ARMA Utah-Salt Lake Chapter

ARMA INTERNATIONAL

ARMA-Utah Salt Lake Spring Seminar 2015
March 19, 2015

$60 for Members
$70 for Non-members
CRM Points: 5, CIP Points: 5

Theme: Information Governance: To RIM and Beyond

8:00 am	Breakfast and Registration
8:30 am	Welcome and Cornerstone Spotlight
9:00 am	Session 1: Joe Shepley
10:15 am	Break and Vendor Visit Time
10:45 am	Session 2: Stephen Chan
12:00 pm	Lunch
1:15 pm	Session 3: Gordy Hoke
2:30 pm	Break and Vendor Visit Time
3:00 pm	Session 4: Craig Young
4:15 pm	Networking

Register Online at ARMAUtah.org

Salt Lake Community College
Miller Campus
3-MFEC – 203 Multi Purpose
9750 South 300 West, Sandy, UT 84070

Contact: Howard Loos
Howard_Loos@byu.edu
801-228-8326

Speakers:

Joe Shepley
Doculabs- Keynote
"Where is Information Governance Headed and What Do Records Managers Need to do to Be Prepared?"

Stephen Chan
ProofPoint
"Case Studies from Industry and a New Approach to Proactive Information Governance for Shared Drives, Desktops and Email…"

Gordy Hoke
Duff & Phelps - RIM and IT
"Approaches for Working Together to Address Electronic Records"

Craig Young
DoxTek
"The Generally Accepted Recordkeeping Principles and Information Governance"

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If you are interested in becoming a member, you can apply online at ARMA.org. Questions about becoming a member, please contact Jim Gault at JamesGault@NationWideShelving.com or 801-755-6737.

ARMA-Utah Salt Lake Spring Seminar 2015
Information Governance: To RIM and Beyond

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9750 South 300 West, Sandy, UT 84070

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*CIP points = 5

Salt Lake Community College Miller Campus
Directional Map & Campus Directory
9750 South 300 West
Sandy, Utah
(801) 957-5200

Miller Campus Directory

*CART   Culinary Arts Center
Cafeteria/Food Services
Banquet Rooms
*DPS   Department of Public Safety
Classrooms
Dorms
Firing Range
KGMC   Karen Gail Miller Conference Center
Conference Center
MATC   Miller Automotive Training Center
Automotive
SLCC Institute of Public Safety
MCPC   Miller Corporate Partnership Center
Continuing & Community Education
Miller Business Innovation Center
PacifiCorp
Utah Small Business Development Center
MFEC   Miller Free Enterprise Center
ACT Testing Center
Auditorium
Corporate Training
Faculty/Student Support Office
Program & Course Development
Supported Employment
UHP/Emissions
MPDC   Miller Professional Development Center
Finance Office
Conferencing Services
Distance Education
Enrollment Services
* Not Official Names

Driving from The North:
Take I-15 South to Exit 295 (9000 South). Exit right (west) onto 9000 South and proceed to 450 west (1st light). Turn left (south), go to 9120 South & turn left (east), go to 300 West (frontage road) & turn right (south). Proceed 6 blocks south along frontage road.
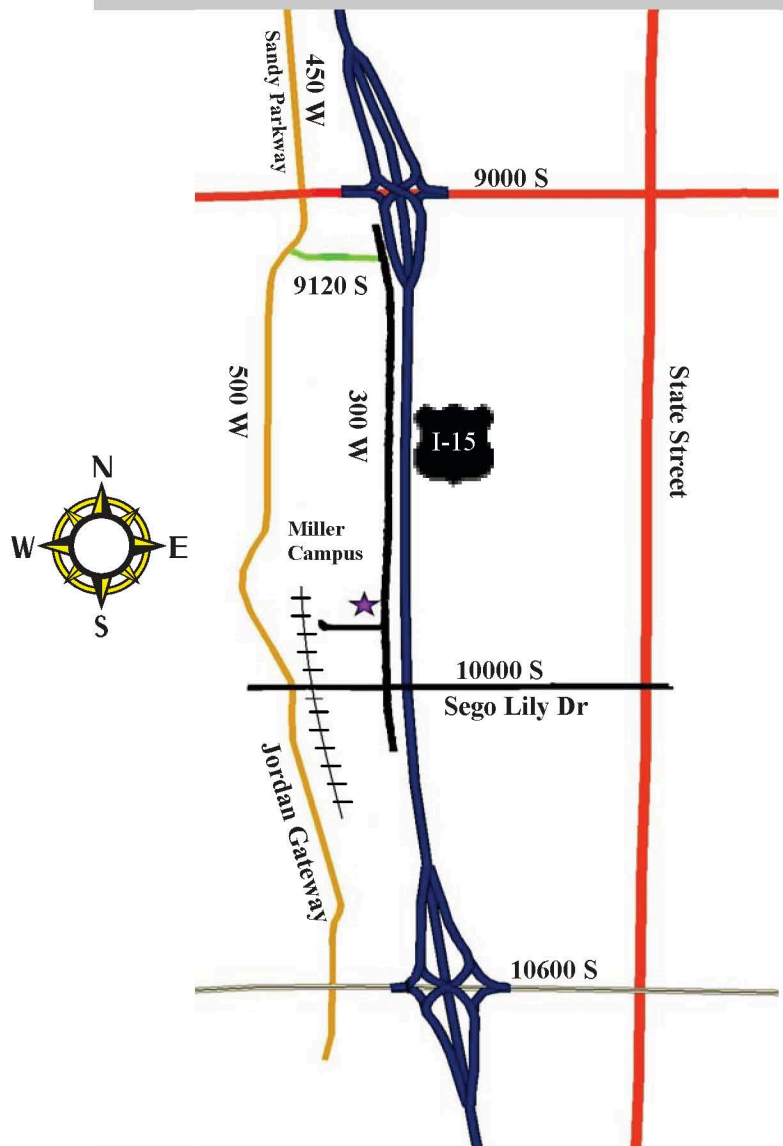
Driving from the South:
Take I-15 North to Exit 293 (10600 South) after exiting, turn left (west) and proceed to Jordan Gateway. Turn right (north), go to light at 10000 South (Sego Lily Dr) in Sandy. Turn right (East), go over the railroad tracks & turn left (north) on 300 West (frontage road). Proceed 2 blocks north along frontage road.

Session 1 (Keynote) – 9:00 AM

"Where Is Information Governance Headed and What Do Records Managers Need to Do to Be Prepared?"

Presented by Joe Shepley, PhD

It goes without saying that Records Management as a profession has been undergoing profound transformations in the last five years, from desktop to mobile, from on premises to the cloud, from enterprise software to software as a service, and from centralized control to BYOD and app store models for IT delivery. But perhaps the most profound is the transformation within its own borders, from managing records to governing information. This shift acknowledges the fact that, as the folks charged with managing core corporate information, records managers are uniquely placed to help their organizations leverage information more effectively and with less risk. But to do so, records managers will need to develop new skills and ways of working, or risk getting left behind in the basement with the boxes. In this keynote, you'll hear what Doculabs believes records managers need to do to make this transition successfully and how to avoid pitfalls and worst practices that can hold them back.

Joe Shepley, PhD, has been involved in information management for 15 years, both as a business person and, for the last 7 years, as a consultant at Doculabs, where he is currently Vice President and Practice Leader. He has worked with organizations across all industries, but currently runs Doculabs' energy, life science, healthcare, and manufacturing practices. He is a frequent speaker at industry events (AIIM, ARMA, EFM, EMC, OpenText, IBM, KnowedgeLake) and a prolific author on information management, both for his own blog (Agile Ramblings) as well as a range of industry publications (CMSWire, Oil and Gas Monitor, PCWorld, Fierce Content Management, ASPETraining, AIIM). He also chairs the content management track of the DOCUMENT Strategy Forum, the premier conference for information management leaders across industries.
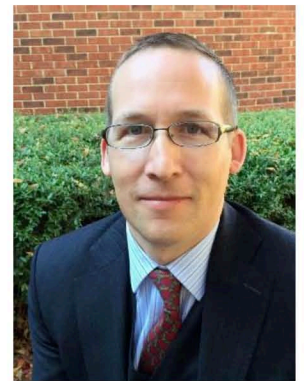
Session 2 – 10:45 AM

"Trends in Industry and a New Approach to Proactive Information Governance for Shared Drives, Desktops and Email…"

Presented by Stephen Chan, Proofpoint

Stephen leads products for the Information Governance team at Proofpoint. Successfully merging 15 years of expertise in the areas of e-discovery, compliance, and records management together with their most relevant technologies, Stephen drives thought leadership in the industry and has advised the SEC and Global 1,000 organizations. Prior to Proofpoint, Stephen was co-founder of several enterprise and consumer software firms and served as primary investigator on two government funded research projects. Stephen is a graduate of the University of California at Davis and Harvard University.
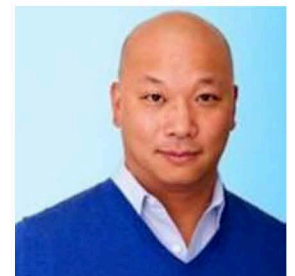
Session 3 – 1:15 PM

"RIM and IT – Approaches for Working Together to Address Electronic Records"

Presented by Gordy Hoke, CRM – Duff & Phelps

The days of separation – or worse – competition between records, IT and Legal are over. A key success factor is the synergy we can harness. That's important, because no one area is sufficient by itself. Each has a major contribution to make toward an organization's success. But working together is difficult, especially when each area has a different perspective, values, budget-scope, and vocabulary. This session will present ways to find synergy, including structure, policy, and operations.

Gordon E.J. Hoke, CRM, IGP, is Vice President in Information Governance for Duff & Phelps. Previously, he was Manager of Electronic Records for Abbott Laboratories. His career has evolved through document management, content management, records management, and, now, information governance. He has over 300 author credits and presents internationally. He blogs at www.PositivelyRIM.blogspot.com. Write to him at Gordon.hoke@duff&phelps.com.

Session 4 – 3:00 PM

 "The Generally Accepted Recordkeeping Principles ® and Information Governance"

Presented by Craig Young, CRM – DoxTek

Like you, Craig Young has various professional and life experiences that enrich his expertise in the field of Information Governance. Craig started his professional career as a computer programmer. He has supervised computer operations and computer support groups. Craig has been a Regulatory Analyst with responsibilities in Records Management, Cyber Security and Homeland Security. He is no stranger to regulatory requirements and compliance. Craig was a Project Manager responsible for implementation of an Enterprise Content Management (ECM) system.

Craig is currently a Business Analyst at DoxTek, a document technology and solutions provider with headquarters in Orem, Utah. His responsibilities are centered on supporting Project Engineers with business process analysis, documentation, and implementation of solutions for DoxTek clients. Craig's introduction to Records Management occurred in 2004 when he attended his first ARMA Conference in Long Beach, California. It was love at first session, and the affair continues today. Craig enjoys his association with local ARMA chapter members where he has served as Membership Chair for two terms, on Conference Planning Committees and has presented at local Chapter meetings and seminars. He was awarded the ARMA-Utah Salt Lake Chapter Member of the Year award in 2007. He obtained his CRM certification in January, 2013. He is a CRM mentor and CRM exam Part 6 grader.

In this session, Craig will moderate a workshop to emphasize the importance of The Generally Accepted Recordkeeping Principles ® and Information Governance. Using data from real life examples, attendees will identify problems that have occurred in information management systems and records management policies (or lack thereof). Discussion points will include: What is the problem, what is the root cause, which Records Management Principle is not being followed, and how the problem can be corrected. Attendees will be encouraged to actively participate and, as a group, share ideas and propose solutions. Emphasis will be focused on solutions that do not require capital expenditures and tasks attendees can begin to work on as soon as they return to work.

The Utah-Salt Lake Chapter of ARMA would like to say THANK YOU to the following sponsors for participating in this seminar:

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Upcoming Events

"Accessing Public Records and GRAMA" – Rosemary Cundiff

Date: February 19
Time: 11:45am-1:00pm
Location: Utah State Archives, Training Room, 346 South Rio Grande Street, Salt Lake City

"What is "The Cloud" and Why Should a Records Manager Care?" – DoxTek Cloud Specialist and Craig J. Young, CRM

Date: April 16
Time: 11:45am-1:00pm
Location: Odgen City Council Chambers, Ogden

"Building a RIM Program: Successful Approaches and Challenges" – Todd Johnson, CRM

Date: May 21
Time: 11:45am-1:00pm
Location: Questar

"Closing Social and Awards"

Date: June 18
Time: TBD
Location: TBD

Are You Already a Member of ARMA- Utah?

The Utah- Salt Lake Chapter of ARMA International is dedicated to serving its members through networking opportunities, continuing education, ARMA International pamphlets and technical publications, and notices of upcoming meetings.

The Chapter holds monthly meetings which provide educational and professional leadership in the Records and Information Management field.

Utah- Salt Lake members foster the development of professionalism through the ARMA Code of Ethics, the setting of professional standards of business conduct, commitment to helping members, and a pledge to continue professional and technical education.

To learn more about ARMA-Utah and ARMA International or to become a member, go to these sites or contact us:

http://armautah.org

http://arma.org

contactarmautah@gmail.com

A heartfelt THANK YOU to those who made this event possible!

SEMINAR COMMITTEE

Chair: Howard Loos

Co-Chair: Joshua Bullough

Members: Susan Mumford

Mindy Spring

Ryan Stock

Jann Tingey

Notes: