



Choo Choo Chatter



Volume 27, Issue 3

The Official Publication of the Greater Chattanooga Area Chapter

January 2014

www.chattanooga-arma.org

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February Meeting

Topic: 5 Steps to a Better Information Governance Future

Date: February 11, 2014

Time: 11:30 – 1:00pm

Registration: Members \$18.00

Location:



Hosted by [Nichole Thomas](#)
Senior Catering Sales Manager
The Chattanooga Hotel & Conference
Center, 1201 South Broad Street,
Chattanooga, TN, p 423-424-3726, f 423-756-
3404, p 800—619-0018
(Click the image to get directions)

RSVP, please email or call [Rhonda Hazlett and Allison Elmore](#) at 423-336-4616.

Please make reservations no later than **February 7, 2014**, by 12:00 pm. *Once reservations have been made and you fail to **cancel by February 7, 2014**, by 2:00pm, you will be responsible for paying the reservation fee. If you are unable to attend, please ask another employee in your organization to attend.

Payment, cash or checks are accepted and payable at the door. Make check payable to: ARMA-Greater Chattanooga Area Chapter or for your convenience use the PayPal button on the [website](#).

Contributions or gifts to our organization are not deductible as charitable contributions for U.S. federal income tax purposes. Membership dues and other payments may be deductible as ordinary necessary business expenses.

COMMITTEE CHAIRPERSONS

- Awards – TBD
- Chapter Foundation Champion – Susan Whitmire, CRM, FAI
- Communications – Rhonda Hazlett
- Education – Heather Shirley
- Hospitality – Rhonda Hazlett
- ICRM Liaison – Gregg Long, CRM
- Newsletter – Mary LaFollette
- Publicity – Scottie Swafford
- Webmaster – Victoria Marshall
- Yearbook/Historian – TBD



The Greater Chattanooga Chapter promotes and recognizes the importance of participation by awarding points to those who support ARMA activities at both the local and the international level. Points are earned by attending meetings, bringing guests, and by serving the Chapter as an officer or committee member. At the June meeting accumulated points are rewarded. The more you participate, the more points you can earn!

Support the Chapter Points

- Attend Workshops 100
- Attend Luncheon Meetings 200
- Attend Dinner Meeting 300
- Bring a Guest 100
- Attend Regional Conf. 400
- Perfect Attendance (Sept-May) 500

Support ARMA International

- Attend Annual Conference 200

Get Creative

- Submit article for newsletter 200
(excludes routine notices, etc.)
- Teach a pre-meeting Education session 200

Get Involved Locally

- Be a Committee Chair 150
- Be a Committee Member 100
- Attend a Board Meeting 100

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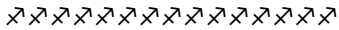
PARTICIPATION STATION

Members Points

MEMBER	POINTS	MEMBER	POINTS
Beene, Phyllis	750	Mullins, Ronald	0
Bostwick, Leanne	0	Parris, Norma	1200
Campbell, Tina	0	Patterson, Gail	0
Culver, Amy	0	Pettway, Robert	0
Elmore, Alison	1050	Powell, Annie	1300
Freeman, Debra	0	Ramachandran, Ravinder	0
Hazlett, Rhonda	1500	Robinson, Sharleen	0
Hooks, Shari	1050	Scoggins, Kelly	200
Jackson, Dennis	200	Shirley, Heather	2050
Johnson, Linda	1400	Stoddard, Catherine	0
Kologek, Ian	200	Swafford, Scottie	950
LaFollette, Mary	550	Tisdell, Kevin	1750
Long, Gregg	2000	Veal, Susan	200
Marshall, Victoria	1550	Whitmire, Susan	800
McEvoy, Laura	200	Wright, Kela	800
Miller, Lorraine	0		

NEWSLETTER ADVERTISING RATES

Business Card Size	\$ 5.00
Quarter Page	\$10.00
Half Page	\$20.00
Full Page	\$40.00

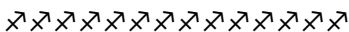


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Mary LaFollette, Editor
423-535-2762

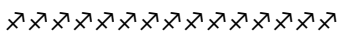
The Information contained in this newsletter does not necessarily reflect the views of the editor, the Chapter membership or ARMA and is offered solely as a source of information. Please direct any inquiries or comments to:

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ARMA Greater Chattanooga Area Chapter
PO Box 341
Chattanooga, TN 37401-0341



Contributions or gifts to the Greater Chattanooga Area Chapter are **NOT** deductible contributions for U.S. Federal tax purposes. Membership dues and other payments may be deductible as ordinary business expenses.

Contributions or gifts to ARMA are **NOT** tax deductible as charitable contributions for U.S. Federal Income Tax purposes.



MEETING & LUNCHEON RATES

Luncheon (members/1 st time visitors)	\$18.00
Luncheon (visitors)	\$20.00
Workshop	\$25.00
Site Visit	\$20.00

PRESIDENT’S MESSAGE

As we begin a new year, I would like to encourage all of our members to attend the exciting Chapter meetings we have coming up for the remainder of the year. We have some great topics in the coming months as well as hosting the ARMA Roadshow.

1. January – Big Buckets vs. Small Buckets: Bill Manago, CRM, Information Governance Solutions, Autonomy with HP Software
2. February – 5 Steps to a Better Information Governance Future: Sofia Empel, MLIS, CRM, IGP, CDIA+ and Emily Empel with InfoCentric Strategies
3. March - ARMA Roadshow – ARMA International is working with our Chapter to host an ARMA Roadshow event on March 12-13. The topic will be “Foundations of Information Management Certificate” and will be held at the Chattanooga. Cost to attend is \$399 for a professional member, regular \$449. There will be some opportunities for some of our members to attend free of charge. More information to be available.
4. April – Navigating the Information Overload: Sheila Green, Green Productivity Solutions

I look forward to seeing you at upcoming events. If you have any suggestions on how to make our Chapter better, please feel free to contact me!

Thanks,

Annie Powell

Greater Chattanooga Area Chapter President



**START PLANNING NOW
TO ATTEND A FUTURE
CONFERENCE:**

**ARMA
INTERNATIONAL
CONFERENCES**

San Diego, CA

TRAINING DEPOT

March 11 – 12, 2014
ARMA Roadshow – Foundations of Information
Management Certificate

April 8, 2014
Navigating the Information Overload

May 13, 2014
TBD

June 10, 2014
Officer Installation & Awards

Member of the Month

Gregg Long, JD CRM

Gregg is a highly organized and meticulous individual who possess a unique combination of legal, organizational, managerial, and technology skills.

Gregg is a contractor for TVA in the Information Representative Records section. There he reviews and updates all content management procedures and work instructions. He is also responsible for the Electronic Content Management (ECM) Project Cross Functional Responsibilities. In his spare time, he also assists the Office of General Counsel Office in matters pertaining to ECM.

Gregg has been involved with records management since 1992 and looks forwards to many more years.

Besides working, Gregg has a love for all things outdoors such as hiking and has completed his first triathlon. Way to go!



IRON MOUNTAIN®

ARMA International
Greater Chattanooga Area Chapter
P O Box 341
Chattanooga TN 37401-0341

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Want to invest in the future of your profession?

Make a contribution.

As an ARMA member.

As a Vendor to the profession.

As an ARMA chapter.

See Susan Whitmire, CRM, FAI, Foundation Chapter Champion, for more details or log on to:

www.armaedfoundation.org

<<<<00000000>>>>

Do you know someone who would benefit from receiving this newsletter?

Send their name, address and e-mail to:

Mary_lafollette@yahoo.com

You are never too old to set another goal or to dream a new dream.

C.S. Lewis

CRM Express

Institute of Certified Records Managers



The Greater Chattanooga Chapter recognizes and supports its candidates in their efforts to achieve the Certified Records Manager (CRM) designation.

The newest Chapter member studying towards the CRM certification:

Laura McEvoy

ICRM 2014 Exam Schedule

Winter Registration

November 22 – January 20, 2014

Parts 1-5, February 3 – 7, 2014

Part 6, February 13, 2014

Spring Registration

February 21 – May 1, 2014

Parts 1-5, May 5 – 9, 2014

Part 6, May 15, 2014

(CRM continued)

2013 PROPOSED REVISIONS TO THE FEDERAL RULES OF CIVIL PROCEDURE (FRCP)

By John Isaza

This is part of a syndicated column I have created for ARMA chapters, including the ICRM Newsletter. My column is devoted to answering information governance, records management and related legal questions from Chapter Members. As you read my responses, please note that although I am an attorney specializing in these areas of law, these are only my opinions based on very limited knowledge of the Member's particular circumstances. My opinions should not be construed as legal advice. Kindly consult with an attorney for more formal advice.

All that said, for the next few editions I will not be responding to any questions, as there is a new *hot topic* to address: the 2013 proposed revisions to the Federal Rules of Civil Procedure (FRCP). The proposed amendments are open for written comment until February 15, 2014, and can be downloaded at: <http://www.uscourts.gov/uscourts/rules/preliminary-draft-proposed-amendments.pdf>.

In my last column, I gave you an overview of the proposed revisions that will affect records managers and other eDiscovery professionals. In this column, I am discussing one of the most significant proposed changes, while commenting on how this will impact RIM and overall information governance. Let's begin with the proposed amendment to Rule 26(b)(1).

The proposed amendment would strike the well-known (bane of any corporation's or lawyer's existence) phrase referring to information "reasonably calculated to lead to the discovery of admissible evidence." For years many of you have heard me talk about how this phrase means that discoverable information is not only evidence that is admissible in court or even directly relevant, but it includes information "*reasonably calculated to lead*" to discoverable evidence. Lawyers have had a field day with this phrase, focusing on "reasonably calculated" to argue for the slightest excuse to go on all kinds of fishing expeditions, all the while costing millions of dollars in discovery costs, not to mention the hours of RIM professionals digging for arguably useless stuff.

Now, with the proposed deletion of this phrase, the proposed amendment focuses only on "any non-privileged matter that is relevant to any party's claim or defense *and* proportional to the needs of the case." (Emphasis added). To this amendment I say hallelujah! According to a recent briefing points bulletin by the Lawyers for Civil Justice, "[t]his change would provide a meaningful improvement compared to the overbroad scope of discovery defined in the current Rule 26(b)(1), which is a fundamental cause of the high costs and burdens of modern discovery."

So how does this impact RIM professionals? Before I respond, let's keep in mind that now more than ever RIM professionals are involved in the e-discovery process. The proposed amendment is designed to curtail the amount of information that has to be produced during discovery. The fishing expeditions, if any, should have a very short leash, so that RIM professionals are not burdened with having to dig up documents and data that are remotely related to a case. This could also mean that countless records subject to legal hold may be candidates for destruction, once the attorneys realize they can lift the litigation holds on all this "stuff." Other proposed amendments (perhaps more controversial) discussed in my next column are further designed to limit the amount of information that is subject to legal holds.

The proposed amendment also moves certain "proportionality" language contained in another part of the FRCP to Rule 26(b)(1). Although this may not appear too earth shattering, it is designed to encourage judges and lawyers to stay pragmatic as to what is discoverable for a particular case. What this means to RIM professionals is that a small case in terms of monetary value or exposure will not command the same attention as the more serious cases. Already some Federal judges like Judge Shira Scheindlin out of the Southern District of New York have voiced concern over this provision. She is concerned that such an instruction will deny smaller plaintiffs, or defendants for that matter, due process. Judge Scheindlin's opinions have some merit, but at least the proposed revisions are forcing a dialogue around a system that is currently broken and fraught with abuse.

Stay tuned for my next column, where I will address the proposed amendment to Rule 37(e) – failure to preserve discoverable information.

John Isaza is a California-based attorney and Partner of RIMON, PC, a twenty-first century law firm that includes specialty in electronic information governance, records management and overall corporate compliance. He may be reached at John.Isaza@RIMonLaw.com or follow him on Twitter and LinkedIn.

Reprinted from the Winter 2013 ProfessioNotes.

Education Junction



What is Predictive Coding?

During the Discovery phase of Litigation, the pressure on Counsel to reduce costs and drive efficiency is ever growing. Fortunately, with the evolution of technology, there is an opportunity to help alleviate some of this stress by utilizing Predictive Coding.

When researching this topic, there were a multitude of definitions, blogs and opinions that were presented on how it worked, why it was successful, what it means for Discovery and Information Governance. One of the clearest explanations of what is actually is can be found below:

- *Predictive Coding is a combination of [machine-learning](#) technology and work flow processes that use keyword search, filtering and sampling to automate portions of an [e-discovery](#) document review. The goal of predictive coding is to reduce the number of irrelevant and non-responsive documents that need to be reviewed manually. The computer [program](#) identifies document properties and refines search parameters according to rules created by humans.(i)*
- *Can be classified as Technology Assisted Review*

Essentially, it does not completely remove the human element from the discovery process but allows you manually review less data which provides greater efficiency in the process. If you would like to read more information on this topic to gain additional perspective on this emerging technology, please see the links below:

- *"[The Grossman-Cormack Glossary of Technology-Assisted Review](#),"<http://www.fclr.org/fclr/articles/html/2010/grossman.pdf>*
- *"What is Predictive Coding? Including eDiscovery Applications"<http://www.kmworld.com/Articles/Editorial/What-Is-.../What-is-Predictive-Coding-Including-eDiscovery-Applications-87108.aspx>*
- *"How Predictive Coding is Revolutionizing the Discovery Process"<http://www.ironmountain.com/Knowledge-Center/Industry-News/Industry-News/H/How-Predictive-Coding-Is-Revolutionizing-the-Discovery-Process.aspx>*

Submitted by: Heather Shirley, Business Development Executive, Iron Mountain

In the News . . .

Email

Can't live without it – especially at work but do you find it hard to manage all those emails? One of the most used email systems is Microsoft Outlook 2010. Outlook provides you with ways to setup and organized your email and calendar.

One of my favorite features in Outlook is the use of rules. Rules allow you to either set them up as organization or notification rules. Rules can help handle and control email. I love how you can decide what criteria is to be used and then set up a rule that takes action on the email that meets the criteria. I use rules to send emails from vendors to specified folders in my file plan. These email stay there until they are auto-deleted in 90 days. 90 days is long enough for me to have read them and moved them into a subject folder if I want to keep the information. Here are some ways to use rules for incoming email:

- ✚ Create a rule for specific senders. Great for customer service areas where it is critical to read email as soon as they come in.
- ✚ Create a rule that looks for particular words in the subject line. I selected the vendor names and have folders where the emails are automatically dropped into the folders.
- ✚ Create a rule that helps you stay up to date in both your business and personal life. If your business allows, you can create a rule that automatically sends an alert to your cell phone when you received a message from a family member.

Another great way to be more efficient in using email is to create contact groups instead of sending individual emails. For example, create a contact group for those areas that you work closely with – sales, management, IS, etc. Not only can you save time when sending email to groups you can also use contact groups for task requests and meeting requests.

Do you have trouble remembering to follow up on a message? Outlook provides flags of various colors that can be tied to reminders. Flag follow up messages using colors and then selecting when to do the follow up, for example, you can select today, tomorrow, this week, next week, no date, or you can even do a custom follow reminders. The great thing about flags is that they are all gathered into a shortcut folder called “Follow Up” – easy to find!

Scheduling meetings with the calendar feature is another effective Outlook tool. One of the features that I like about Outlook 2010 is the Exchange feature “View group schedules”. Once you have created a calendar that shows the schedules of a group of people or resources, Outlook can find the next available day and time that all meeting attendees are available.

Outlook 2010 has a lot more great features that can help you in getting business done and yet stay organized but too many for me to discuss in this limited space.

Submitted by: Mary LaFollette, Editor, Consultant BCBST

Information obtained from: appriver – *How to Organize your Small Business in Microsoft Outlook*

Meeting in Review

This year the Chattanooga ARMA Chapter supported the Candlelighters Organization and the Ronald McDonald House as their Christmas project. President, Annie Powell introduced the members of the Candlelighters Organization. This organization assists families-in-need that have children undergoing cancer treatment. The hospital notifies the Candlelighters of the family-in-need and they reach out to the family to supply not only Christmas presents but will pay utility bills, mortgage payments or whatever the family may need to keep them safe and together so they can concentrate on the health of the child.

A monetary donation went to the Ronald McDonald House to be used as needed in supporting families with various needs. There are so many ways they can use the money; food for the pantry and gifts for Santa's Room where children of all ages can come and pick out gifts from this room over the holidays.

The Chapter once again showed a spirit of giving by providing gifts and money to a family who might not have a means to provide a Christmas for their family because of medical needs that need to be met first.

Submitted by Rhonda Hazlett, Olin Corporation Services

Greater Chattanooga Area Chapter ARMA Board of Directors

Conference Call, Tuesday, November 26, 2013

Committee Reports

Programs: Gregg Long currently working on February and April presentation speakers.

Publicity: Scottie Swafford to update website to include new Board Member names, fix PayPal before next meeting, suggestions have been made to have Kela Wright replace Mary LaFollette as newsletter editor when she retires in March.

ICRM: Gregg Long to check by-laws for CRM change from Lorraine Miller to Gregg Long

Action Items

Directory Pictures: Sent to Shari Hooks.

Chapter guidelines: Ready to be sent out to membership.

Greater Chattanooga Area Chapter Treasury Report

November 2013

Treasurer's Report:

- Money Market	\$2,497.42
- Savings	\$ 25.19
- Checking	<u>\$ 956.83</u>
- Net Assets	\$3,339.34
- Beginning checking balance	\$1,1181.73
- Deposits:	
- 11/12/2013	\$ 259.50
- 11/19/2013	<u>\$ 70.00</u>
- Total Deposits	\$ 329.50

Respectfully submitted,

Victoria Marshall
Treasurer