

Instructions for Completing a Proposal

- Review this document and the requested proposal topics **before** submitting the proposal.
- Proposals can only be submitted at the direct request of or by the primary facilitator teaching the education program.
- Complete and submit the proposal by **COB February 8**, **2016**. Once finalized, proposals can still be modified until the submission deadline.
- Proposals must include all requested information in the format required. Incomplete proposals will not be reviewed.
- Prepare your information before visiting the online submission form. Keep a copy of your submission for your records.

Notification

You will be notified of the Conference Proposal Review Group's (CPRG's) decision no later than April 30, 2016. If your proposal is accepted, you will be required to:

- Submit the final copy of your learning materials (PowerPoint, handouts, etc.) no later than July 29, 2016.
- Agree NOT to market products or services during your program.

Honoraria, Travel Expenses, and Complimentary Registration

Because ARMA International is a not-for-profit educational association, facilitators must cover all of their individual travel and living expenses. A \$500 discount toward their registration fee is provided to each conference education program facilitator. Facilitators may register for more than the discounted registration amount at their own expense or register for the expo at no cost.

A \$500 honorarium is provided to the primary facilitator for half-day pre-conference seminars, while a \$1,000.00 honorarium is provided to the primary facilitator for a one-day pre-conference seminar, and \$2,000.00 is provided for a two-day seminar. Facilitators of only pre-conference seminars will not receive a discount toward their conference registration.

Commercial presentations may be delivered by exhibitors and sponsors of our annual expo. For information on exhibiting and on these speaking and presentation opportunities, contact Paula Banes, exposition manager, at 913.217.6023 or conference@armaintl.org.

General Information about the Event

About ARMA International

ARMA International is a not-for-profit professional association and the preeminent global authority on managing records and information – paper and electronic – and on information governance. Since its establishment in 1955, the association has grown to more than 27,000 members, including records and information managers, information governance professionals, archivists, corporate librarians, imaging specialists, legal professionals, IT managers, consultants, and educators, all of whom work in a wide variety of industries, including government, legal, health care, financial services, and petroleum in the United States, Canada, and more than 30 other countries.

Target Audience

Average conference and expo attendance exceeds 3,000 from numerous professional backgrounds and levels from all around the world! The attendees represent more than 30 countries and 1250 organizations. Participants come from all types of organizations, including government, education, and corporate sectors, representing all levels of the organization from managers and consultants to CIOs.



Criteria for Acceptance

ARMA International Education Policies and Procedures

ARMA International education programs are non-commercial. Individuals should refrain from using brand names and endorsing specific products. Under no circumstance should an association podium be used as a place for direct promotion of a facilitator's product, service, or monetary self-interest. Facilitators also must refrain from overt statements, harsh language, or pointed humor that disparages the rightful dignity and social equity of any individual or group.

Selection Criteria

The selection process follows a rigorous review of every proposal submitted. Incomplete proposals will not be reviewed.

Education programs should demonstrate measurable impact and results. Your emphasis should be on the application of the concept or solution presented, using simulations, exercises, and tools that enhance the learning experience. Participants want real-world examples of what works and practical take-away tools and solutions.

Proposals of a commercial nature, those that promote or market particular products and services, will not be considered

All proposals are reviewed with the following criteria:

Quality of Content

- Completeness, responsiveness, and appearance of the proposal (incomplete proposals will not be reviewed)
- Well-defined, results-oriented learning objectives that can be met in the time allotted
- Content that is challenging, in-depth, practical, or cutting-edge and oriented towards management of records and the governing of information
- Innovative and new approaches to current and emerging issues
- Offer or include performance improvement tools or job aids
- Relevance to the program topics that we've requested

Facilitator Qualifications

- Professional experience and background of the facilitator(s) as evidenced by time in the profession, current position, and contributions to the industry
- Expertise in topic areas and demonstrated interactive teaching skills as evidenced by evaluations and recommendations

Limit for Number of Facilitators

Programs are limited to three facilitators, and facilitated dialogue/buzz sessions are limited to three experts plus one moderator for a total of four facilitators. Exceptions to these limits must be approved by ARMA International.

Facilitators are limited to delivering two education programs. Facilitators may serve in a facilitated dialogue/buzz session in addition to delivering two education programs.



Proposal Information

Proposal Type/Format

ARMA International offers six distinct formats in which to share knowledge and experience that will facilitate participant learning. Select the format that will most accommodate your content and engage and enlighten your audience with practical job application.

- ARMA Flipped! Sessions consist of two sessions: one provides the content instruction in an online format
 and the other provides a practical, hands-on application of the online content instruction in a follow-up, faceto-face format. Flipped learning works well with "how to" content and increases attendee retention and recall
 for better application on the job. ***Complete the steps below with the content details for the follow-up, faceto-face session that will take place at conference.***
- Facilitated Dialogue/Buzz Sessions consist of a moderator and up to three experts who discuss a variety of perspectives on a given topic. Participants contribute their ideas regarding how to address an issue or react to the information that has been presented in the session.
- Learning Labs/Works in Progress are 90 minutes long and designed to provide in-depth learning and high interactivity where attendees can develop their skills while engaging with peers, all under the direction of experts. The sessions feature case studies and works in progress that introduce attendees to new, dynamic approaches. The sessions must have at least 45 minutes set aside for discussion and application.
- Rapid Fire Sessions cover a broad range of subjects, from innovative or novel IG or RIM practice approaches, to current trends, state-of-the-art technologies, or professional development topics. They provide "meaty" content and consist of timed 10-minute talks that can be grouped under a related topic.
- Other Formats are sessions that consist of unique and engaging formats that might be out-of-the-box configuration, a new experience by which adults learn, or a stand-and-deliver approach. You must fully describe the format and explain why it best suits your content.
- **Pre-Conference Seminars** are half-day, one-day, or two-day programs that provide a unique opportunity for in-depth study of the latest topics in specialized fields related to records management and information governance.

Proposal Submission Steps

On the Conference Proposal Submission site, remember to click "**Save**" at the bottom of each step (or tab) before moving on to (or clicking) the next step. Any unsaved data will not be included in your submission.

1. Title

The title of the submission should reflect the topic. **Titles are to be no more than 8 words.** Do not use abbreviations or acronyms that would be unfamiliar to the audience; and do not use trademarks.

2. Primary Facilitator

Programs are limited to three facilitators, and facilitated dialogue/buzz sessions are limited to three experts plus one moderator for a total of four facilitators. Exceptions to these limits must be approved by ARMA International.

Name: State/Province:
Organization or Institution: Zip/Postal Code:
Job Title: Country:
Street Address: Phone Number:
City: Email Address:

Primary Facilitator's Biography (75 words maximum)

Highlight your professional and educational experience and accomplishments relevant to the topic of the education offering. Do not describe company products or services. Your entry will be edited for style, spelling, and grammar. We will only use terminal academic titles (Ph.D., Ed.D., Esq., J.D., M.D.) and the IGP, CRM, AAA, CRM/NS, CA, CDIA, CDIA+, CEDS, CGEIT, CIA, CIP, CIPP, CISA, CMC, CQA, ICP, MMC, MSA, PMP, and FAI designations. Below is a sample biography.





Jane Smith, IGP, CRM, has 25 years of experience in records and information management. Her specialties are records management strategy development, business process reviews, and the creation/use of international and national standards for records and information management. Before XYZ Company, she was XXX International's director of professional development, where she established the Standards Development Program. She has worked in a variety of industries and is a 2010 recipient of the ARMA International Distinguished Service Award.

State/Province:

Email Address:

Country: Phone Number:

Zip/Postal Code:

Co-Facilitator(s)

Name: Organization or Institution:

Job Title: Street Address:

City:

Co-Facilitator's Biography

Apply the same guidelines as for the primary facilitator's biography.

3. Description

Using no more than 75 words, provide a concise description of your proposed education offering.

- Describe the issue or problem it will focus on, and how it will address the problem.
- Outline the value of the education offering to participants (what's in it for me?).
- Reflect the title and learning objectives and explain what is unique or new about the information.

The description should **not** be an editorial on the topic or an advertisement for the facilitator or the topic. Please write in the second person (you) and avoid references to the facilitator and his/her published work by title.

4. Learning Objectives

Briefly state three to four specific, measurable, and action-oriented learning objectives that complete the following sentence: "Upon completing this session, participants will be able to..."

Tips for Writing Effective Learning Objectives

- 1. Write learning objectives from the perspective of the learner (not your presentation objectives or goals).
- 2. Make objectives action-oriented or results-oriented, using leading words like *apply, analyze, discuss, develop, examine, explore, identify, recognize*, etc.
- 3. **Avoid** passive, non-measureable words like *learn*, *understand*, and *know*.
- 4. Answer this question to help you craft your objectives: What will the learner be able to do after taking part in the education offering? (For example: "**Develop** a records retention schedule" and not "Understand a records retention schedule.")
- 5. Make sure you can deliver on the objectives you choose!

5. Job Aids / Tools

Participants expect to receive practical solutions and job aids they can use on the job. What takeaways will you provide in your education program? This is a **critical component** of your proposal. Your PowerPoint slides are **not** considered job aids or takeaways.

Here are examples of what could be included in your proposal as a job aid.

- Is it a Policy, a Standard, a Guideline or a Procedure? (diagram/decision matrix)
- A toolkit for approaching data creation strategically
- A dataflow-type questionnaire, with answers at one level leading to the next appropriate questions



6. Categories

Instructional Delivery Methods

How are you going to relay this information to the participants? What instructional methods (group discussion, demonstration, round table, case study, etc.) do you plan to use? A number of factors determine the delivery format you select, such as the purpose, objectives, and outcomes; the number of participants; the facility setup; the available equipment; and the budget.

- **Buzz Sessions** divide a large group into subgroups of 3 or 6 participants to consider a specific, limited problem or questions for 3 to 8 minutes. The small size of the subgroup allows each group member to participate; the short time frame requires groups to work hard and stay on target.
- Case Studies work well for situation-specific issues and problems. They provide an account of an actual problem or situation an individual or group has experienced and ask the basic question, "What would you do?" It's an effective method for generating controversy and debate on issues for which definite conclusions do not exist.
- **Demonstration** is effective as long as it is directed at specific learner outcomes. It is best used to illustrate or explain a specific skill or procedure by modeling how to perform practices or procedures.
- **Lecture with Discussion** should allow time after the presentation for the participants to ask questions or offer comments.
- Facilitated Discussion works well for policy issues and debates. Multiple experts facilitate dialogue
 among themselves and with the audience from a variety of perspectives. Participants contribute their
 experiences and thoughts.
- **Problem Solving** lets participants solve a problem through the collection, application, and assessment of information. It's an effective way to encourage participants to inquire into, and think critically about, a topic. Groups define the problem, identify solutions, seek data to solve, formulate and test solutions, and choose a solution.
- **Roundtable Discussion** is facilitated to initiate specific discussions. Groups discuss information, issues, problems, or questions. Often each group is given its own unique topic.
- **Small Group Discussion** encourages participation among all learners. It can be utilized in a lecture format. The format requires thoughtful planning but is easy to implement, even in large sessions. The facilitator poses questions or problems to the audience and asks them to join in discussions with those around them.
- Other includes unique and engaging methods, such as an out-of-the-box configuration or a new experience by which adults learn.

Program Length:

Determine the appropriate length of time required to accomplish the learning objectives, but without extra time to deviate from the objectives. Select the length of time from the options provided.

Skill Level:

Choose from these options the level of experience or skill required for participation in your education program. ARMA conference education is divided into three levels:

- **Core:** Education for those who are new to the profession; are in entry-level positions; or are practitioners from other disciplines and domains, such as IT, legal, compliance, and risk. You will acquire core principles and expand upon foundational knowledge and skills of information management.
- Management: Education for seasoned practitioners who have some level of hands-on, prior experience; possess significant knowledge of information management practices and information governance concepts; manage or develop projects and staff; or possess extensive knowledge in other business domains. You will establish or expand upon the application of information management and governance principles to your operations or discipline.
- **Strategic:** Education with a strategic focus for high-level experts, such as executives, senior business managers, legal counsel, technology architects, and compliance officers. You will be able to provide enterprise direction to management, information management staff, and end users with a focus on business strategy, change management, IG policies, collaborations, and partnerships.



Education Thread:

ARMA conference education is divided into six threads of content. Identify the primary education thread for your program content.

- Information Risk and Compliance: Education on activities that proactively mitigate and manage the potential for damage to or loss of records and information-related risks, such as risk analysis; risk assessment; business continuity; disaster preparedness and recovery; researching and monitoring legal, regulatory, and industry-specific compliance requirements; creating and monitoring internal policies and procedures; and implementing methods for measuring and monitoring effectiveness of the plan.
- Strategic Planning and Framework: Education that centers on developing a strategic plan that demonstrates an in-depth understanding of the organization's information, business goals, corporate culture, financial resources and commitments, and on establishing the parameters of the organization's information management and governance efforts, including developing policies and standards; defining the authority, roles, and responsibilities; designing program communications and training; and developing audit and enforcement mechanisms to ensure the program can be measured, controlled, and improved.
- Establishing a RIM and/or IG Program: Education that revolves around the program scope and goals, such as identifying specific program components; acquiring a mandate from executive leadership; establishing reporting requirements; assigning specific roles and responsibilities; establishing specific program metrics and desired outcomes; and implementing and managing the program for accurate and readily available information.
- Business Integration and Oversight: Education that focuses on administering, implementing, or
 maintaining the functions an organization performs; aligning the information management and governance
 strategy and programs to enhance business goals, needs, and objectives; working closely with business
 units to determine steps for implementing the program; and monitoring and auditing the program to confirm
 compliance with changing laws and that the program does not impede the business goals.
- Aligning Technology with a Framework: Education that includes developing, maintaining, and using
 information processing systems and software applications; supporting hardware and networks for the
 processing and distribution of data, and extends beyond to partnering with IT leadership regarding the
 organization's technology landscape; the ways technology is used by the business; how to align the
 information management, governance, and technology teams' strategies and operations; evaluating
 technology trends that affect information; and partnering with IT to assess opportunities and threats.
- Training and/or Managing Stakeholders: Education that pertains to motivating groups of people to
 achieve program goals within the context of the organization's overall goals; positively influencing, guiding,
 motivating, and mentoring others through empathy and sensitivity; managing change and building buy-in;
 developing inroads in communication across the organization; and keeping stakeholders engaged,
 involved, and developed professionally.

Champion Stakeholder:

Review the stakeholder list and select the champion stakeholder for the content in this proposal.

- Business & Audit: Responsible for proper information management and governance to reduce risk and bring value to the organization; appropriate information practices to help the organization become more competitive and compliant in the face of 21st-century information challenges; etc.
- Information Technology: Responsible for electronic records management to address challenges of
 emerging technologies; tools and resources that can position the organization to meet information
 management and governance requirements using legally defensible technology; etc.
- **Legal:** Responsible for best practices and the laws and regulations that affect activities, such as litigation, discovery, organizational compliance; etc.
- **Privacy:** Responsible for principles and practices within the rapidly evolving field of privacy and data protection; privacy laws, regulations, and the protection of information within and across products, services, and borders to demonstrate effective information management and governance; etc.
- Records & Information Management: Responsible for systematic management of records and
 information as the foundation of sound information governance; standards, best practices, and the
 Principles to help move the professional and the organization forward; etc.



7. Other

Please provide additional information about yourself and the education program.

Additional Info:

- 1. What interactivity will be provided within the instructional delivery of this program? What is unique or new about the format that will be used for this program? (Participants prefer some degree of interaction with the facilitator and/or the group in order to ensure learning and explore application.)
- 2. Would you like to share this proposal with ARMA region & chapter leadership to be considered for local programing?
- 3. Have you taught this program before? If yes, to whom?
- 4. **Do you have previous facilitation experience? If yes, when and where?** (Include event, topic/title, date, and location for two prior experiences.)
- 5. **Please provide two references** per facilitator if you are a first-time facilitator at this conference. These references should be directly related to your knowledge of the subject and your facilitation skills and experience. (Include name, affiliation, e-mail address, and phone number for each reference.)

ARMA Flipped! Online Session: (if applicable)

The previous steps in this proposal should be completed with the content details for the follow-up, face-to-face session that will take place at conference.

The form below should be completed with the content details for the initial instruction that will be delivered to attendees in a 45-minute, online session prior to conference.

- 1. Title for Online Session:
- 2. Description for Online Session:
- 3. Learning Objective #1 for Online Session:
- 4. Learning Objective #2 for Online Session:
- 5. Learning Objective #3 for Online Session:
- 6. Learning Objective #4 for Online Session:

8. Preview

Are you prepared to finalize and officially submit this proposal? Please take a few minutes to review your proposal prior to completing your submission.

9. Finalize

Once finalized, your proposal can still be modified until the submission deadline of COB February 8, 2016.

Please note that proposals will not be considered or reviewed if they are not finalized.