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PALM BEACH-TREASURE COAST CHAPTER TURNS 30!



On October 30, 2014, the Palm Beach-Treasure Coast Chapter of ARMA celebrated their 30th Anniversary. The formation of this chapter in 1984 gave a more local alternative to Records Managers in Palm Beach and Martin Counties.



“Prior to the Palm Beach Chapter, there was only a chapter in Broward. Attending classes or meetings in that Chapter was not convenient for me” said Diane King, CMC, Assistant City Clerk for the City of Boca Raton.

Ms. King has been a member of the PBTC Chapter for all of its 30 years and is still an active member today. “I have really enjoyed the Palm Beach-Treasure Coast Chapter. The classes that are offered are very helpful and cover so many topics involving records” she said.

The Records industry has seen many changes over the last thirty years. From the paper records and microfilm that many agencies still use today to the dawning of the age of electronic document management, the PBTC Chapter has covered this progression every step of the way in order to help its members stay up-to-date and build careers in Records and Information Management.

“Thirty years ago, Records Manager was a ‘whatever job’. Not really important to a company except when an outside attorney

was requesting a document. Now citizens, businesses, attorneys and other municipalities request documents which you must provide” said Ms. King.

With this increased awareness, the importance of accurate and accessible record-keeping has been headline-making news of late and has brought the Records Manager into the limelight. It is through membership in the PBTC Chapter of ARMA and other industry groups that Diane King and other industry professionals have been able to rise to the occasion and further advance their careers.



*Thank you for
15 years of
service!*



The PBTC Chapter of ARMA would like to salute Josephine Chavez, CRM upon her retirement from the City of Coral Springs. Jo has been an indispensable member of the Board and Chapter. Sometimes, carrying the lion’s share of responsibilities, Jo always fought to keep this chapter afloat despite a variety of challenges along the way. We wish you many happy years in retirement and look forward to seeing you at future events!



CERTIFIED RECORDS MANAGERS (CRM)

The Institute of Certified Records Managers (ICRM) is an international certifying organization of and for professional records and information managers. The ICRM was incorporated in 1975 to meet the requirement to have a standard by which persons involved in records and information management could be measured, accredited and recognized according to criteria of experience and capability established by their peers. National and global industry surveys continue to show a strong correlation and value proposition for those Records and Information Management (RIM) professionals that achieve the CRM designation. The candidate's belief that the credential will provide for enhanced professionalism and personal growth is a significant factor in the overall decision to become a CRM. The RIM knowledge gained through the certification examination preparation process, and elevation of confidence that is achieved as a result of mastering related competencies, is directly related to the CRM's ability to garner higher-level RIM positions with commensurate salaries.

For more information on the CRM designation, visit www.icrm.org

The Palm Beach Treasure Coast Chapter is proud to have nine members that are CRMs.

- | | |
|---|--|
| <ul style="list-style-type: none"> • Jenna Austin, CRM • Jo Chavez CRM • Patricia Franks, CRM • Bill Manago, CRM • Linda Muller, CRM | <ul style="list-style-type: none"> • Michael Padykula, CRM • Mauricio Perry, CRM • Peter Richardson, CRM • Navindra Singh, CRM |
|---|--|

WANT TO BECOME CERTIFIED?

CRM Certification: Learn the benefits and advantages of becoming a Certified Records Manager www.icrm.org OR www.arma.org/r1/professional-development/education/professional-certification/icrm-resources

IGP Certification: Start on the road to become an Information Governance Professional today. www.arma.org/r2/igp-certification

Information Management Certifications: www.arma.org/r1/conferences/roadshow

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TEN STEPS TO FOLLOW IN THE EVENT OF A SECURITY BREACH

Although this issue may seem outside the scope for records managers, our new breed of Information Governance professionals may be called to participate in the response process. I say this because data breaches involve hacking into Records of the organization, which we have a duty to Protect under the Generally Accepted Record-keeping Principles. A hacking incident could trigger a duty to respond to either overseeing agencies, your organization's customers, or your employees. This duty could be triggered not only by a hacking incident, but also by the mere loss of a device such as a laptop or cell phone. As the keeper of the Records and information, today's records manager should be prepared to participate in the below noted process.

Following is a high level summary of ten steps organizations should take in the event of a breach.

- 1. Activate Response Team.** Notify your breach response team. If your organization does not have one, consider establishing a team that consists of executives from legal, IT, security, RIM, human resources, marketing, and finance. This team will be tasked with investigating the incident and taking the other steps noted here.
- 2. Launch Investigation.** Launch an internal investigation to determine the facts and circumstances of the breach. For instance, was the organization hacked or did the potential of a breach occur from the loss of a device. For the latter, consider the following: whose device was it? What kind of encryption did it have? What kind of data did it contain? Has anyone accessed the data?
- 3. Assess Scope.** Have IT or outside forensic experts investigate the potential scope of the breach, and whether any immediate measures can be taken to mitigate further damage. If the breach occurred from hacking, investigation into the nature of the attacker is paramount.
- 4. Assess Need for Law Enforcement.** Determine if law enforcement needs to be called. Some organizations may be nervous about doing this, but in some instances the presence of authorities may extend your organization's deadline for issuing notices to your customers, clients or employees as noted in Step 6.
- 5. Advice Legal Holds Team.** Consult with your legal holds team to determine if the breach is serious enough to warrant a legal hold triggered by potential lawsuits or agency investigations. For Home Depot and Target, the recent hacking incidents may have triggered this duty, given how many millions of people were impacted, and the sensitive nature of the data breach (e.g., credit card numbers).
- 6. Has Duty to Notify Been Triggered?** Determine if the breach triggers a duty to notify overseeing agencies, customers or employees. This is a crucial step in the process, as practically every state imposes some kind of duty to notify in the event of a breach, depending on the nature of the breached data (e.g., financial, health care, social security numbers). If your organization is multi-national, the privacy and data protection requirements of each country where you do business should be vetted. The issue is further complicated by the timing of your actions, which could be more urgent depending on the nature of the breach, the scope, and type of data breached. This is why Steps 1 to 5 are important. Organizations could face severe penalties for failure to report a breach.
- 7. Issuance of Notices.** Issue the notices, if applicable. If they are warranted, they should go out as soon as possible, after conducting your due diligence under Steps 1 to 6. Consider how the notice will be worded, and the requirements of every state or country regarding issuance of your notice.
- 8. Assess Lessons Learned.** Evaluate what happened and determine areas for improvement of security and protection.
- 9. Implement Changes.** Make the necessary changes identified during Step 8.
- 10. Conduct Risk Assessment.** Conduct a comprehensive needs and risk assessment to identify the organization's enterprise-wide security posture. Determine existing risks, which ones to mitigate, which ones to shift to say insurance carriers, and which ones to simply accept as a cost of doing business.

The above noted steps are not one-size fits all, and they are not intended as a one-time process. These steps need to become part of routine processes within the organization, similarly to your legal holds process. The more systematic your approach, the more defensible it will be in the event of a resulting lawsuit or agency investigations into the handling of a particular breach.



ABOUT THE AUTHOR

John Isaza is a California-based attorney, CEO of Information Governance Solutions, LLC and law Partner at 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@InfoGovSolutions.com or John.Isaza@RimonLaw.com. You can also follow him on Twitter and LinkedIn.



*We make a
living by what
we get, but
we make a life
by what we
give.*

**Winston
Churchill**

LOOKING FOR LEADERS!

The Palm Beach-Treasure Coast Chapter of ARMA International is looking for a few of our members to volunteer to join our Chapter Board of Directors. The Board generally meets once a month to discuss chapter business, plan our educational events and brainstorm ways to improve our members' experience.

The PBTC Chapter celebrated our 30th Anniversary on October 30, 2014. For over 30 years, this chapter has been devoted to providing education, offering additional resources and building relationships that will help local Records and Information Management professionals excel in this ever-changing industry. The current industry finds itself in a major transition as it migrates from paper records to electronic records. The information and resources offered by the PBTC Chapter is more important now than ever before! We welcome the addition of a fresh perspective and some new ideas.

The ballot for the 2015-16 Board of Directors will be finalized and sent to our members by mid-May. If you are interested in learning more about the Board or if you would like to volunteer to be included on the ballot, please email the current Chapter President, Queenester Nieves at qnieves@sfwmd.gov ASAP. Please consider joining the PBTC Chapter Board today!



The PBTC Chapter 2014-15 Board of Directors from left to right: Top Row – Ray Worsdale (Treasurer); Middle Row – Mauricio Perry, CRM (Webmaster), Queenester Nieves (President), Mike Padykula, CRM (Director), Daren Hamberger (Vice President); Bottom Row – Laurie VanDoezelaar (Secretary), Jo Chavez, CRM (Director), Megan Hanney (Director) and Linda Muller, CRM (Director); Not Pictured – Bill Manago, CRM (Director)



Palm Beach—Treasure Coast Chapter of ARMA

Presents

STATE OF RECORDS MANAGEMENT ADDRESS

April is RIM Month! To celebrate, Bill Manago, CRM will speak to us on where Records & Information Management is today and where it is going in the future. In this half-day seminar, he will discuss changes to the RIM landscape and how we can continue to stay current while ever-changing technology threatens to redefine our roles and responsibilities, along with our outdated systems!

Can RIM professionals survive in the world of Big Data?

Are you equipped for a seat at the C table where Big Data and Information Governance will be discussed. As IT, Legal, and Risk raises questions and awareness regarding Big Data challenges and issues, can you respond with solutions?



Speaker: Bill Manago, CRM

- Vice President of Information Governance Solutions at HP Software, Big Data Group
- Oversees the functional development of HP’s records and information management systems
- Provides RIM best practices consulting to government, legal and corporate organizations
- Previously employed by the US Department of Defense for 21 years
- Established Joint Interoperability Test Command’s Records Management Certification Test Facility
- Co-authored “Design Criteria Standard for Records Management Applications” (DoD5015.2-STD)
- Leading authority on electronic records management standards and technology

Friday, April 24, 2015

8:30 am — 12:30 pm

Lake Worth Drainage District

13081 Military Trail, Delray Beach, 33484

(561) 498-5363

ARMA Members: FREE

Members: Bring a co-worker for free

Non-Members: \$10.00

(Includes complimentary breakfast)

To Register Visit: www.armacptc.org/Registration.html

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ARMA International Event Calendar www.arma.org/r1/calendar

ARMA Career Center <http://careers.arma.org>

For ARMA Members Only:

Publications, Online Courses and Web Seminars available upon log in at www.arma.org

JOB SEARCH



Finding new employees can be tough. Finding creative and new ways to post your listings can be even harder. Why stress? Let us do it for you.

If you would like for us to post your job opportunities, please submit them to Queenester Nieves at qnieves@sfwmd.gov. For more information go to www.armacbt.org/Employment.html

CALL FOR ARTICLES

Do you or someone you know love to write? Do you have a great idea for an article?

Please submit your finished work to Megan Hanney at mhanney@lwdd.net for inclusion in a future chapter newsletter.



SPONSORSHIP OPPORTUNITIES

Reach your target audience and enhance your participation in the Palm Beach-Treasure Coast Chapter of ARMA International. As a Chapter Sponsor, you will increase your exposure, collect more leads and develop relationships with *practitioners* in the records and information management profession. There is a sponsorship package to fit every budget. Join us today!

Platinum Level – Annual Sponsorship *\$1,000 per year*

- Company logo and hyperlink to sponsor website on www.armacpbtc.org homepage
- Half page ad in Chapter newsletter, *Treasuregram*
- Two seminar attendees to all events (including Annual Conference)
- Vendor space at all events (including Annual Conference)
- Company logo on event flyers and programs

Gold Level – Meeting Sponsorship *\$500 per Annual Conference / \$250 per Seminar*

- Company logo and hyperlink to sponsor website on www.armacpbtc.org as meeting sponsor
- Two seminar attendees to sponsored meeting
- Opportunity to display promotional brochures at sponsored meeting
- Company logo on event flyers, programs and any other meeting advertisement

Silver Level – Advertisers

- **Website:** Company logo and hyperlink to sponsor website on www.armacpbtc.org / *\$250 per month*
- **Newsletter:** Quarter page ad in Chapter newsletter, *Treasuregram* / *\$250 per edition*

Bronze Level – CRM Education Program Donor / *\$100 min. donation*

- Name recognition featured on www.armacpbtc.org and in Chapter newsletter, *Treasuregram*

If you are interested in sponsorship opportunities, please contact Ray Worsdale, Treasurer, at rworsdale@jarden.com or (561) 338-6757. Thank you for your support of the Palm Beach-Treasure Coast Chapter of ARMA!



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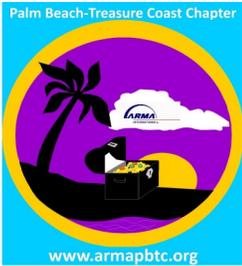
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Are you thinking about joining the Chapter board? Now is the time to let us know! We currently have a vacancy.
Queenester Nieves

FROM THE DESK OF THE PRESIDENT

Greetings to our ARMA family and friends!

We had an extremely eventful and successful past year at the Palm Beach-Treasure Coast Chapter of ARMA with an excellent Annual Conference.

We could not do it without our sponsors. I want to thank Advanced Processing & Imaging (API), HP, MCCI, Recall and RICOH for all the support they have provided during the year, not just this year, but in prior years as well. They have supported our Chapter in so many different ways. We would not be as strong without their continued support.

Much has happened this past year. We have welcomed a new board member, Bill Manago of HP and said goodbye to long-time Board Member, Josephine Chavez of the City of Coral Springs who has retired. Thanks to our members, we are in the black and our chapter is going strong. But we need your input on what you want out of your ARMA membership. We are here to provide educational opportunities to all members.

Are you thinking about joining the Chapter board? Now is the time to let us know! We currently have a vacancy. Being a part of our Board has many opportunities, credits, education and free certification programs. Please contact me with questions or to express your interest.

Queenester Nieves, MBA
President
Palm Beach-Treasure Coast Chapter of ARMA

SAVE THE DATE:

April 24, 2015—*The State of Records Management* April is RIM month!

This half-day seminar will feature current trends and the future of the industry. See enclosed flyer for more information.

May, 15, 2014—*Chapter Board Election Begins*

Chapter Members will receive electronic ballots via SurveyMonkey.com or email. Stay tuned!

October 30, 2015—*Annual Conference*

This day-long conference will feature a variety of speakers, topics and vendors in the RIM industry. Stay tuned for more information.

IN CASE YOU MISSED IT



**PBTC Chapter
2014 Annual
Conference**

*“It’s A Digital
World”*

**Friday,
September 26,
2014**