



2017

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



2017

Welcome & Introductions

*Bill Bradford
Chris Wydman*



2017

Why a Region Leadership Conference?

Bill Bradford

Chris Wydman

Tera Ladner, JD, CRM, IGP



www.arma.org

Welcome to the *new* ARMA Intl.

Jocelyn Gunter, CPA, IGP

Tera Ladner, JD, CRM, IGP

Information Governance

Recordkeeping

RIM

Analyst

Networking

Metrics

Information Management

Data

Education

Manage

Meta Data

Member

Privacy

IG

Compliance

Technology

Records Management

Documents

Records

Regulation

Cybersecurity

Thought Leadership

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.

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.

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.

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](#).

ARMAVOLUNTEERS

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.



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

As a manager, I manage a team of 10. It's not the number of people I manage that's important. It's the number of people I manage that are as good as I am. After all, it's not the number of people I manage that's important. It's the number of people I manage that are as good as I am. After all, it's not the number of people I manage that's important. It's the number of people I manage that are as good as I am.

JOIN ARMA TODAY



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.

As an ARMA member, you are invited to a global community of your peers and leading thinkers. 12 are there, 111,000 are not. ARMA's speakers, risk and members that span the globe, a variety of social networks, and a vast non-networking capital that allow you to save with and learn. Your first investment in your professional intelligence.



Elevate your career.

ARMA's online education of 100+ provides a massive amount of skills and knowledge that is not available elsewhere. ARMA's online education of 100+ provides a massive amount of skills and knowledge that is not available elsewhere. ARMA's online education of 100+ provides a massive amount of skills and knowledge that is not available elsewhere.



Secure your future.

ARMA's online education of 100+ provides a massive amount of skills and knowledge that is not available elsewhere. ARMA's online education of 100+ provides a massive amount of skills and knowledge that is not available elsewhere. ARMA's online education of 100+ provides a massive amount of skills and knowledge that is not available elsewhere.

**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!

A large circular graphic on the right side of the slide. It features a central circle with a gradient from light blue at the top to orange and yellow at the bottom, resembling a sunset or sunrise over a horizon. Surrounding this central circle are several concentric rings of curved arrows pointing clockwise. The background of the entire slide is a dark blue with a pattern of lighter blue and white geometric shapes, including lines and squares, creating a sense of movement and technology.

life begins
at the end of your
COMFORT
ZONE

Neale Donald Walsch



2017

Break



2017

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



2017

Lunch

2017

Chapter Innovation Case Study

Mile High Chapter



2017

Break

2017

Recruiting

*Kamal Kapoor, MBA
Dynessa Nordrum, CRM, CDIA+, CIP*



2017

Break



2017

Technology & Your Chapter

St Louis Chapter

www.arma.org



2017

Break



2017

Region Meetings

*Bill Bradford
Chris Wydman*

www.arma.org

2017

End Day 1



2017

Welcome Back to Day 2 of
Region Leadership!



2017

What's New from ARMA HQ

Heather Lehman, CAE



2017

Presentation from AIEF

Mike Smith
Donald Force

www.arma.org

INVEST IN YOUR PROFESSION



Presented by
Mike Smith and Donald Force



ARMA INTERNATIONAL
**EDUCATIONAL
FOUNDATION**
RESEARCH • EDUCATION • SCHOLARSHIP

This is YOUR Foundation



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



▶ **\$16,250**

- ▶ 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

1

SCHOLARSHIPS AND TUITION REIMBURSEMENTS

\$202,000 over ten years

SCHOLARSHIPS



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 Remnin University, China

TUITION REIMBURSEMENT



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?**

A solid green square, approximately 216x251 pixels, serving as a background for the number 2.

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

Show entries

Search:

College	City	Region	Contact	Degree	Degree Type	Residency
Arizona State University	Tempe	Arizona	email	Bachelors	Bachelors Degree in Informatics	Residential Only
Faulkner University	Montgomery	Alabama	email	Bachelors	Bachelors Degree in Informatics	Residential Program
Indiana University	Kokomo	Indiana	email	Bachelors	Bachelors Degree in Informatics	Residential Only
Long Island	Brookville	New York	email	Bachelors	Bachelors of	Residential Only

Collegiate Directory Navigation

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

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
- ▶ ***Information Governance and Public Engagement: How U.S. Federal Department Policies Are Addressing Social Media Records*** (2016)
- ▶ ***Social Media Systems Records and Information Governance Challenges*** (2015)

Download at no charge from: **www.armaedfoundation.org**



3

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,...)

CHAPTER SUPPORT



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??



ARMA INTERNATIONAL
**EDUCATIONAL
FOUNDATION**
RESEARCH • EDUCATION • SCHOLARSHIP



2017

Finding Speakers

Kathy Nielsen
James Zimmerlin, CA, CRM



2017

Break

2017

Mind the Gap & SWOT

Bill Bradford
Chris Wydman



2017

Lunch on Your Own



2017

ARMA STRATEGIC PLANNING

How we achieve success

Chrissy Bagby

www.arma.org

GOST: Goals, Objectives, Strategies and Tactics

- ❖ 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.

2017

GOST Strategic Planning Method



G

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



O

Objectives: Measurements that must be achieved to attain the goal



S

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



T

Tactics: A series of specific, smaller tasks that make up the strategy

2017

ARMA GOST Example



G

Goal: Provide an exceptional membership experience.



O

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



S

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



T

Tactic: Design and implement new member welcome strategy

2017

ARMA Goals

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*

2017

GOST Takeaways

Key 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.



2017 YOUR RLC Takeaways

What will your Chapter
Takeaway?



2017

Chapter Successes

*Bill Bradford
Chris Wydman*

www.arma.org

2017

Break

2017

Continuation of Chapter Report Discussion

*Bill Bradford
Chris Wydman*



2017

Wrap Up

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