

UNVEILING THE FUTURE OF INFORMATION

NAVIGATING THE DIGITAL LANDSCAPE AND EMERGING
TECHNOLOGIES



2024 Spring Seminar
March 21st | 8am-3pm

Thank you for joining us at the ARMA Utah 2024 Hybrid Spring Seminar! We are very grateful for our amazing committee members and for our presenters and sponsors.

If you are joining us virtually and are experiencing technical difficulties, contact Haley Dunkley: haley_dunkley@byu.edu or text 801.400.0195.

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SEMINAR SCHEDULE

TIME	FORMAT & TOPIC	PRESENTER(S)
Morning Session: Current and Future Technologies Shaping Information		
8 - 8:30am	Breakfast/Registration	
8:30 - 9am	WELCOME & VENDOR SPOTLIGHTS	
9 - 9:50am	Keynote: AI and the Future of Information Governance	Joe Shepley <i>PhD, CIPP/US, Managing Director, Alvarez & Marsal</i>
9:50 - 10:05am	BREAK/NETWORKING	
Mid-Morning Session: Challenges in the Digital Landscape		
10:05 - 10:50am	Presenter: Both Tech & RIM are continually evolving, how are you adapting to match?	Gabrielle Harris <i>RP, CIPP/E, CIPP/US, CIPM, MSML CES Privacy Officer, CES Privacy Center</i>
10:50 - 11:40am	Panel: Digital Dilemmas: Challenges in the Ever-Evolving Digital Landscape	David Fleming (Moderator) <i>VP and Records Manager, Zions Bancorp</i> Gabrielle Harris <i>CES PQ, CPC</i> Todd Johnson <i>VP, Merrick Bank</i> Tyler Thorsted <i>Digital Preservation Manager, BYU</i>
11:40 am - 1pm	LUNCH	
Afternoon Session: Risk and Compliance in the Digital Era		
1 - 1:45pm	Case Study: Scattered Contracts - Gathering and Governing Dispersed Records	Victor Moxley <i>JD, Associate, PwC - Legal Business Solutions</i>
1:45 - 2pm	BREAK/NETWORKING	
2 - 2:50pm	Endnote: Navigating the Sea of Microsoft 365: Drowning, Treading Water, or Sailing Forward?	Philip Favro <i>JD, Principal Consultant, Innovative Driven</i>
2:50pm - 3pm	CLOSING REMARKS/ANNOUNCEMENTS	

OUR PRESENTERS



David Fleming (CRM, IGP) is Vice President and Corporate Records Program Manager for Zions Bancorporation and has over 35 years of experience in operations management, project management, records management and information governance. In the role of Corporate Records Program Manager, David works closely with

executive and business unit management, Data Governance, Legal, and IT to develop information management and legal discovery strategy and processes for the corporation. David is an active member of the ARMA Utah-Salt Lake Chapter and has served in various ARMA leadership roles at the chapter and region levels including Chapter President and Pacific Region Director and participates as a mentor in the ARMA mentorship program. He has also previously served in volunteer leadership roles for the American Bankers Association (ABA) Records Management Working Group and as a member of the Utah State Records Committee from 2011 to 2019 (Chair 2017-2019).



Gabrielle Harris (FIP, CIPP/E, CIPP/US, CIPM, MSML) is currently CES Privacy Officer for the CES Privacy Center at Brigham Young University, working with the other CES institutions such as Ensign College and BYU-Idaho. She has a diverse background ranging from being a Systems Analyst to Finance Accountant, but her heart truly belongs to Privacy! Through the International Association of Privacy Professionals (IAPP), she has earned several ANSI-accredited credentials and the designation of Fellow of Information Privacy (FIP). Gabrielle also has a Bachelor of Science in Geography and a Master of Science in Management and Leadership, both of which have led her to a love of looking at topics through a global and human lens. Data Privacy and Protection principles take that passion to new heights as she is able to really promote best practices around safeguarding individuals' personal data and examining the complexities of regulations around the world. When she is not overloading on Privacy, she has an extreme love for football, music, art, and doing advocacy work in the community. She is really excited to connect, collaborate, and partner with the SLC chapter of ARMA at this event!



Joe Shepley (PhD, CIPP/US) is a Managing Director with Alvarez & Marsal Disputes and Investigations in Chicago. He specializes in information governance and data privacy. His primary areas of concentration are records and information management and data minimization. With more

than 20 years of information governance experience, Joe has performed RIM assessments, program modernization, benchmarking and large scale data cleanup. He has helped organizations design and implement successful information governance programs, with a focus on meeting the retention and disposal requirements of U.S. and global regulations, such as California's CPRA, the GDPR in the E.U. and NYDFS 500.13.



Philip Favro (JD) is a leading expert on issues relating to the discovery of electronically stored information. Phil serves as a court-appointed special master, expert witness, and trusted advisor to law firms and organizations on matters involving electronic discovery and ESI. He regularly

provides training to judges, and is a nationally recognized scholar, on electronic discovery and ESI, with courts and academic journals citing his articles. He is a licensed attorney who in private practice represented organizations and individuals in litigation across the spectrum of business disputes. In addition to handling a range of complex and other discovery issues, Phil has extensive experience in the courtroom including summary judgment, preliminary injunction, and discovery motion practice, together with trial and arbitration experience.



Todd Johnson (CRM, IGP, CIP, ERMm) has worked in increasingly complex areas of records management, information governance, and compliance over the last 18 years. He is currently the VP for Information Security Risk and Compliance at Merrick Bank.



Tyler Thorsted is the Digital Preservation Manager for the Harold B. Lee Library at Brigham Young University. With over 11 years of experience in the field, Tyler previously worked with the Church History Department for the Church of Jesus Christ of Latter-day Saints in Salt Lake City. He holds a degree in Technology

Management from Utah Valley University, where he gained valuable experience working for commercial printers in Utah. Tyler resides in Orem with his wife of 23 years and their two children.



Victor Moxley (JD) is an experienced associate at the Legal Business Solutions practice of PricewaterhouseCoopers (PwC), advising clients on legal, tax, and compliance operations, technology, and automation. Victor applies his JD/MPH from BYU to legal and quantitative analysis by utilizing technologies to

enable compliance with policies that advance health, safety, and equity. His Bachelors of Science in Statistics included coursework in machine learning, data validation, and quality improvement programs. Victor has implemented and overseen legal compliance technologies as a healthcare administrator, in state and local government, records management, educational institutions, and financial institutions. His legal education includes information privacy, corporate compliance, electronic discovery, and professional ethics.

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*Thank You for Joining Us!!
We hope to see you again
next month!*

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