, CIP, Navy Federal Credit Union |
| 4:00 pm | 4:30 pm | Wrap Up, Gifts and Thank You Eileen Reader |

SPEAKER PROFILES AND PRESENTATIONS

KEYNOTE ADDRESS - 9:00 to 9:30 am



James P. Leonard, Esquire is a lifelong resident of Philadelphia, who has spent almost his entire career in public service on behalf of the City of Philadelphia. He has served as the Commissioner of the City of Philadelphia Department of Records since April 2016, when he was appointed by Mayor Jim Kenney. As Commissioner, Jim 1) serves as the Recorder of Deeds for Philadelphia, 2) manages the City's records management program for all departments, 3) administers the Department's public access to records program, including the City's historical archives, and 4) oversees the City's printing and binding center and official City photographer. Prior to being appointed Commissioner of Records, Jim practiced law in Pennsylvania for approximately 17 years, with a focus on real estate transactional law, municipal pension matters, and the PA Right-to-Know Law. He spent almost his entire legal career at the City of Philadelphia Law Department. Mr. Leonard received his law degree in 1999 from Villanova University School of Law. He received his Bachelor of Arts Degree in History from Villanova University in 1996.

Records Reset: The Philadelphia City Archives in a Post-Pandemic World

COVID-19 required that the City Archives rethink how it provided services during the pandemic. As we look forward to a post-pandemic world, how will the Archives reengage with the public in even more innovative and thoughtful ways to broaden and deepen its connection to the community at large? Jim will discuss upcoming efforts to digitize major portions of the collection, as well as the Archives' plans for a substantial grant recently awarded by the Pew Center for Arts & Heritage.

TOPIC NO. 1 - 9:30 to 10:15 am



Ray Davis is a Forward-Thinking Records Management, Information Governance, and Strategic Sourcing Professional. Successful at taking ideas from conception to completion utilizing the art of communication, teamwork, and strategic partnerships.

Electronic Records Management 101

TOPIC NO. 2 – 10:45 to 11:30 am



Marc Portner is a Principal Consultant at Innovative Development and leads the eDiscovery/Records Management Center of Excellence. He has been working in this field for over 20 years providing clients with full lifecycle solutions. In addition to providing custom solutions, Marc is a recognized speaker on eDiscovery and Records Management topics and a university instructor on related material.

The Importance of Incorporating Metadata Taxonomy and Records Management

The management of digital content via metadata has become an essential task in the current world of records management. Companies often overlook the importance of architecting a complete metadata taxonomy for their organizations. By examining descriptive, structural, and administrative metadata requirements closely, an organization can create an environment that allows them to work more efficiently. Systems and processes can leverage the metadata structures to simplify the management of digital content.

In this discussion, we will share client examples that show how proper upfront planning can avoid downstream challenges. Additionally, we will share case studies that review examples of poor metadata management and how to avoid those challenges.

TOPIC NO. 3 – 12:30 to 1:30 pm



Michael Haley, MBA, IGP, is a Principal Consultant with Cohasset. Michael joined Cohasset Associates in 2002 as a Senior Consultant, following a career in the insurance industry. During that career, he developed and implemented an enterprise-wide records management program, for over 50 million client files and approximately 1,000,000 boxes of inactive paper records. As a consultant, Michael works with clients to refresh and strengthen their information management programs, assessing current program results, preparing continuous improvement roadmaps and leveraging technology to apply automated retention controls to all information. Michael develops cost-effective and practical solutions, breaking down complex issues to effect simple solutions.



Megan Sahebjam, J.D., LL.M., is a Consultant with Cohasset. Her tenure as a Technology Compliance expert, combined with her JD, and a Masters in Ethics and Compliance, inform her consulting engagements. Megan's multi-dimensional governance background in regulated communications programs and cloud-based communication services deciphers the legal and technological complexities of the current business landscape. An enthusiastic, relationship-oriented professional, Megan thrives on collaboration and active engagement with a variety of business and governance professionals to drive the development of sustainable and compliant information governance programs.

Ethics in Information - Pseudo or Science

What are the ethics of how analytical tools such as Artificial Intelligence, big data and predictive analytics are being used to look for links or relationships across multiple sources of data? These tools are increasingly being used to provide “predictive analyses” for things like establishing a link between cell phone usage and brain cancer, and estimating the likelihood of recidivism as a factor in sentencing guidelines.

But just because we can do these things using analytical tools does not mean we should accept the results of those analytics without first questioning the logic or the algorithms used to generate those results.

Records managers and IG professionals need to think about the ethics of how these analytical tools are developed and used. It is becoming clear that many of these analytics and predictions are potentially tainted with biases because the models on which they are built contain biased information.

As records professionals, we need to protect data not just from hacking or theft, but also protect that data from being misused in ways that can be harmful to individuals, groups and even the society at large. We need mechanisms to help us identify, reduce and/or eliminate potential false conclusions and/or biases that result from analysis of accumulated data, and ask ourselves the question – Is it Pseudo, or is it Science???

TOPIC NO. 4 – 2:00 to 2:45 pm



Mark Spitz. While not the Olympic swimmer himself, Mark is a distant relative and an avid swimmer. Mark possesses over 15 years of experience in Enterprise Content Management Solutions. Mark began his ECM career by working for Datacap (now an IBM Company), a pioneer and industry leader in the Enterprise data and document capture arena. At GRM Information Management Services, Mark serves as the Digital Transformation Expert and Senior Solutions Strategist, providing powerful, cost-efficient solutions to GRM's customers, regardless of where they are in their Digital Transformation journey. Mark works closely with GRM's Account Managers, Sales Personnel, Professional Services staff, and customers and is well versed with the technical challenges and lingo accompanying complex Digital Transformation projects. Mark serves as an excellent resource for explaining technical concepts in layman terms, gaining customer's respect, and serving as the liaison between GRM and their customers. Prior to joining GRM, Mark served as the Director of Automated Software Solutions, a reseller of best-of-breed Document Management, Workflow and Advanced Data Capture solutions. Mark holds a Bachelor's Degree in Information Management Systems from Ramapo College of New Jersey and received the Valedictorian award in his discipline.

Digital Transformation in a "Post" Covid World

- What is Digital Transformation?
- How has Covid impacted Digital Transformation?
- What are the different stages of Digital Transformation?
- What are the essential elements of a Digital Transformation Solution
- What are some of the benefits of Digital Transformation?

TOPIC NO. 5 – 3:15 to 4:00 pm



Tod Chernikoff is a Certified Records Manager, an Information Governance Professional and a Certified Information Professional. He has over twenty years of experience providing records and information management and information governance services to organizations and clients. He has served ARMA International in positions at the local, regional and international levels including as a member of the ARMA International Board of Directors. He received the ICRM's 2014 Alan Andolsen Award in recognition of outstanding CRM Mentorship. He is a member of the Records and Information Management Team at Navy Federal Credit Union where he is helping to enable RIM operations across the global enterprise.

Elevating Your RIM or IG Program Through Effective Communications

What does it take to quickly assess your RIM/IG program and then move it to the next level? This session will provide you with a basis on which to examine many aspects of your program, start conversations with stakeholders and leaders, and find tools to assist you in these efforts.

- Gain a basis for moving your RM/IG program to the next level and find the tools and basis to make this happen
- Identify conversation points around which to bring together your organization's stakeholders
- Identify how your organization's leaders as well as those on the ground floor can support your RM/IG program

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Cohasset Associates, Inc. helps its clients achieve their legal, regulatory and business objectives through the successful management of their information. Drawing on more than forty years of experience, Cohasset provides its clients with innovative advice on managing their electronic information as the digital age creates operational paradigms, complex technical challenges and unprecedented legal issues. Cohasset provides award-winning professional services in four areas: management consulting, education, thought-leadership and legal research.



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DocuVault Delaware Valley is a full service business archive that provides four main services: confidential offsite document storage, secure shredding, document scanning and electronic hardware destruction (laptops, hard drives, towers, etc.). We are the premier full service regional archive in the Delaware Valley, and our local heroic service, superior technology, enhanced security procedures and cost savings separate us from the competition. DocuVault works with clients throughout the Tri-State area to provide them with our “outside the box” approach to records management. Our state-of-the-art Records Center is centrally located in West Deptford, New Jersey and our management team has over 150 years of industry related experience.



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Trusted for more than thirty years, GRM is a leading provider of digital transformation solutions, document management software, scanning and document storage services in a diverse base of industries such as healthcare, government, legal, finance and human resources. GRM's cloud content platform has recently been highlighted in a major independent study for its workflow automation, B2B, and B2C capabilities. It is one of the most complete digital transformation systems on the market.



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Innovative Development delivers a systematic approach to records management procedures to meet legal requirements. This includes identifying, storing, preserving correspondence, communications, and documents for private and public data. Call Innovative Development to establish your records retention schedule, regulatory requirements, legal documentation, and legal hold to prepare for eDiscovery litigation.

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TAB FusionRMS manages the complete lifecycle of both physical and digital records and documents to help you easily find, share and manage your information from creation through disposition while enforcing records management governance. Leveraging 70 years of knowledge with a powerful software solution and consulting services to manage information assets.

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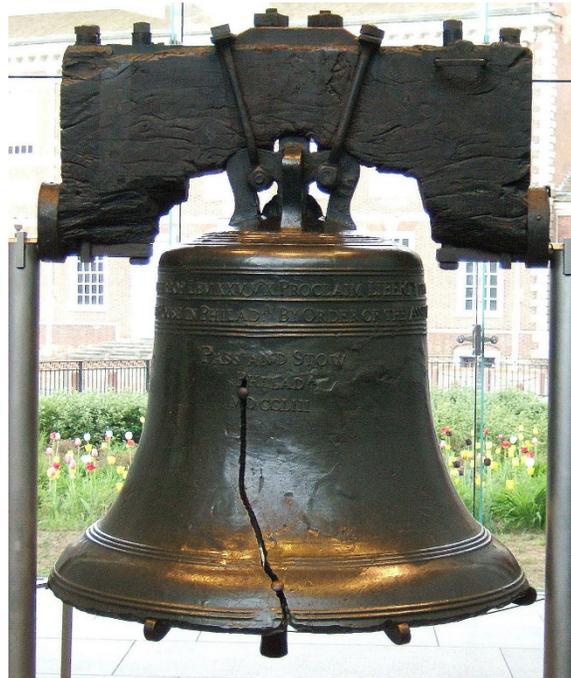
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THE LIBERTY BELL CHAPTER OF ARMA

The Liberty Bell Chapter of ARMA is located in Philadelphia, PA, is a division of the ARMA Mid-Atlantic Region, and is a chapter of ARMA International. ARMA International is a not-for-profit association and the leader in education for Records Management and Information Management Professionals.

<https://www.armalb.org/>