

4TH ANNUAL

APRIL &  
MAY  
2024

# ARMA PASSPORT

# SPRING SEMINAR MANIA



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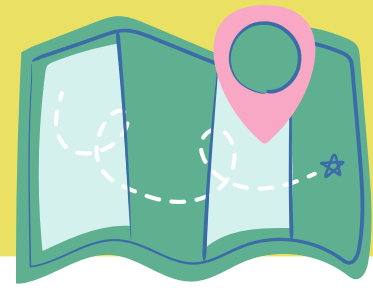
FREE

ONLINE

16 CHAPTERS

2 MONTHS

# ABOUT



**Welcome to the 2024 Spring Seminar Mania Program! Born out of necessity in 2021, when gathering together with colleagues was not a viable option for chapters, the greater Midwest ARMA chapters forged untraveled (virtual) territory. These chapters came together and through a lot of hard work, creativity, technology, and passion, the very first Spring Seminar Mania was held. It was a colossal success! We found this format was so much more than a novelty during those challenging times. It has evolved into a practical, sustainable, and boundaryless way for all of us to join together for our common interests, participate in educational sessions, and network with colleagues from all over the country. 16 ARMA Chapters have partnered to provide 16 educational sessions during the months of April and May. Our program participants span the country, from Washington state to Florida, expanding our regional diversity far beyond the Midwest.**

**So grab your virtual passports and get ready to visit some spectacular destinations. Each time you attend a seminar, your virtual passport is stamped. The more places you visit the more passport stamps you get. The more passport stamps you get the more chances you have to win prizes during and at the end of the event. Don't wait! Pack your virtual bags!**

**Learn from the experts in our field, tour these fabulous cities & states graciously hosted by our participating ARMA Chapters, and win great prizes. Mark your calendar and join us for one, many, or all of the following seminars.**

## **Seminar Dates:**

**April 11, 16, 17, 18, 23, 24, 25, & 30**

**May 2, 7, 9, 14, 15, 16, 21, 29, & 30 (finale event)**



**STAMP  
YOUR**

**PASSPORT**

**Thanks to the generosity of our sponsors at VRC, wonderful prizes await you during and at the end of your trip. Prizes include 32 \$50 gift cards donated by VRC.**

**Extend your virtual vacation for another day by attending the Spring Seminar Mania's event finale on Thursday, May 30, 2024 where we will play a records trivia game, network with one another, and announce the grand finale door prize winners.**

#### **How to Qualify to Win Door Prizes:**

**Every time you attend a meeting your digital passport will be stamped thereby placing your name into a drawing for the end of event door prizes. The more meetings you attend, the more chances you'll have to win via raffle or trivia!**

**NOTE: Attendees may opt out of prize drawings. Simply include a note to withdraw from door prize winnings each time you register for a session.**

#### **Prize Winners:**

**Winners will be randomly selected and announced at the event finale Thursday, May 30, 2024. Winners will be formally notified via e-mail by the Spring Seminar Mania Prize Committee (one prize per person).**



**SIGN UP  
TODAY!**

DSTN:

**PROGRAM SCHEDULE**

NO:

**APRIL 11-18**



## **Elizabeth Adkins**

### ***Lessons from the Past: Preparing for the Future of Information Governance***

Records management has reinvented itself several times during the last few decades. Join Elizabeth Adkins, the 2019 Information Governance Leader of the Year, as she reflects on her career and offers insights on how we can adapt to meet the challenges and opportunities the new information governance landscape has to offer.



12 - 1 PM  
EDT

11 AM - 12 PM  
CDT

9 - 10 AM  
PDT



## **Daniel Stoller**

### ***Quick DNA: The New Detective in Crime Fighting***

Quick DNA technology is in the pilot stages in Louisiana and promises to be a way to fight crime in a more effective way. In this program, experts will examine how the technology will augment crime-fighting.



1 - 2 PM  
EDT

12 - 1 PM  
CDT

10 - 11 AM  
PDT



## **Jim Merrifield**

### ***Unlocking the Power of Persuasion - A Playful Journey into Marketing Your Information Governance Program***

Leave the journey equipped with the tools to take your IG program to the next level and achieve greater visibility, engagement, and support from stakeholders across the organization. Don't miss the boat!



1 - 2 PM  
EDT

12 - 1 PM  
CDT

10 - 11 AM  
PDT

**SIGN UP  
TODAY!**

DSTN:

**PROGRAM SCHEDULE**

NO:

**APRIL 18-24**



## Azure Brown

### *What's Your Conflict Management Style?*

Learn what your conflict management style is, understand the neuroscience behind it, and how to respond to others in a conflict situation.



**APRIL  
18**

1 - 2 PM  
EDT

12 - 1 PM  
CDT

10 - 11 AM  
PDT



## Andrew Ysasi

### *IG and Artificial Intelligence*

No matter your field - Records Management, Privacy, Security, Compliance - this presentation will give you AI considerations for the organization and tips on how the IG/RIM professional can prepare for AI success.



**APRIL  
23**

12 - 1 PM  
EDT

11 AM - 12 PM  
CDT

9 - 10 AM  
PDT



## Krista Sorenson

### *Best Practices for Long-Term File Preservation*

Krista Sorenson, the Electronic Records and Digital Preservation Archivist for the Wisconsin Historical Society, will provide the challenges and best practices for preserving digital files for the records life cycle.



**APRIL  
24**

1 - 2 PM  
EDT

12 - 1 PM  
CDT

10 - 11 AM  
PDT

**SIGN UP TODAY!**

DSTN:

**PROGRAM SCHEDULE**

NO:

**APRIL 25 - MAY 2**



## Jesse Wilkins

### *Records Management in the Age of Privacy*

Regulators' increased focus on privacy and data protection requires us to rethink how PI is managed. Far more than posting a privacy notice on a website, it's about what's collected, how it's used, and how it's managed over time.



**APRIL 25**

1 - 2 PM  
EDT

12 - 1 PM  
CDT

10 - 11 AM  
PDT

## Teresa Drabenstadt

### *How's Your IG/IT Relationship?*

How's your relationship with IT? Does your RIM/IG Program need a "restart"? Attend this session to learn how to reboot your Information Governance Program, and also your relationship with IT.



**APRIL 30**

12 - 1 PM  
EDT

11 AM - 12 PM  
CDT

9 - 10 AM  
PDT

## Rich DeMello

### *Enterprise-Wide eSignature*

eSignature is legal and it makes offices more efficient, streamlines processes, and makes record keeping easier. Attendees will receive information about how to adopt it in house, and how to offer it as a service to others.



**MAY 2**

12 - 1 PM  
EDT

11 AM - 12 PM  
CDT

9 - 10 AM  
PDT

**SIGN UP TODAY!**

DSTN:

**PROGRAM SCHEDULE**

NO:

**MAY 7 - 14**



## Jennifer Chadband & Richard Surber

### *Moving to Big Bucket-Strategies and Best Practices for Simplifying Your Retention Schedule*

Learn how to simplify your retention schedule using Big Bucket-Strategies in order to help your organization achieve its compliance goals. We will consider common pain points and opportunities for schedule simplification.



12 - 1 PM  
EDT

11 AM - 12 PM  
CDT

9 - 10 AM  
PDT

## Lynn O'Shea & Wendy Gibson

### *Email Deleting Parties in Large and Small Organizations*

An email deleting party is a live, interactive employee training designed to teach defensible deleting and enhance your brand. Learn how to host a successful deleting party, including suggested email topics, pace, and formatting.



1 - 2 PM  
EDT

12 - 1 PM  
CDT

10 - 11 AM  
PDT

## Dr. Patricia Franks

### *Demystifying AI: Challenges and Solutions for Records and Information Managers*

Need assistance in capturing, managing, and preserving digital content? If so, artificial intelligence (AI) and machine learning (ML) are tools you may need. Learn when, and when not, they may be just what you need.



1 - 2 PM  
EDT

12 - 1 PM  
CDT

10 - 11 AM  
PDT

**SIGN UP TODAY!**

DSTN:

**PROGRAM SCHEDULE**

NO:

**MAY 15 - 21**



## **Matt Kilboy**

### ***Improving Business Outcomes with Intelligent Data Processing (IDP)***

Organizations seek to modernize operations by adopting emerging technologies that support secure, flexible work environments. An IDP solution can extract useful information from both structured and unstructured documents.



12 - 1 PM  
EDT

11 AM - 12 PM  
CDT

9 - 10 AM  
PDT

## **Matt McMahan**

### ***Developing and Implementing a Privacy Assessment Program***

A challenge for Records Managers is that regulators rarely offer clear guidance on how to translate legal requirements into practice. You will learn practices to help you create and operationalize a privacy assessment program.



12 - 1 PM  
EDT

11 AM - 12 PM  
CDT

9 - 10 AM  
PDT

## **Deborah Robbins**

### ***Before Disaster Hits***

Across the world there are disasters created by humans and nature. This presentation will cover how to Identify Threats, Understand Recovery Essentials, Share Practical Tips for Recovery Events and for Collaboration in Recovery.



12 - 1 PM  
EDT

11 AM - 12 PM  
CDT

9 - 10 AM  
PDT



**SIGN UP TODAY!**

DSTN:

**PROGRAM SCHEDULE**

NO:

**MAY 29-30**



## **Tom Corey**

### ***The IG Professional's Role in the AI and Data Privacy Revolution***

In this presentation, the focus will be on how the IG Professional can embrace both AI and Data Privacy by linking the potentials of AI growth with protecting and promoting the interests of their organization's data privacy group.



**1 - 2 PM  
EDT**  
**12 - 1 PM  
CDT**  
**10 - 11 AM  
PDT**



## **ARMA PASSPORT 2024 FINALE**

# **TRIVIA & NETWORKING**



**12:30 - 2 PM  
EDT**  
**11:30 - 1 PM  
CDT**  
**9:30 - 11 AM  
PDT**

**TRIVIA • GAMES • FABULOUS PRIZES**

**MEET OTHER PROFESSIONALS**

**16 CHAPTERS**



**Sign up today:**



**[armamilwaukee.org/eventer/extendvacation4/](https://armamilwaukee.org/eventer/extendvacation4/)**

**ON APRIL 11th TRAVEL TO**

# **Triangle, NC**



## **ABOUT THE TRIANGLE**

The Triangle refers to the region in North Carolina anchored by the cities of Raleigh, Durham, and Chapel Hill. The Research Triangle Park is one of the largest research parks in the world.

## **FUN FACT**

Raleigh is often referred to as the "City of Oaks" due to its numerous oak trees that line the streets downtown. The annual North Carolina State Fair consistently ranks in the top ten most popular fairs in the United States.

## **UPCOMING EVENTS**

**Merlefest (April 25-28) music festival in Wilkesboro, NC.**

## **ABOUT ARMA TRIANGLE**

Chartered in 1982, members represent various industries within the Research Triangle region such as pharmaceuticals, health care, universities, government, legal, and utilities. The chapter received the Chapters Luminary Award in 2018.



**click [here](#) to learn more**

# Elizabeth Adkins

*Lessons from the Past: Preparing for  
the Future of Information Governance*

**THURSDAY, APRIL 11, 2024**

**12 - 1 PM EDT / 11 AM - 12 PM CDT / 9 - 10 AM PDT**

## About the Program



Records and information governance professionals are currently navigating a period of unparalleled change and opportunity, leading many to question: What skills are necessary for success? How can we adapt to the rapid pace of change? How can we stay informed about the latest developments? To better comprehend the challenges that lie ahead, it is beneficial to reflect on the evolution of our profession and consider how lessons learned can equip us for the future.

Elizabeth Adkins embarked on her career as an archivist before transitioning first to records and information management, and subsequently to information governance. In this presentation, she will delve into her personal journey and the progression of the profession over the past several decades. She will also share her insights on the forthcoming challenges.

## About Elizabeth Adkins

Elizabeth W. Adkins, CRM, CA Emeritus, IGP, is Director of Information Governance at Davis Wright Tremaine LLP. She is a highly respected thought leader and experienced subject matter expert in information governance, including records management, data privacy, e-discovery, and data classification. She is a certified Information Governance Professional, Certified Archivist Emeritus, Certified Records Manager, and a Fellow of the Society of American Archivists (SAA). She has a long and distinguished track record of professional leadership, including serving as Treasurer and President of SAA, President of the Academy of Certified Archivists, a faculty member of the Electronic Discovery Institute, a frequent contributor to ARMA International, a leader of the Northern Virginia chapter of ARMA, and a frequent speaker on information governance topics. In May 2019 the Information Governance Initiative recognized her as Information Governance Leader of the Year.



**ON APRIL 16th TRAVEL TO**

# **New Orleans, LA**



## **ABOUT NEW ORLEANS**

**New Orleans is known as the country's most European-like city, featuring diverse cultural roots, music, and food, making it a tourist's delight. It is a gateway to the U.S.**

## **FUN FACT**

**New Orleans will host SuperBowl LIX on February 9, 2025, tying Miami for hosting the most Super Bowls with 11.**

## **UPCOMING EVENTS**

**Est. in 1984, the French Quarter Music Festival is a 4-day local showcase that is the largest free music event in the U.S. It features the 'Culinary Lineup' food booths operated by some of New Orleans finest restaurants.**

## **ABOUT ARMA GREATER NEW ORLEANS**

**Serving the records and information management community since 1964, the Greater New Orleans ARMA chapter has been instrumental in providing education, support, and networking opportunities to professionals in the region.**



click [here](#) to learn more



**GREATER NEW  
ORLEANS  
PROGRAM**

# Daniel Stoller

***Quick DNA: The New Detective in  
Crime Fighting***

**TUESDAY, APRIL 16, 2024**

**1 - 2 PM EDT / 12 - 1 PM CDT / 10 - 11 AM PDT**

## About the Program



A backlog of DNA tests has kept New Orleans from solving multitudes of crimes and encourages more crime because of the lack of prosecution. Emerging on the scene in the past few months, Quick DNA technology is in the pilot stages in the New Orleans and Baton Rouge areas in Louisiana as a way to fight crime in a more effective way. With the new technology, people already arrested can be identified for other crimes they have committed and held instead of released to commit more crimes. It allows the authorities to “connect the dots” while not taking the risk of arresting innocent people. Join us in this “fireside chat” as experts reveal what the technology means to our areas.

## About Daniel Stoller

Daniel Stoller is a certified U.S. and EU privacy professional and technologist with over 9 years of experience in privacy, project management, consulting, journalism, public and legal services. His award-winning work has exuded a strong track record of leading companies in synthesizing complex information under tight deadlines for corporate, legal, public policy, and regulatory audiences.

Click [here](#)  
to register!



**ON APRIL 17 TRAVEL TO**

# **Kansas City**



## **ABOUT KANSAS CITY**

**KC has hosted the NFL draft, the most basketball games in March, and the 2026 World Cup. Our teams include KC Chiefs, KC Royals, KC Monarchs, Sporting KC, and KC Current.**

## **FUN FACT**

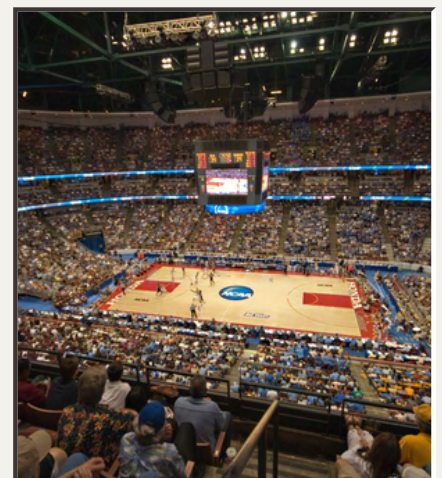
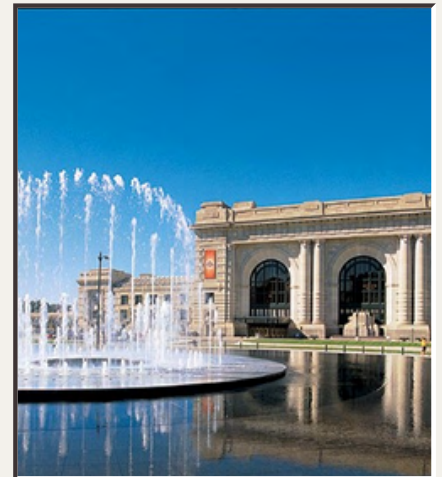
**The American Royal World Series of Barbecue is the largest barbecue contest in the WORLD. Walt Disney opened Laugh-O-Gram Studios in KC where Mickey Mouse was inspired by a real-life mouse. It is also where Hallmark is headquartered.**

## **UPCOMING EVENTS**

**May 24, 2024: An immersive tribute to the 100th anniversary of the Walt Disney Company.**

## **ABOUT ARMA GREATER KANSAS CITY**

**The Greater Kansas City Chapter has been in existence for over 50 years and serves both the Missouri and Kansas Metropolitan areas.**



**click [here](#) to learn more**

**GREATER  
KANSAS CITY  
PROGRAM**

# Jim Merrifield

***Unlocking the Power of Persuasion – A Playful Journey into Marketing Your Information Governance Program***

**WEDNESDAY, APRIL 17, 2024**

**1 - 2 PM EDT / 12 - 1 PM CDT / 10 - 11 AM PDT**

## About the Program



Take a journey into the world of marketing your information governance program. With an emphasis on creativity and outside-the-box thinking, this presentation will provide attendees with practical strategies and techniques for effectively promoting and communicating the importance of their information governance program to key stakeholders. Jim will delve into marketing a successful information governance program and explore key topics such as branding, messaging, and audience targeting. You will discover innovative tactics for crafting compelling content, leveraging social media and other digital channels, and generating buzz and excitement around your information governance program.

## About Jim Merrifield

Jim Merrifield has nearly 20 years of experience in information governance, privacy, and data security. He is the Director of Information Governance & Business Intake at Robinson & Cole LLP. He also serves as Vice Chair on the ARMA International Board of Directors. Jim hosts an innovative podcast, InfoGov Hot Seat. In each episode, Jim engages in candid conversations with practitioners, consultants, and solution providers on hot topics in the information governance field. Jim is a certified Information Governance Officer and certified Information Governance Professional.

**ON APRIL 18 TRAVEL TO**

# Oklahoma



## ABOUT OKLAHOMA

OKC proper has a population of 599,999. Tulsa is known as the Father of Route 66. Bread twist tie was invented in Maysville. First Girl Scout Cookie was sold in Muskogee in 1917.

## FUN FACT

Known as Tornado Alley for its severe weather, Oklahoma also has a rich Native American heritage and is home to 39 federally recognized Native American tribes. The official state wildflower is the Indian blanket.

## UPCOMING EVENTS

Chapter Meeting 5/16, a cybersecurity expert on “Business Continuity and Disaster Recover-Enhancing Data Security.” In June, Annual Membership Appreciation Lunch in a central location to get more members together in person.

## ABOUT ARMA OKLAHOMA

With fifty-plus years’ presence in Oklahoma, the Tulsa chapter merged with OKC in 2020 to form one ARMA Chapter for all of Oklahoma. Our chapter currently has more than 40 active members.



[click here to learn more](#)



# Azure Brown

## *What is Your Conflict Management Style?*

**THURSDAY, APRIL 18, 2024**

**1 - 2 PM EDT / 12 - 1 PM CDT / 10 - 11 AM PDT**

### About the Program

Click [here](#)  
to register!



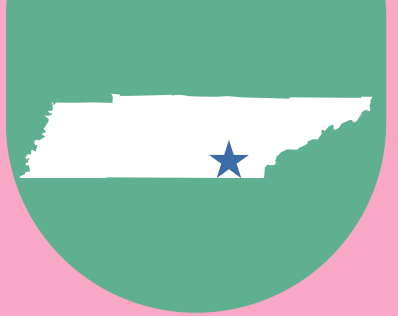
RIM professionals deal with conflict daily. It can range from the need for financial support to finding your forever home in the organizational structure. Either way, you have to be able to effectively communicate and collaborate with various stakeholders and there is bound to be conflict. This presentation will provide an assessment to learn what your conflict management style is, understand what is happening in the brain during conflict and how to effectively manage it. Participants will receive a Conflict Assessment.

### About Azure Brown

An expert in conflict management within the RIM field, Azure G. Brown, MSIS, CRM, CCM currently serves as the Records Management Officer at Austin Community College and as a volunteer mediator and conflict coach. She credits her own experiences avoiding conflict and subsequently learning to manage it with springboarding her success as a “conflict management evangelist.” Since 2021, Azure has been spreading her message and most recently shared her knowledge, insight, and experiences at the Annual 2023 e-Records Conference in Texas, as well as at the Texas Library Association: Black Caucus Roundtable.

**ON APRIL 23rd TRAVEL TO**

# **Chattanooga, TN**



## **ABOUT CHATTANOOGA**

**Known as Scenic City, Chattanooga is one of America's most breath-taking cities. Surrounded by mountains, art districts, music, and dining and complemented by world-class attractions.**

## **FUN FACT**

**Chattanooga is the home of the world's first Coca-Cola Bottling company, opening in 1899. It is also the birthplace of the tasty "MoonPie." These snack cakes began in 1917 and are still produced in Chattanooga today.**

## **UPCOMING EVENTS**

**Chattanooga Comic Con, October 26-27. Guests include voice actors Clifford Chapin, Leah Clark, Ming Chen, Scott Innes, and Jae Lee. Watch for more information: @chattcomiccon.**

## **ABOUT ARMA GREATER CHATTANOOGA**

**The Greater Chattanooga Chapter is small but "mighty." Several of our members are long-standing ARMA International members. The Chapter won the COTY Small Chapter award 11 times. We strive to help advance careers, education, and networking.**



**click [here](#) to learn more**

# Andrew Ysasi

## *IG and Artificial Intelligence*

THURSDAY, APRIL 23, 2024

12 - 1 PM EDT / 11 AM - 12 PM CDT / 9 - 10 AM PDT

### About the Program

Click [here](#)  
to register!



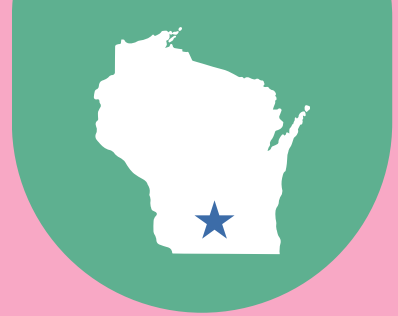
Artificial intelligence (AI) tools have garnered much interest over the past few years. Organizations such as Harvard talk about AI's future, ZDNet says business success and growth involve AI, and The White House issued an executive order in 2023 on the use of AI. AI is no longer an emerging technology, and we must be prepared to address AI as IG/RIM professionals. We will discuss the relatively new ISO standards that cover Artificial Intelligence, the features of AI, and how Machine Learning (ML) is part of AI. Further, we will explore how AI tools such as Chat GPT, Google's Bard, and others can be used at work, as well as expectations of those tools and how fast these tools are coming.

### About Andrew Ysasi

Andrew Ysasi (pronounced EE-SA-SEE), MS, CRM, IGP, CIP, CIGO, FIP, CIPM, CISM, PMP, has 25 years of experience in executive leadership and information governance. As Vice President of Advocacy for VRC, Andrew mentors, educates, and volunteers with the IG community on behalf of VRC. In addition to VRC, he served on the Executive Committee for the ICRM from 2020-2023, is an instructor at San Jose State University's MARA program, and a resume expert with Admivio®, where his work is published on CIO.com. In the past, Andrew contributed to ARMA's IGBOK and Wiley's Information Governance 2nd Edition.

**ON APRIL 24th TRAVEL TO**

# **Madison, WI**



## **ABOUT MADISON**

**Madison, WI offers both small town charm and a range of leisure and cultural opportunities usually found in larger cities. It has been continually ranked as a best place to live.**

## **FUN FACT**

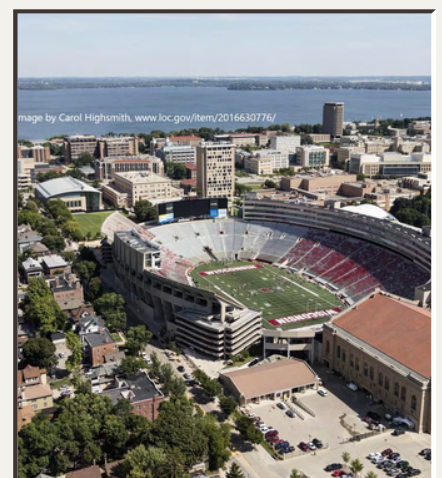
**The State Capitol was built with 43 types of stones from six countries and eight states. A city of Madison ordinance prevents any new building from being taller than the Capitol dome.**

## **UPCOMING EVENTS**

**The World's Largest Brat Fest is held on Willow Island at the Alliant Energy Center in Madison every Memorial Day weekend as a fundraiser for local charities and has grown to support over 100 non-profits today.**

## **ABOUT ARMA MADISON**

**ARMA Madison aims to promote the advancement and professional competence of its members to enable them to provide records and information management leadership and expertise within their organizations and their communities.**



**click [here](#) to learn more**

**MADISON  
PROGRAM**

# Krista Sorenson

## *Best Practices for Long-Term File Preservation*

**WEDNESDAY, APRIL 24, 2024**  
1 - 2 PM EDT / 12 - 1 PM CDT / 10 - 11 AM PDT



## About the Program

Work environments create electronic records in a variety of file formats. Over time, these formats may become obsolete or unusable, rendering these electronic records inaccessible. Monitoring and regulating the usage of file formats can help minimize the risk of records loss. Furthermore, standardizing formats reduces costs and provides a platform to better manage records over time. This work is also essential in forming a digital preservation strategy, which can help ensure your records are accessible, accurate, authentic, reliable, legible, and readable throughout the records life cycle. Learn challenges and best practices for preserving digital files for the records life cycle.

## About Krista Sorenson

As of 2020, Krista Sorenson serves as the Electronic Records and Digital Preservation Archivist for the Wisconsin Historical Society (WHS), where she facilitates the transfer of electronic records from state and local agencies to the archive in addition to conducting processing, preservation, and access actions on collection materials. Prior to her start at the WHS, Krista worked on digitization projects at the State Library of North Carolina and in local government records management at the Mississippi Department of Archives and History.

**ON APRIL 25th TRAVEL TO**

# **Milwaukee, WI**



## **ABOUT MILWAUKEE**

**Milwaukee is the largest city in the state of Wisconsin. Located on Lake Michigan's western shore, Milwaukee is known for its brewing traditions and home to Harley Davidson Motorcycles.**

## **FUN FACT**

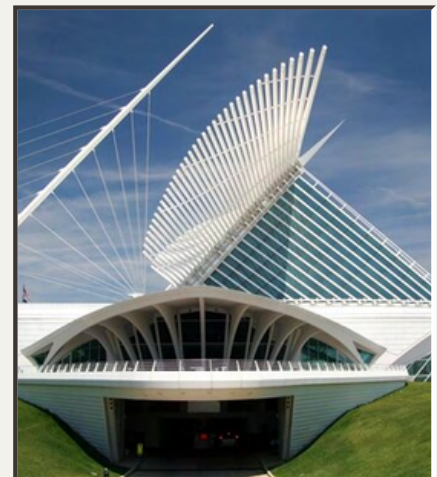
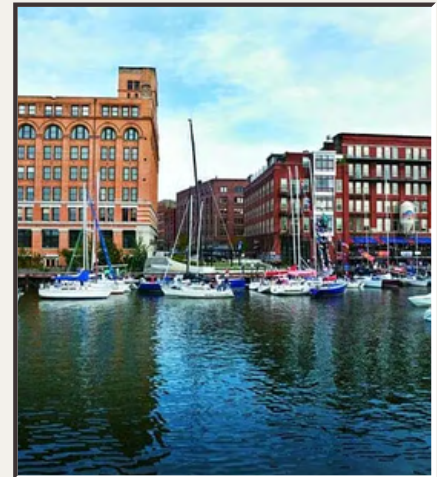
**Milwaukee is home to the oldest certified bowling alley in the U.S. at the Holler House.**

## **UPCOMING EVENTS**

**Summerfest, the world's largest music festival features dozens of free stages with 100s of artists, takes place between June and July.**

## **ABOUT ARMA MILWAUKEE**

**Established on March 6, 1948, as the "Milwaukee Filing Association," ARMA Milwaukee is one of the first ARMA Chapters chartered. ARMA Milwaukee services the eastern portion of Wisconsin, with members also in Oshkosh, Stevens Point, and Green Bay.**



**click [here](#) to learn more**

**MILWAUKEE  
PROGRAM**

# Jesse Wilkins

## *Records Management in the Age of Privacy*

**WEDNESDAY, APRIL 25, 2024**

**1 - 2 PM EDT / 12 - 1 PM CDT / 10 - 11 AM PDT**

### About the Program

Click [here](#)  
to register!



Regulators' increased focus on privacy and data protection creates significant challenges and opportunities for organizations to rethink how customer information is managed. Research shows that customers prefer organizations with robust privacy practices, but it takes more than slapping a privacy notice on a website. Organizations need to fundamentally reexamine what they collect, how it's used, and how it's managed over time.

This session covers: privacy in 2024 and the impact on organizations; ways RIM's focus has changed and the impact on retention and disposition; the idea of data minimization; "purpose-based retention" and how it can improve retention overall as well as support an effective program.

### About Jesse Wilkins

Jesse Wilkins, CIP, CIPP/US, CIPM, IGP, CRM, edp, ICE-CCP has worked in the information management industry for nearly 30 years as an end user, vendor, consultant and trainer. His areas of expertise include information governance, records management, enterprise content management, social media governance, and training and certification development/delivery. He has given over 200 workshops on information management to companies and government agencies around the world. For more on Jesse's background and expertise, please see his LinkedIn profile at: [www.linkedin.com/in/jessewilkins/](http://www.linkedin.com/in/jessewilkins/)

**ON APRIL 30th TRAVEL TO**

# **Northern Virginia**



## **ABOUT NORTHERN VIRGINIA (NOVA)**

**Northern Virginia is an historic, thriving, and diverse region located south and west of Washington, D.C.**

## **FUN FACT**

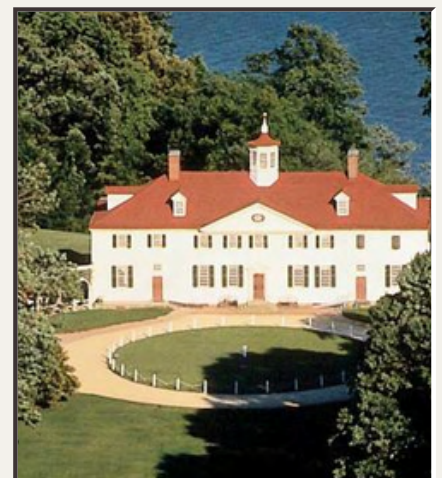
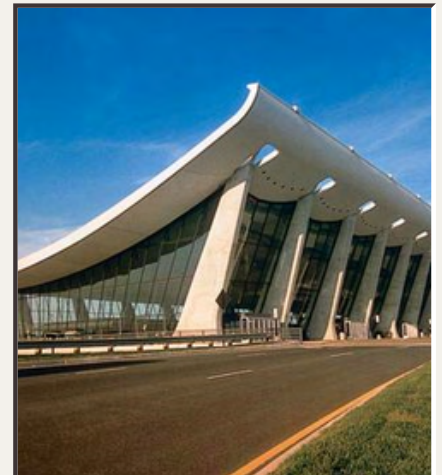
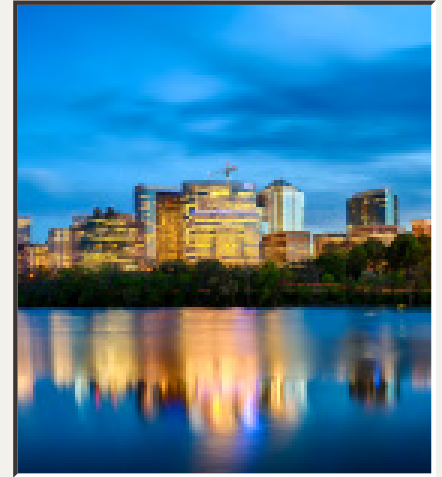
**The D.C. area's first baseball team, the Senators, began playing in 1901 but they left in 1971. There was no professional baseball for 34 years until a team, the Washington Nationals (the "Nats"), adopted the city as its own.**

## **UPCOMING EVENTS**

**The National Cherry Blossom Festival commemorates the 1912 gift of 3,000 cherry trees from the Mayor of Tokyo to the city of Washington, DC. It welcomes about 1.5 million people to enjoy diverse and creative programming.**

## **ABOUT ARMA NOVA**

**ARMA NOVA is an award-winning chapter that fosters collaboration and relationship-building for knowledge-seeking records and information management and IG professionals in the region who wish to advance their careers and share their knowledge.**



**click [here](#) to learn more**



**NOVA  
PROGRAM**

# Teresa Drabenstadt

*How's Your IG/IT Relationship?*

**TUESDAY, APRIL 30, 2024**

**12 - 1 PM EDT / 11 AM - 12 PM CDT / 9 - 10 AM PDT**

## About the Program



Click [here](#)  
to register!

**How's your relationship with IT? Does your RIM/IG Program need a "restart"? Attend this session to learn how to reboot your Information Governance Program, and also your relationship with IT. We'll discuss a 90-day plan to quickly assess your current state, design your future state, and develop a roadmap to get there. We'll also discuss challenges you have in working with IT and how to improve your relationships with your IT colleagues. Bring your questions and hear advice from our speaker, who has deep experience in both IT and the governance, risk, and controls space.**

## About Teresa Drabenstadt

**Teresa helps clients to advance their information governance programs, often starting with a Maturity Assessment and providing guidance along the journey. In her prior employment, she led the ARMA Cobalt Award-winning Information Governance Program for a multi-line insurance company in Madison, WI. Teresa has 20+ years of business leadership experience in IT, Compliance, Privacy, and Internal Audit. She has led many large-scale transformational projects using a collaborative approach, resulting in increased efficiency, improved controls, and decreased long-term costs.**

**ON MAY 2nd TRAVEL TO**



# Michigan



## ABOUT MICHIGAN

Whether you are a cityscape adventurer or an outdoor enthusiast, a foodie or a thrill-seeker, Michigan has something to offer everyone.

## FUN FACT

Michigan is the only place in the world with a floating post office. The J.W. Westcott II is the only boat in the world that delivers mail to ships while they are still underway. They have been operating for 125 years.

## ABOUT ARMA MICHIGAN

ARMA Michigan was formed in July 2023 through a merger of all three Michigan chapters to promote and advance the professional competency of its members and enable them to provide records and information management leadership and expertise.



click [here](#) to learn more

**MICHIGAN  
PROGRAM**

# Richard DeMello

***Enterprise-Wide eSignature***

**THURSDAY, MAY 2, 2024**

**12 - 1 PM EDT / 11 AM - 12 PM CDT / 9 - 10 AM PDT**

## About the Program



In March 2020, the State of Michigan Records Management Services added a digital signature service to our catalog of services to State of Michigan agencies. This presentation will cover the selection and acquisition of the eSignature solution, deployment, security considerations, and funding models to pay for the transactions, successes, frustrations, and lessons learned.

## About Richard DeMello

Richard DeMello has over 35 years of information technology experience in a combination of private and public sector jobs. This experience includes leading key modernization initiatives, providing consulting and technical support to Fortune 500 companies, and providing software solutions and custom deployments to solve specific business problems. Most recently there has been a focus on records management, in both applying proper retention to State records and providing tools, like eSignature, to make it easier to properly store, use, and manage records.

Click [here](#)  
to register!



**ON MAY 7th TRAVEL TO**

# **Northeast Ohio**



## **ABOUT NORTHEAST OHIO**

Ohio's northeastern region rises from the shores of Lake Erie and blooms with ethnic neighborhoods and it makes for an amazingly diverse, authentic set of experiences.

## **FUN FACT**

Cleveland is a city of firsts: first city to be lit by electricity, first electric traffic signal, first indoor shopping mall, first rock concert!

## **UPCOMING EVENTS**

**Total Eclipse Fest - Cleveland lies within the path of totality for the Solar Eclipse 2024!**  
**Rock & Roll Hall of Fame 2024 Induction Ceremony coming in the Fall. Don't forget the Akron Pickle Fest in August!**

## **ABOUT ARMA NORTHEAST OHIO**

Our chapter is composed of an incredibly diverse membership of professionals from the legal, medical, government, corporate, nonprofit, commercial records centers, software, financial services, and insurance industries.



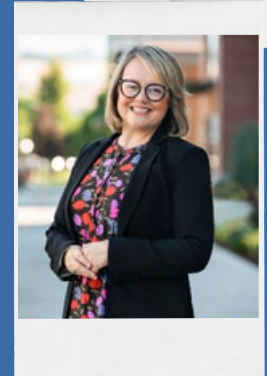
[click here](#) to learn more

## **Richard Surber & Jennifer Chadband**

***Moving to Big Bucket-Strategies  
and Best Practices for Simplifying  
Your Retention Schedule***

**TUESDAY, MAY 7, 2024**

**12 - 1 PM EDT / 11 AM - 12 PM CDT / 9 - 10 AM PDT**



Click [here](#)  
to register!

### **About the Program**

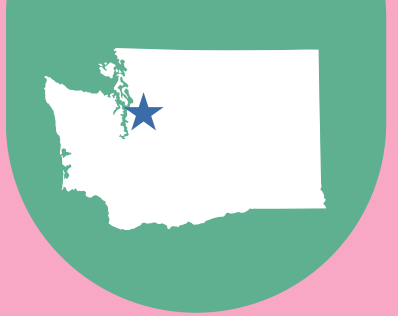
Simplifying your organization's records retention schedule can be a big step towards increased adherence and compliance. Reducing complexities and developing a thoughtful bigger bucket retention schedule are considered industry best practices because they help organizations achieve these goals. This presentation will provide guidance and tips on strategies for moving from a granular retention schedule, or overly complicated schedule, to a simpler big bucket framework while considering important risk factors unique to your organization. We will dig into a series of specific examples so you can see, firsthand, how to simplify an overly complicated retention schedule.

### **About Richard Surber & Jennifer Chadband**

Rick Surber, CRM, IGP, is a senior consultant and licensed attorney at Zasio and co-manager of Consulting. He also manages Zasio's legal Research division. Rick has helped clients ease records and RIM/IG pain points for 14 years, focusing on program enhancement/development. Jennifer Chadband, CRM, IGP, CIPP/E, ECMp, is a senior consultant and licensed attorney at Zasio and co-manager of Consulting. She has extensive experience in a variety of RIM and IG areas, including corporate retention schedule development, with a focus on legal, operational compliance, and risk minimization.

**ON MAY 9th TRAVEL TO**

# **Seattle, WA**



## **ABOUT SEATTLE**

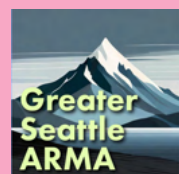
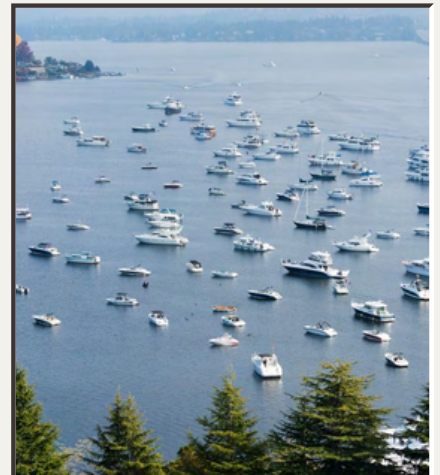
**Greater Seattle is a bustling area that thrives with industrial, commercial, and cultural activity. Enjoying time outdoors is popular thanks to the stunning PNW scenery and climate.**

## **FUN FACT**

**Houston, New York, Atlanta, and Boston get more rainfall yearly than Seattle. Seattle days can be gray and drizzly, but summers are amazing. On average, the city only gets about 38 inches of rain per year.**

## **ABOUT ARMA GREATER SEATTLE**

**The Greater Seattle Chapter, est. 1964, currently has 80+ members, RIM professionals from public, legal, religious, and business organizations. Our area includes Bellingham, Everett, east to Richland and throughout the Seattle metro region.**



**click [here](#) to learn more**

**GREATER  
SEATTLE  
PROGRAM**

# Lynn O'Shea & Wendy Gibson

***Email Deleting Parties in Large  
and Small Organizations***

**THURSDAY, MAY 9, 2024**

**1 - 2 PM EDT / 12 - 1 PM CDT / 10 - 11 AM PDT**

Click [here](#)  
to register!



## About the Program

How do we avoid another dry, droning training session? How do we ensure trainees feel comfortable applying what we've taught? An email deleting party is a live employee training session that incorporates both instructional and active work time for participants. Participants walk away knowing that they have made a genuine impact on their cluttered Inboxes, and instructors walk away knowing that they have developed a fresh facet to their reputation in the organization and have taught defensible deleting to their users. Learn about live email deleting parties with the inventor, Lynn O'Shea from the University of Washington, and Wendy Gibson from VALEGROUP (formerly Vulcan)

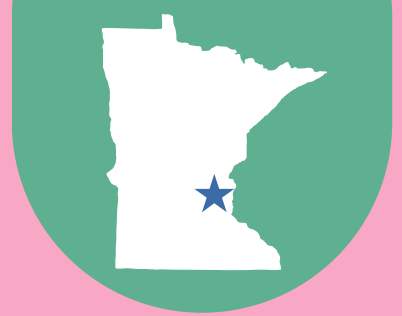
## About Lynn O'Shea & Wendy Gibson

Lynn is a Compliance Analyst for Records Management Services at the University of Washington and has worked for UW for over a decade. Lynn holds a BA from the University of Colorado and a MIS from the University of Michigan. Lynn focuses on building resources for and training staff and faculty.

Wendy has over 20 years of experience in RIM. She holds a CRM certification and a Bellevue College Project Management Certificate. Before coming to VALE GROUP (formerly Vulcan), she supported the Weyerhaeuser Company Finance Groups. She is the Sr. Corporate Records Specialist at VALE GROUP.

**ON MAY 14th TRAVEL TO**

# **Twin Cities, MN**



## **ABOUT THE TWIN CITIES**

The Twin cities of Minneapolis & St Paul were sited along the Mississippi River because of St. Anthony Falls. Today, the Twin Cities is headquarters for 18 Fortune 500 companies.

## **FUN FACT**

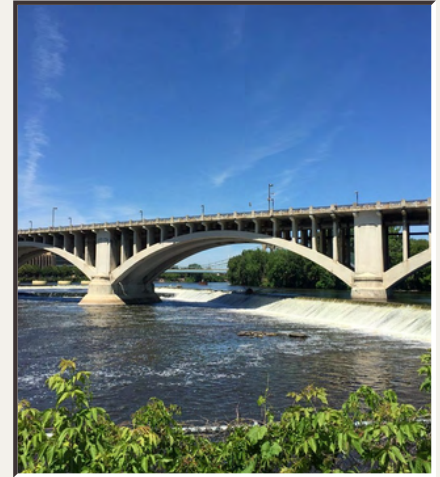
The Minneapolis Skyway System is 9.5 miles of pathways connecting over eighty city blocks. It is the largest in the entire world. Residents and visitors alike appreciate its climate-controlled safety and comfort.

## **UPCOMING EVENTS**

**Grandma's Marathon, June 22, 2024:**  
<https://grandmasmarathon.com>.

## **ABOUT TWIN CITIES ARMA**

Twin Cities ARMA was established in 1958. It serves RIM professionals in Minneapolis & St. Paul, and greater Minnesota. The Chapter provides exceptional RIM training, education, and networking opportunities to its members.



**click [here](#) to learn more**



**TWIN CITIES  
PROGRAM**

# Dr. Patricia Franks

*Demystifying AI: Challenges and Solutions for Records and Information Managers*

**TUESDAY, MAY 14, 2024**

**1 - 2 PM EDT / 12 - 1 PM CDT / 10 - 11 AM PDT**



Click [here](#)  
to register!

## About the Program

Artificial intelligence (AI) and machine learning (ML) are no longer buzzwords. As AI/ML permeate IT transformation efforts, the hype is diminished as expectations rise. AI can improve core functions—including RIM—but may not be the right choice. Simple automation/workflow may be useful, but some situations need AI and ML solutions. This presentation will discuss challenges facing RIM managers and provide examples of how existing AI-enabled software/services can assist in capturing, managing, and preserving digital content. This presentation draws upon research conducted as part of InterPARES Trust AI and supported by the Social Sciences and Humanities Research Council of Canada.

## About Dr. Patricia Franks

Dr. Franks teaches Enterprise Content Management and Digital Preservation at SJSU. She is a CA, CRM, IGP, and CIGO. She is a member of ARMA's Company of Fellows, the CIGO Association Board of Directors, and Preservica's Digital Preservation Sustainability Council. She is a president of NAGARA, author of *Records and Information Management*, and editor or co-editor of numerous research publications including *The Handbook of Archival Practice*. Her research interests lie in emerging technologies, especially AI and blockchain technology, and their impact on RM and IG.

**ON MAY 15th TRAVEL TO**

# Jacksonville, FL



## ABOUT JACKSONVILLE

22 miles of beaches, world-class fishing, historic neighborhoods, family adventures, eclectic museums, vibrant street arts scene, creative coastal cuisine, and delicious craft beer!

## FUN FACT

Jacksonville has the largest urban park system in the nation with 80,000 acres of parks, including 405 city parks, 7 state parks, and 2 national parks.

## UPCOMING EVENTS

March 21st - Thirsty Thursday: Gather to catch up on RIM & IG topics. March 28th - Mayo Clinic in Florida: The First 35 Years, Virginia M Albright-Peterson, PhD will provide an overview of how Mayo Clinic came to Jacksonville.

## ABOUT ARMA JACKSONVILLE

Jacksonville chapter of ARMA is committed to providing educational and networking opportunities for Records and Information Management (RIM) and Information Governance (IG) professionals. Our goal is to provide these resources to boost programs.



click [here](#) to learn more

# Matt Kilboy

*Improving Business Outcomes with  
Intelligent Data Processing (IDP)*

WEDNESDAY, MAY 15, 2024

12 - 1 PM EDT / 11 AM - 12 PM CDT / 9 - 10 AM PDT



Click [here](#)  
to register!

## About the Program

According to an estimate from MIT, as much as 90% of data is unstructured, making critical information inaccessible.

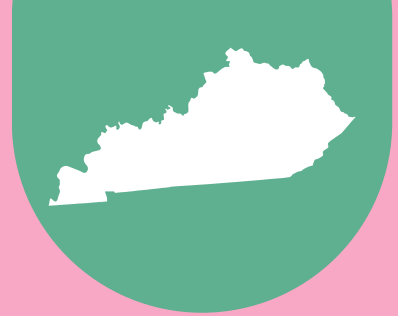
Organizations seek to modernize operations by adopting emerging technologies that support secure, flexible work environments. An IDP solution can extract useful information from both structured and unstructured documents. The result is process automation that is more than 50% faster and 30% less expensive than traditional scanning and OCR solutions. In this session, we will discuss how IDP is delivering greater efficiencies to business processes and unlocking the value of organizations' documents.

## About Matt Kilboy

Matt Kilboy is an experienced financial services leader dedicated to product design and process optimization solutions that identify and deliver unique customer experiences, enhanced operational efficiency and regulatory compliance. He nurtures solutions from the whiteboard through financial execution. Matt has developed and implemented differentiating product offerings for the nation's largest lenders, servicers, insurance providers and global BPO vendors. Over his thirty-year career, he has successfully delivered as an entrepreneur, corporate leader, and industry advisor.

**ON MAY 16th TRAVEL TO**

# **Kentucky**



## **ABOUT KENTUCKY**

**Kentucky is known for its culture, which includes horse racing, bourbon, moonshine, coal, My Old Kentucky Home State Park, Louisville Slugger bats, bluegrass music, and college sports.**

## **FUN FACT**

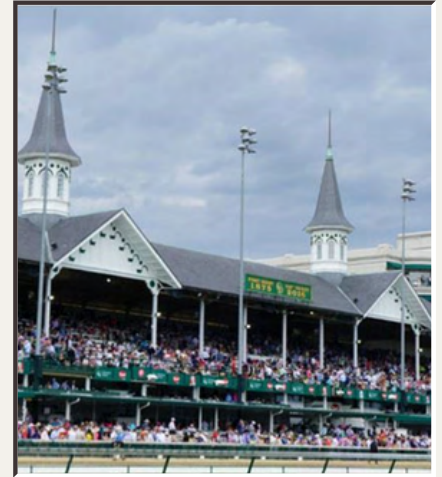
**Kentucky is home to the World Peace Bell and the Chevrolet Corvette.**

## **UPCOMING EVENTS**

**The Kentucky Derby, also known as the "Greatest Two Minutes in Sports" runs in Louisville every May.**

## **ABOUT ARMA KENTUCKY**

**In 2021, our Kentucky ARMA Chapters merged to create one Kentucky ARMA Chapter which offers educational programs based on industry standards, ARMA's GARP Principles and best practices.**



# Matt McMahan

*Developing and Implementing a Privacy  
Assessment Program*

**THURSDAY, MAY 16, 2024**

**12 - 1 PM EDT / 11 AM - 12 PM CDT / 9 - 10 AM PDT**

Click [here](#)  
to register  
via email!



## About the Program

Several states have passed comprehensive data privacy legislation and many others have passed more targeted legislation. The expectation from regulators is that organizations know what personal information they collect, understand the purpose of the data use, and dispose of the PI after the purpose for collection and use has lapsed. Records managers are in a strong position to support their organizations response to privacy laws. The challenge is that regulators rarely offer clear guidance on how to translate high level legal requirements into practice. In this presentation you will learn some tips and practices that can help you create and operationalize a privacy assessment program.

## About Matt McMahan

Matt McMahan is Program Director of Business Continuity and Data Integrity at Texas Roadhouse. He obtained his B.A. from UNC-Chapel Hill and his J.D. from Vanderbilt University. Originally in-house counsel at Texas Roadhouse, he was responsible for the management of litigation, responding to agency charges, records management, corporate-level contracts, marketing, and intellectual property. He currently focuses on records management, data privacy, enterprise risk management, insurance, business continuity and crisis planning, and incident response. Matt is married and has four children.

**ON MAY 21st TRAVEL TO**

# **Palmetto, SC**



## **ABOUT PALMETTO**

South Carolina is known for its warm temperatures, white sand beaches, parks, festivals, famed southern hospitality, rich culture, and flavorful cuisine.

## **FUN FACT**

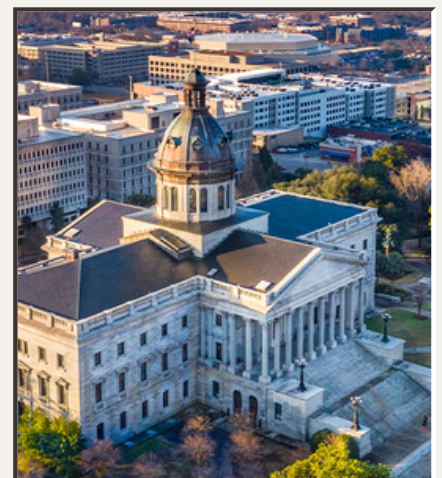
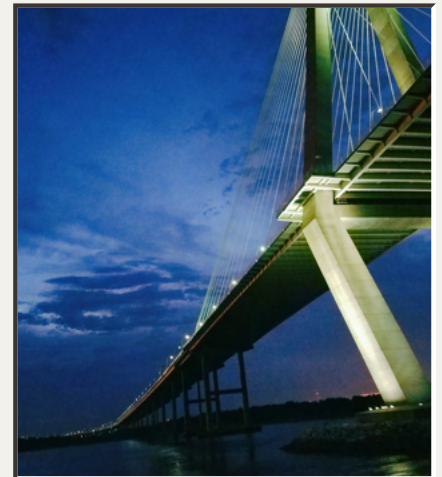
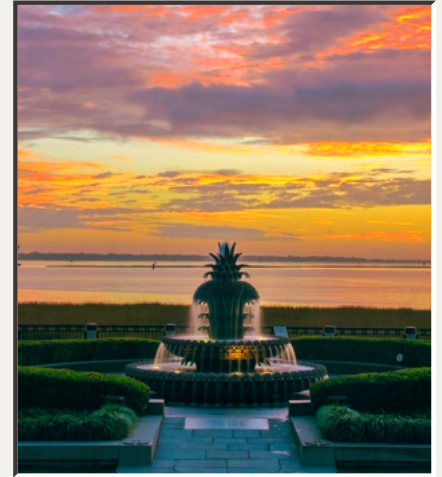
South Carolina is called “The Palmetto State” because of its large population of Sabal Palmetto trees.

## **UPCOMING EVENTS**

The Juneteenth Freedom Festival is a multi-day celebration featuring seminars, educational programs, and a two-day carnival at the State Fairgrounds featuring food, music, rides, games, exhibitors, and more.

## **ABOUT ARMA PALMETTO**

Est. in 2019, the Palmetto Chapter was formed by South Carolina Coastal, Greenville, Central Savannah River/Aiken & Columbia merging to better the member experience and elevate content. The chapter hosts quarterly hybrid meetings across the state.



[click here to learn more](#)

# Deborah Robbins

## *Before Disaster Hits*

**TUESDAY, MAY 21, 2024**

**12 - 1 PM EDT / 11 AM - 12 PM CDT / 9 - 10 AM PDT**

Click [here](#)  
to register!



## About the Program

In every geographical area of the world, there are disasters created by humans and nature. While each organization plans for evacuating buildings, protecting people and property, the same care, and attention to planning should be placed on the records of the organization. If information is an important asset, the planning for the protection of this asset prior to a disaster is paramount.

### Takeaways:

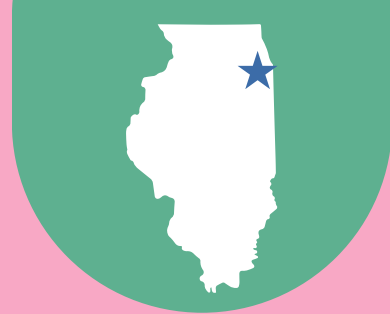
- Learn about risk assessment/mitigation, disaster plans and supplies, disaster team planning, salvage priorities, recovery efforts and resources.
- Form an understanding of a basic disaster management plan and what steps are needed to protect organizational assets when disaster strikes.

## About Deborah Robbins

Deborah Robbins, CRM, CIP has over 20 years of experience in the Records and Information Governance field, in federal, city, and county governments, legal, finance, education, utilities, and private sectors. She is the 2023 ICRM Member of the Year and leads a CRA/CRM online study group. Deborah has served as a frequent speaker on topics such as data mapping, compliance, change management, professional growth, and business continuity and disaster recovery.

**ON MAY 29th TRAVEL TO**

# **Chicago, IL**



## **ABOUT CHICAGO**

**Chicago was incorporated as a town in 1833 and as a city in 1837. The city is also known as The Windy City, Second City, The City of Broad Shoulders, and The City That Works.**

## **FUN FACT**

**The Twinkie was invented in Chicago during the Great Depression. It was originally filled with banana cream, but that was replaced by vanilla cream during World War II and remains so to this day.**

## **UPCOMING EVENTS**

**Chicago will host its second NASCAR race on Sunday, July 7: The Grant Park 165. The 2024 Democrat National Convention will be held in Chicago on August 19-22 at the United Center, home of the Chicago Bulls and Blackhawks.**

## **ABOUT ARMA CHICAGO**

**ARMA Chicago serves the RM and IG communities in Chicago and its surrounding suburbs. Its membership has produced nine past ARMA International presidents. Chicago has won the Chapter of the Year (COTY) Award six times.**



**[click here to learn more](#)**



**CHICAGO  
PROGRAM**

# Tom Corey

## *The IG Professional's Role in the AI and Data Privacy Revolution*

**TUESDAY, MAY 29, 2024**

**1 - 2 PM EDT / 12 - 1 PM CDT / 10 - 11 AM PDT**

Click [here](#)  
to register!



## About the Program

**Artificial Intelligence (AI) and Data Protection are hot topics, but they often seem at odds with each other. AI creates enormous possibilities, but privacy professionals are concerned about the source and use of data needed to create AI tools. Others, including Information Governance (IG) Professionals, are concerned about the future of their jobs. Topics will include: understanding the language of both AI and Data Professionals, identifying existing and new IG policies to address and incorporate AI and Data Privacy principles, and demonstrating how IG professionals will play a pivotal role in making AI a success while still protecting consumer data privacy interests.**

## About Tom Corey

**Tom Corey is a licensed attorney, Certified Records Manager, and Certified Privacy Professional employed by Harbor Global, LLC. Much of his work involves assisting organizations in developing IG policies, records retention schedules, and privacy programs that are compliant with domestic and international laws, regulations, and data privacy requirements. Tom has been published several times and is a two-time winner of ARMA's Britt Literary Award.**

# SPRING SEMINAR MANIA

## TRIVIA & NETWORKING FINALE EVENT

Extend your virtual vacation for another day by attending the Spring Seminar Mania II's event finale on Thursday, May 30, 2024, where we will play a records trivia game, network with each other, and announce grand finale door prize winners.

This year we will have a trivia contest during the Spring Seminar Mania Wrap-Up meeting. There will be four rounds of trivia and all questions will be based on both the sessions and the chapters that are presenting each session. The more sessions you attend, the better your chances of acing the trivia competition and winning a gift card. The gift cards that were generously donated by VRC will be awarded to the top contestants for each round of trivia. Please note that each contestant can only win one trivia gift card, regardless of their placement at subsequent trivia rounds. There is a 50 person limit to each trivia round.

**TRIVIA & GAMES • FABULOUS PRIZES**  
**MEET OTHER PROFESSIONALS**

# MAY 30

12:30 - 2 PM  
EDT

11:30 - 1 PM  
CDT

9:30 - 11 AM  
PDT

FREE

ONLINE

16 CHAPTERS

2 MONTHS



**Sign up today:**



[https://armamilwaukee.org/  
eventer/extendvacation4/](https://armamilwaukee.org/eventer/extendvacation4/)