Welcome to the 2017 Great Lakes & Midwest Rocky Mountain Regions Leadership Conference
Welcome & Introductions

Bill Bradford
Chris Wydman
Why a Region Leadership Conference?

Bill Bradford
Chris Wydman
Tera Ladner, JD, CRM, IGP
Welcome to the new ARMA Intl.

Jocelyn Gunter, CPA, IGP
Tera Ladner, JD, CRM, IGP
What's YOUR elevator speech?
How would you introduce yourself?

Describe what it is that you do?
How would each of you describe ARMA to a potential new member?

What would you say to try to convince the individual to join?
ARMA is the strongest community of professionals in the information management industry with educational resources and networking opportunities here at home and around the world.

It is an exciting time to be in this profession as it is rapidly changing and as a member of the ARMA community you can be part of it. ARMA is shaping the industry and can help you shape your career and add value to your organization.

When it comes to managing an organization’s vital asset, information, ARMA has the most comprehensive approach. We set the standards and best practices that address the full information lifecycle.
Your default role as an ARMA Ambassador
ARMA BOARD OF DIRECTORS

Strategic Board of 10 with 2 outside directors (all volunteers)
Appointed by ARMA Membership
Sets strategic direction with oversight of operations
Ambassadors for ARMA brand and messages

ARMA Headquarters

22 Full time staff
Develops and implements strategies and tactics,
CEO reports success metrics to the board

ARMA REGION ADVISORY BOARD

10 Regions (8 in US, CAN, EU) (all volunteers)
Provide insight to HQ
Support Chapter Leaders and Oversee Chapter Operations
Ambassadors for ARMA brand and messages
Identify new chapter markets

ARMA CHAPTERS

120 Chapters (all volunteer)
Govern, Set Direction, Implement
Enhance education with local focus

Region and Chapter Support
• Region and Chapter Support
• International Strategy
• Government Affairs

Operations and Governance
• HR
• ARMA Board
• Information Technology
• Finance

Sales and Marketing
• Marketing and Branding
• Non-Conference Vendor Sales
• Other Sales Products

Membership and Events
• Membership Development and Retention
• Conference/Event Management
• Region Leadership Conference

Education and Publications
• Education Development
• Information Management Magazine
• Bookstore
• Information Governance Professional Certification
ARMA International is choosing change!
**MEMBERSHIP**
- Students
- Mentors
- New members
- Coordinate recruiting

**TECHNOLOGY**
- New Website
- Share Data
- Boost messages
- Coordinate initiatives, data, resources

**TRAINING**
- Highlight the value
- Leverage ARMA IP
- Volunteer
- Tell us how we can support your local resources

**CHAPTERS**
- Face-to-face
- Identify potential members
- Create the energy in your community
Welcome ARMA Volunteers

This site is designed for ARMA chapter and region volunteers, whose contributions to the organization are indispensable – and greatly appreciated.

Here you will find a wealth of resources and sample items to help you out. Please take a moment to explore this updated site, which contains many new resources.

If the site is missing something, please let us know.

CURRENT EVENTS

- July 1: Email Survey - Watch your email for this
- July 1: You can begin filing 990's which are due November 15th
- July 7-8: Great Northwest & Pacific Region Leadership Conference
- July 7-8: Southeast & Southwest Regional Leadership Conference
- July 21-22: Great Lakes and Midwest Rocky Mountain Leadership Conference
- July 21-22: Mid-Atlantic and Northeast Leadership Conference
- August 1: Chapter Board Update Form is due today!
Re-energize and empower

Engage new communities

Open up new communication channels
**Connected intelligence.**
Join the NEW Arma.

**Elevate your career.**
Join the New Arma.

**Secure your future.**
Join the NEW Arma.

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I am not super-human.
I need help. I need ARMA.

Join the ARMA Movement. With more than $9,700 in value awaiting you, it’s worth the investment in yourself and your career.

Collected intelligence.
ARMA connects you to a community of your peers and industry leaders. More than 10,000 ARMA members in 38 countries that span the globe, and a variety of social networking opportunities allow you to network with and learn from the best in your professional world.

Elevate your career.
ARMA offers educational offerings to help you learn and develop your career. From ICMA courses and live webinars to the annual conference and the online webinars, we are dedicated to helping you stay ahead of your peers.

Secure your future.
ARMA helps you stay ahead of your peers and the industry by providing you with the knowledge and skills to succeed and stay ahead. We also offer education opportunities and exclusive membership benefits, including 10% off of your 2022 ICMA registration.

Join ARMA and receive a $50 Amazon Gift Card. Take advantage of this limited time offer today.
We need YOU!

Your representation
Your leadership
Your participation
Your networking – Bring a colleague or a friend!

Agents of Change
ARMA LIVE! ORLANDO
OCTOBER 15-17 | MARRIOTT WORLD CENTER | ORLANDO, FL
Step Out!
Reach Out!
Grow ARMA Together!
2017

Break
Training for Chapter Board Positions

Education & Programming: Kathy Nielsen & James Zimmerlin, CA, CRM

Membership & Marketing: Kamal Kapoor, MBA & Dynessa Nordrum, CRM, CDIA+, CIP

Operations & Governance: Paula Sutton, CRM, IGP

Presidents: Bill Bradford & Chris Wydman
Lunch
Chapter Innovation
Case Study

Mile High Chapter
2017

Break
Break
2017

Break
Region Meetings

Bill Bradford
Chris Wydman
End Day 1
Welcome Back to Day 2 of Region Leadership!
What’s New from ARMA HQ

Heather Lehman, CAE
Presentation from AIEF
INVEST IN YOUR PROFESSION

Presented by
Mike Smith and Donald Force
With **Your** Support, the Foundation gives back to the information management community.

► **Our Vision** is to be the leading foundation that enhances the practical and scholarly knowledge of information management.

► **Our Mission** is to fund and promote research, scholarship, and educational opportunities for the information management profession.

► **Strategic Goals:** The Foundation concentrates its funding and promotional activities in three areas:

1. Supports research to address critical issues in information management
2. Provides funding opportunities to enhance knowledge, skills and abilities of practitioners in the field
3. Fosters educational initiatives that develop information management skills and programs
Great Lakes/Rocky Mtns

Jennifer Baranski
Cori Brock
Jeanne Callen
Ekaterina Elgayeva
Laurie L Gingrich
Miriely Guerrero
Linnea Knapp
Catherine Lucy
Denise Pickett
Valerie Raiche
Sofia Scalzitti
Jack Wilcox

$16,250
1

SCHOLARSHIPS AND TUITION REIMBURSEMENTS

$202,000 over ten years
Graduate Scholarships Awarded

- 52 awards over 10 years
- $152,000 awarded
- Graduate programs across the U.S. and Canada
WHERE ARE THEY NOW?

Graduate Awardees

► Susan Duis Haigh (2013) now Deputy City Clerk, City of Bonney Lake

► Chad Doran (2014) now Enterprise Records Manager, Johns Hopkins Applied Physics Lab

► Sherry Xie (2007) now Professor, School of Information Resource Management, iSchool at Renmin University, China
College Reimbursement

- $27,000 total (2014-2016)
  - Chapters across the U.S.
  - All RIM professionals
- 3 awards of $1,000
- Sponsored by Access
  “Access Leadership Scholars Program”
  - 3 awards of $2,000
  - 3 awards of $6,000

Professional Development

- $23,000 total (2014-2016)
- CRM exams
- RIM training
- IG certifications
- Conference attendance
- 31 people, nationwide
WHERE ARE THEY FROM?

Access Scholars
Each received assistance for college while working

> Ruben Vargas – Arizona
> Lisa Padilla – Houston
> Jessica Harman – Tulsa
> Susan Wheeler – Louisiana
> Ashley Shimer – Virginia
> Judi Long – South Florida

Why not someone from your Region?
2 RESEARCH
RESEARCH PROJECTS

- 25 Research Projects Completed

- Online Directory/Searchable Database of English Language Collegiate RIM Courses, updated annually

- All available for free download or use at:

  www armaedfoundation.org
## Bachelors – United States

### Collegiate Directory Navigation

- Collegiate Directory
- Associates – Australia
- Associates – Canada
- Associates – Online
- Associates – South Africa
- Associates – United Kingdom
- Associates – United States
- Bachelors – Australia
- Bachelors – Bahamas

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Current Research

▶ **U.S. Current Court Cases** (in process) – will gather recent, important and relevant IG/RIM orders and opinions issued by the Courts since 1994, updating an earlier publication that addresses pre-1994.


▶ **Social Media Systems Records and Information Governance Challenges** (2015)

Download at no charge from: [www.armaedfoundation.org](http://www.armaedfoundation.org)
SUPPORTING THE PROFESSION
HOW CAN YOU HELP?

Remember, this is your profession and your Foundation!!

► Become at **Chapter Foundation Champion** – the person in each Chapter who serves as a liaison to and representative of the Foundation to your Chapter Board and to Chapter members

► Set up a **monthly, recurring donation** to the Foundation

► **Talk up** the Foundations programs to your colleagues and friends

► **Volunteer** for the Foundation Board of Trustees or serve on a Foundation Committee (Scholarships, Research, Fundraising, Marketing, Finance,…)
How can your Chapter support the Foundation?

► Encourage your members to apply for Tuition Reimbursement
► Fund a specific project of interest to your Chapter through the Foundation’s Research Program
► Add a donation to the Foundation to your Chapter’s Annual Budget
► Contribute Speakers’ Fees
► Donate In Memory of a colleague
► Sell Raffle Tickets, hold 50/50 events in your Chapter
Are you Ready?

HOW WILL YOU AND YOUR CHAPTER/REGION DECIDE TO GIVE BACK TO MOVE THE PROFESSION FORWARD??
2017

Break
Mind the Gap & SWOT

Bill Bradford
Chris Wydman
2017

Lunch on Your Own
ARMA STRATEGIC PLANNING

How we achieve success

Chrissy Bagby
A strategic planning method for creating an agile and flexible strategic plan.

Prevents the creation of a plan that sits on a shelf and gathers dust.

Goals are re-validated each year and adjusted as necessary to address rapid change.

Long term planning is designed into the goals but 3-5 year plans are not used.
GOST Strategic Planning Method

2017

**Goals:** The larger outcome(s) you are trying to achieve.

**Objectives:** Measurements that must be achieved to attain the goal

**Strategies:** The general path(s) to get to your goals

**Tactics:** A series of specific, smaller tasks that make up the strategy
**Goal:** Provide an exceptional membership experience.

**Objective:** Improve first year retention rates to an average of 45% by 7/1/18

**Strategy:** Create a personalized, localized, energized and friction-free experience

**Tactic:** Design and implement new member welcome strategy
As the authority on RIM and a leader in IG, our goals are to:

1. Employ progressive and sustainable technologies
2. Provide an exceptional membership experience
3. Improve the satisfaction and success of Regions and Chapters
4. Increase the size and engagement of membership
5. Increase visibility and influence of ARMA
6. Pursue professional opportunities for ARMA members
7. Internal Efficiencies
8. Financial Stability and Growth
GOST Takeaways

1. Process should not take more than a half day, probably less.
2. Involve your board and other key volunteers.
3. Start with G’ and work your way down the pyramid.
4. You will likely have multiple goals, probably between 3 and 5.
5. GOST drives all work performed by the organization.
6. GOST can be modified mid-stream to address the reality of change.
7. Annual review of “G’s” is necessary. Usually, they don’t all change. However, underlying “O’s, S’s, and T’s do change.
8. O’s have to be measurable but logic tests are acceptable as measurements.
9. Responsibilities made at the strategy level; assignments at the tactical level.
10. Share results and progress with membership and ask for their assistance.
What will your Chapter Takeaway?
2017

Break
Continuation of Chapter Report Discussion
Wrap Up

Bill Bradford
Chris Wydman
Tera Ladner, JD, CRM, IGP