



### Instructions for Completing a Submission

- Review this document and the requested topics **before** submitting.
- Proposals can **only** be submitted at the direct request of or by the **primary facilitator** teaching the education program. Recommendations can be submitted by anyone.
- Complete and submit the recommendation or proposal by **midnight (Central time) February 6, 2017**. Once finalized, submissions can still be modified until the submission deadline.
- Submissions must include all requested information in the format required. **Incomplete submissions 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 Education Management Group's (CEMG) decision no later than April 30, 2017.

If your proposal is accepted, you will be required to:

- Submit the final copy of your learning materials (PowerPoint, handouts, etc.) no later than **August 18, 2017**.
- Agree NOT to market products and/or services during your program.

### Honoraria, Travel Expenses, and Complimentary Registration

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

**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](mailto:conference@armaintl.org).

## General Information about the Event

### About ARMA International

ARMA International is a not-for-profit professional association and the authority on governing information as a strategic asset. The association was established in 1955. Its members include 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, healthcare, financial services, and petroleum in the United States, Canada, and more than 30 other countries around the globe.

### Target Audience

Average conference and expo attendance exceeds 2,500 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. This does not apply to expo-related sessions. 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 finalized submission. Incomplete submissions 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 submissions are reviewed with the following criteria:

##### Quality of Content

- Completeness, responsiveness, and appearance of the submission (incomplete submissions 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 managing and governing information assets
- Innovative and new approaches to current and emerging issues
- Offer or include performance improvement tools or job aids
- Relevance to the requested program topics

##### 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 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 as an expert in a buzz session or as a pre-conference facilitator in addition to delivering two education programs.



### Submission Information

#### Submission Type/Format

ARMA International offers several distinct formats in which to share knowledge and experience that will facilitate participant learning. Over the next several years, ARMA International's annual conference will become an experiential learning event with little to no lecture-based sessions. *Therefore, priority consideration is given to sessions that are engaging and interactive in nature.*

Select the format that will most accommodate your content and engage and enlighten your audience with practical job application.

- **Recommendations** provide you an opportunity to nominate exceptional facilitators you've seen or sessions you've attended for consideration as part of the conference program. Help us find the best of the best of those who might not submit a proposal on their own!
- **ARMA Flipped! Sessions** consist of two sessions: the first provides the content instruction in an online format prior to conference and the second provides a practical, hands-on application of the online content instruction in a follow-up, face-to-face format at conference. Flipped learning works especially 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, face-to-face session that will take place at conference.\*\*\**
- **Buzz Sessions** consist of a moderator and up to three experts who discuss a variety of perspectives on a given topic. Participants also contribute their ideas regarding how to address an issue or react to the information that has been shared in the session.
- **Learning Labs** are 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 and must allow at least 50% of the session time for attendee discussion and/or application.
- **Rapid Fire Sessions** cover a broad range of subjects and provide short bursts of "meaty" content to attendees. They 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 managing and governing information assets.

#### Submission Steps

On the Conference 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.

Not all steps will be relevant to every format. This document lists all possible steps, but the site will guide you through those relevant to your selected format.

#### 1. Title

The title of the proposal or recommendation 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 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:**  
**Organization or Institution:**

**Job Title:**  
**Street Address:**



**City:**  
**State/Province:**  
**Zip/Postal Code:**

**Country:**  
**Phone Number:**  
**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.*

**Co-Facilitator(s)**

**Name:**  
**Organization or Institution:**  
**Job Title:**  
**Street Address:**  
**City:**

**State/Province:**  
**Zip/Postal Code:**  
**Country:**  
**Phone Number:**  
**Email Address:**

**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 (WIIFM: 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, etc.*
3. **Avoid** passive, non-measurable 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 threads of content. Identify the primary education thread for your program content.

- **Accountability & Compliance:** Education around overseeing an information governance program, ensuring appropriate individuals manage information, and adopting organizational policies and procedures to guide personnel and ensure program audits; as well as constructing and managing such programs to comply with applicable laws, binding authorities, and organizational policies.
- **Integrity & Transparency:** Education centered on structuring information governance and management programs to suitably guarantee generating and managing authentic and reliable organizational information assets; as well as documenting organizational business processes and activities and making documentation available to personnel and stakeholders.
- **Availability & Protection:** Education focused on maintaining information assets in a manner that ensures their timely, efficient, and accurate retrieval when needed; as well as protecting information assets that are private, confidential, privileged, secret, classified, essential to business, or otherwise require protection.
- **Retention & Disposition:** Education that addresses maintaining organizational information assets for an appropriate time, taking into account their legal, regulatory, fiscal, operational, and historical requirements; as well as securely and appropriately disposing of information assets no longer required to be maintained by applicable laws and organizational policies.

### 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: (if applicable)

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 programming?**
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.)

**Recommendations:** (if applicable)

1. **How do you know about this facilitator and/or session?**
2. **When you participated with this facilitator and/or session, what did you enjoy most about your experience?**
3. **Why do you think this facilitator and/or session should be included in the annual conference education program?**
4. **What will the attendees/participants get out of a session like this or with this facilitator?**
5. **Who (what type of professional) will benefit the most from a session like this or with this facilitator?**
6. **If this facilitator and/or session is chosen to be included in the annual conference education program, can we use your name when we reach out to solicit them/it for conference?**
7. **What other information should we know as we consider this facilitator and/or session for inclusion?**

**ARMA Flipped! Online Pre-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 Pre-Session:**
2. **Description for Online Pre-Session:**
3. **Learning Objective #1 for Online Pre-Session:**
4. **Learning Objective #2 for Online Pre-Session:**
5. **Learning Objective #3 for Online Pre-Session:**
6. **Learning Objective #4 for Online Pre-Session:**

#### 8. **Preview**

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

#### 9. **Finalize**

Once finalized, your recommendation or proposal can still be modified until the submission deadline of midnight (Central time) February 6, 2017.

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