



## Instructions for Completing a Proposal

- Proposals can **only** be submitted **by the primary facilitator teaching the education program**. **Third-party submissions will not be reviewed.**
- Review the requested proposal topics. *(Proposals for topics outside this programmatic framework will only be considered if the content substantially supports the overall program.)*
- Review the instructions for completing a proposal **before** submitting.
- Complete and submit the online form by COB October 30, 2009.
- Proposals must include all requested information in the format required.
- 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 Program Committee's decision no later than January 31, 2010.

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

- Submit final copy of your learning materials (PowerPoint, handouts, etc.) no later than September 1, 2010.
- Agree NOT to market products/services during your course.

### Honoraria, Travel Expenses & Complimentary Registration

As a not-for-profit educational association, ARMA International facilitators must cover all of their individual travel and living expenses. The option of a \$350.00 honoraria or one complimentary registration for a 1.5-hour session is provided to the primary facilitator only. Three-hour sessions are provided a \$600.00 honoraria or two complimentary conference registrations for the primary facilitator and one co-facilitator. Additional facilitators may register for the full conference at their own expense or receive an Expo Pass, which will provide admission to their session and to the Expo floor.

A \$1,000 honorarium is provided to the primary facilitator for a one-day pre-conference seminar and \$2000 is provided for a two-day seminar.

## Personal Information

### 1. Facilitator

<b>Name:</b>	<b>Street Address:</b>
<b>ARMA Member ID:</b>	<b>City:</b>
<b>Designation:</b>	<b>State/Province:</b>
<b>Organization or Institution:</b>	<b>Zip/Postal Code:</b>
<b>Job Title</b>	<b>Country:</b>
<b>Email Address:</b>	<b>Phone Number:</b>
	<b>Fax Number:</b>

### Co-Facilitator

**Name:**  
**Email Address:**

### 2. Facilitator's Biography (75 words or less)

*This should highlight professional and educational experience and accomplishments relevant to the topic of the education offering. It should not describe company products or services. Your entry will be edited for style, spelling, and grammar. Only terminal academic titles (Ph.D., Ed.D, J.D., M.D) and only the CRM, CA, PMP, FAI, CDIA certification designations will be used. Below is a sample biography.*



Jane Smith, 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.

### 3. Have you taught this topic before? If so, to whom?

## Previous Facilitation Experience

### 4. Provide two conference, business group, etc., for which you facilitated:

Topic/Course Title:

Date:

Location:

## References

5. Please provide 2 facilitation 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, Email Address, and Phone number for both.**

## Education Information

### 6. Title

The title of the submission should reflect the topic. **Titles are to be no more than 8 words.** Do not use abbreviations, acronyms, or trademarks.

### 7. 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?). It should 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.

### 8. Learning Objectives

Briefly state three to four specific, measurable learning objectives that complete the following sentence, **"Upon completion of this session/workshop, participants will be able to..."**

#### Tips for Writing Effective Learning Objectives

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

### 9. Specify Instructional Delivery Methods

How are you going to relay this information to the participants? What instructional methods do you plan to use? (group discussion, demonstration, round table, case study, etc.) **Note:** Please identify what, if any, interactivity will be provided within the context of this education offering. Participants prefer some degree of interaction with the facilitator and/or the group in order to ensure learning and explore application issues.

### **Instructional Delivery Methods**

A number of factors determine the delivery format you select for your education offering such as, the purpose, objectives, outcomes, number of participants, facility, equipment and budget. Below are a few examples of delivery formats.

- **Lecture/Presentation** provides a large amount of information in a limited amount of time. An efficient method of providing information not readily available in print or other formats. **Has the lowest retention rate of all teaching methods.**
- **Lecture with Discussion** involves participants after the lecture by allowing them to ask questions to clarify or offer comments.
- **Symposiums** are useful for current issues or “hot topics”. It consists of brief presentations, generally 3 – 6 presenters (15 min./person). Symposiums may include a panel discussion with audience questions.
- **Panels** work well for policy issues and debate. Panelist dialogue among themselves. Generally does not include audience discussion. Panelist’s discussion should stimulate the audience’s thinking.
- **Small Group Discussion** allows participation of all learners and can be utilized in a lecture format. Requires thoughtful planning, but is easy to implement in even large sessions. Facilitator poses questions or problems to audience and asks them to join in discussions with those around them.
- **Round Table Discussion** is facilitated to initiate specific discussions. Groups of participants partake in discussion of information, issues, problems, or questions. Often each group is given a different topic.
- **Buzz Session** is a method for dividing 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 timeframe 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 propose the basic question, “What would you do? It’s an effective method of provoking controversy and debate on issues for which definite conclusions do not exist.
- **Problem-Solving** provides the opportunity for participants to solve a problem through the collection, application, and assessment of information. An effective teaching method 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.
- **Demonstration** is effective as long as it is directed at specific learner outcomes. Used to illustrate or explain a specific skill or procedure by modeling how to perform practices/procedures.

### **10. Format Options**

ARMA International offers five distinct formats to share knowledge and experience to facilitate participant learning: sessions, workshops, poster sessions, pre-conference seminars, and web seminars. Select the type of format that will offer the most promising experience for participants to actively engage your content while exploring ways to apply it to their job.

- **Sessions** integrate presentations with discussions and interactive exercises on general to specific topics. They provide practical information on a particular topic emphasizing its application on the job. Sessions range from 1 – 3 hours.
- **Workshops** are designed to provide participants an opportunity to engage in interactive learning using data, examples, procedures, and processes participants can discuss, examine, and apply. Due to their extended length, workshops allow for active participation and reflection. Workshops are offered as 2-hour, 4-hour or 8-hour programs.
- **Poster Sessions** combine visual displays of key information on a 4’ x 8’ board accompanied with written and verbal presentations and small group interaction. This offers an opportunity to engage in one-on-one conversation with the facilitator and fellow participants. Poster sessions are available for a 3-hour viewing period. Participants spend as little or as much time at the posters, as desired.
- **Pre-Conference Seminars** are one-day or two-day programs focusing on the latest topics in specialized fields of study related to records and information management.
- **Web Seminars** are a valuable tool for presenting quick, informative education on the latest topics. Web Seminar are approximately 45-60 minutes in length and are asynchronous.

### 11. Education Topic:

Review the requested proposal topic list and select the topic for which this proposal is for.

### 12. Competency Domain/Track

ARMA education is divided into six domains. Identify the competency domain your education course covers.

- **Business Functions:** This domain pertains to the knowledge and skills necessary to administer, implement, or maintain the non-RIM specific functions an organization performs, or needs to perform, to achieve its objectives. Examples of business functions include the supervision of RIM staff, budgeting, providing customer service, identifying and mapping work processes, providing input to management, and strategic planning.
- **Communications and Marketing:** This domain pertains to the knowledge and skills necessary to effectively exchange thoughts, messages, or information by speech, writing, or behavior and to effectively champion the benefits of a RIM program within an organization. The Communications and Marketing domain is vital to developing successful business relationships to maximize RIM support and compliance, and promote the value of RIM principles and best practices.
- **Information Technology:** This domain pertains to the knowledge and skills necessary to develop, maintain, and use information processing systems, software applications, and supporting hardware and networks for the processing and distribution of data. Examples of information technology tasks in this context include the RIM software application selection process, reprographics and imaging equipment, establishing requirements for IT related to managing electronic repositories, and the identification of emerging technologies. As RIM is operating in an increasingly electronic and digital environment, appropriate knowledge and skills in relevant aspects of information technology are critical for RIM professionals at all competency levels.
- **Leadership:** This domain pertains to the knowledge and skills necessary to motivate groups of people toward the achievement of the RIM program goals within the context of the organization's overall goals. Effective leaders must positively influence others by using leadership skills such as guiding, motivating, and mentoring; and interpersonal skills such as empathy and sensitivity.
- **RIM Practices:** This domain pertains to the knowledge and skills required to systematically manage records and information from creation or receipt through processing, distribution, organization, storage and retrieval, and ultimate disposition. Information is a vital organizational resource, and organizations depend on accurate, readily available information to assist in management decision-making, provide litigation support, improve organizational efficiency, document compliance with legislative and regulatory requirements, and to provide historical reference.
- **Risk Management:** This domain pertains to the knowledge and skills necessary to proactively mitigate and manage the potential for damage to or loss of records and information. Two risk management components—risk analysis, which identifies the probabilities that records and information will be damaged or lost, and risk assessment, which examines known or anticipated risk to records and information—are key concepts to systematically controlling the level of risk exposure of an organization. Additional risk management components from an operational perspective are business continuity and disaster preparedness and recovery.

### 13. Experience Level

Identify the level of experience required for participation in your education course from the following choices. ARMA education is divided into four levels. The following describes the RIM practitioner at these levels.

- **Level 1:** This level RIM practitioner is defined as an entry-level position in the RIM profession, with no prior experience in RIM required. Participants in the field at this level should be acquiring basic, foundational knowledge and skills for the RIM field and have a basic understanding of what records and information management is. Level 1 may or may not have an undergraduate degree or work experience in another field, but generally has no specific skill sets in RIM.
- **Level 2:** This level RIM practitioner has prior RIM knowledge, skill sets and experience. In addition, this person may be developing specialty skills (analysis, audit, warehousing, and application technologist), understands more than the basic techniques and technologies, have managed or developed records



management projects, and knowledge of information management lifecycle concepts. In some cases, the individual may also have experience supervising other RIM staff.

- **Level 3:** This level RIM practitioner is a seasoned practitioner who has worked at the enterprise level of an organization and possesses extensive knowledge of the design, creation, implementation, and management of a records management program and staff. This practitioner looks to high-level experts for best practices, advanced techniques, or technology innovations to learn and grow in the field.
- **Level 4:** This level RIM practitioner is at the executive level, making strategic decisions, collaborating with organizational executive management and giving enterprise direction to RIM program staff and program users. Practitioners at this level may hold a master's degree and appropriate certifications. For personal growth, continuing education focuses on business strategy, change management, business policies, leading teams, and collaborations and partnerships.

#### 14. Job Aids/ Tools/ Participant “Take-Aways”

Participants expect to receive solutions and job aids/tools at conference. What job aids/tools (take-aways) will you provide in your education offering? This is a **critical component** of your proposal. It is not PPT slides.

### 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.

**Commercial Presentations** may be delivered as Exhibitors and Sponsors of our annual show. For information on exhibiting and these speaking and presentation opportunities, contact the Exposition Manager, [Elizabeth Zlitni](#).

#### Selection Criteria

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

Education offerings 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/solutions.

#### All proposals are reviewed with the following criteria:

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

#### 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 information
- Innovative and new approaches to current and emerging issues
- Offer/include performance improvement tools or job aids
- Relevance to the program topics 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
- Facilitators with expertise in topic areas and demonstrated interactive teaching skills as evidenced by evaluations and recommendations

### Limit for Number of Facilitators

Sessions are limited to three facilitators, and panels are limited to three panelists plus one moderator for a total of four. ***Exceptions to these limits must be approved by ARMA International.***

Facilitators are limited to delivering two education programs. Facilitators may serve on a panel in addition to delivering two education programs.

## 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. Since its establishment in 1956, the association has grown to more than 10,000 members including records and information managers, 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 more than 50 countries.

### Target Audience

Average conference and expo attendance exceeds 5,000 from numerous professional backgrounds/levels and all parts of the world! The attendees represent over 30 countries and more than 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.