



**Northern Virginia Chapter of ARMA, Intl.**

**Date: February 27, 2009**

*Where history is neighbor to the future.*

**Time: 8:30 AM to 4:30 PM**

*Presents:*  
*Collaborative Techniques and  
Strategies for Records and  
Information Management*



**A seminar covering Collaboration in Records Management - Group Dynamics - Collaborative Taxonomy Development - Open Source Software for Electronic Records Management.**

**Presentations:**

**Collaboration: New Challenges for Electronic Records Management:**

New collaborative toolsets are emerging and existing toolsets are consolidating. Some of the information created through these toolsets will be records. Records and information management (RIM) specialists need to plan for these new record types. Gain a better understanding of human and technology market trends and best practices. Upon completion of this seminar, participants will be able to: 1. Analyze market trends to be able to identify vendor hype. 2. Recognize the unique, technology lifecycle resulting from collaborative technologies. 3. Apply RIM processes to collaboration information.

**Developing a Collaborative Taxonomy:**

Taxonomies may be leveraged at the enterprise level or project level, for navigation or back-end content management, for a portal or for a records management system. Recognition of these variations will impact the type of project necessary, the participants required, and the manner in which the taxonomy should be governed. The methodology for developing the taxonomy should cut across organizational levels and involve all appropriate groups. This collaborative approach ensures not only that the information required to develop the taxonomy is collected but it also educates stakeholders in the process. Conflicting requirements are a given; coordination among the stakeholders must be carried out in order to avoid organic development of the taxonomy, which is generally results in unusable taxonomies. Last, clear management processes, guidelines, and authority are imperative to the ongoing management of the taxonomy.

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**Seminar Site: Information Manufacturing, LLC  
3500 Chain Bridge Road (Rt 123), Fairfax, VA  
(at Jermantown Rd and Rt 123,  
right next to the Rt 123 exit of I-66)  
Ample free parking on site; 3 miles from Vienna Metro**

**Speakers:**

Maurene Caplan Grey is the Founder and Principal Analyst of Grey Consulting. Prior to starting an independent firm, Maurene was Gartner's lead analyst on e-mail, calendaring/scheduling and human communications. She is a contributing author of *Working Collaboratively in an Electronic World* (published by ARMA International, 2007). Maurene was a 2006-2007 Advisory Board Member and Research Fellow of the Society for New Communications Research. She also served as Conference Director for INBOX: The Messaging Event.

Zach Wahl leads the Knowledge Management Practice at Project Performance Corporation, which has helped over 140 public and private organizations successfully implement portals and other knowledge management tools. He specializes in the development of business taxonomies and ontologies and the deployment of Enterprise Information Portals for a variety of organizations including Pratt & Whitney; Columbia University; the Department of Defense (DoD); the International Monetary Fund; and the U.S. Department of Energy (DOE). Mr. Wahl has developed his own taxonomy design methodology, has authored a series of courses on portal knowledge management and development, and is a frequent speaker and trainer on the subjects of eGovernance, portals, and taxonomy design.

Jerry Van Loozen, CDIA+ is a Principal with RIM Resources, LLC. He is a 25 year veteran of Records Management with experience with active filing, archives, document imaging and the development of file plans used in ECM systems. He has served as president three times for ARMA chapters and is a regular speaker at association and universities. He is a passionate leader in the promotion of Open Source Software Solutions for Records and Information Management.

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**Register online at <http://www.armamar.org/nova/programs/seminar2009.htm>**

**ARMA Members: \$100**

**Non-Members: \$150**

**Non-Members who join ARMA: \$75 for seminar plus**

**Annual Membership Dues for ARMA, Intl and NOVA Chapter: \$200**



**Presentations (continued):**

**Open Source Software for ECM and RIM:**

Record Managers need more than ever to be knowledgeable of technology and the tools to manage both physical and electronic records. Open Source software is a development method for software that harnesses the power of distributed peer review and transparency of process. The promise of open source is better quality, higher reliability, more flexibility, lower cost, and an end to predatory vendor lock-in. In this presentation you will learn the history of Open Source software and the current tools and solutions offered for ECM and RIM applications.

**Collaboration: It takes more than technology**

Using personal workplace and consulting experiences, Rick Barry will raise some human- and organization-based prerequisites and other "pre-technology" considerations for collaboration in the workplace, using examples related to information and records management -- organization capacity building through: stakeholder identification and application; policy making; procedures building; and virtual and real organizational integration.

**Speakers (continued):**

Richard E. Barry is a recently retired Arlington-based information management consultant, author, and content manager/editor of MYBESTDOCS.COM, a widely used source of professional and academic information for information on electronic records. He is a founder of the Open Reader Consortium, the aim of which is to provide a non-proprietary, XML-based, open-source reader for long-term access to digital books and documents, including records. Since retiring in 1992 from the World Bank, where he served as chief of office systems and information services (including the Bank's archives and records program), his international consulting and workshop practice has included a number of national archivists and other public and private sector clients. He has served as a project reviewer and advisory board member for the National Historical Publications and Records Commission (NHPRC). He is a member of the Foundation for the National Archives, Society of American Archivists and Computer Professionals for Social Responsibility.

Greg Kinne is a Knowledge Management Consultant with Ventera Corporation. Greg has over 30 years of information technology experience. He has an extensive background in software design, software development and programming, hardware setup and support, and database design and implementation. His emphasis is in knowledge management, document management, workflow, and business process reengineering.

**Seminar Schedule:**

Time Slot	Speaker	Topic
8:30-9:00	Continental Breakfast, Registration and Introductions	
9:00 - 10:30	Maurene Caplan Grey	Collaboration: New Challenges for Electronic Records Management
10:30 – 10:45	Break (Refreshments provided)	
10:45-11:45	Zach Wahl	Developing a Collaborative Taxonomy
11:45-1:00	Lunch (Buffet provided) and Sponsor Introductions	
1:00-2:00	Jerry Van Loozen	Open Source Software for ECM and RIM
2:00-2:15	Break (Refreshments provided)	
2:15-3:30	Rick Barry	Collaboration: It takes more than technology
3:30-4:15	Greg Kinne – Moderator	Panel Session with All Speakers
4:15-4:30	Angela Tayfun	Seminar Wrap Up and Evaluation

**This space reserved for Seminar Sponsors:**

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**Gold (\$500)** Includes table space for promotional brochures, one attendee, 5-minute self introduction during lunch, all seminar advertising, and more.

**Silver (\$250)** Includes one attendee, 5-minute self introduction during lunch, all seminar advertising, and more.

**Details at <http://www.armamar.org/nova/programs/seminar2009.htm>**