

NIAGARA

INFORMATION SUMMIT 2016



AGENDA

Subject to Change

Sunday, April 10, 2016

4pm	Hotel guest check-in
5:30pm	Optional dinner at Benchmark, teaching restaurant at Niagara College Benchmark dinner is not included in event registration. Please email armaswo@gmail.com if you would like to attend. http://ncbenchmark.ca/

Monday, April 11, 2016

8-9am	Conference Registration Idea Loft foyer Breakfast Buffet Sunhill Dining Room
9-9:15am	Opening Remarks Clare Cameron President, ARMA Southwestern Ontario
9:15-10:15am	OPENING KEYNOTE Is it Positive? Understanding the Power of Knowledge Culture Ulla de Stricker President, de Stricker Associates Ulla de Stricker sets the stage for the summit by discussing the impact of an organization's approach to information, its regard for "optimal knowledge conditions" and internal behaviors. Understanding the prevailing perceptions about how worthwhile it is to invest in such optimal conditions is a key instrument in achieving positive impact on the organization's success, and in building professional influence. Ulla shares insights gained from decades working "the

	knowledge angle" as a consultant for all kinds of organizations and appeals to information professionals of any stripe to conceive of themselves as "agents of positivity" in nurturing productive information and knowledge cultures.
10:15-10:30am	Refreshment and Networking Break
10:30-11:15am	Building Local Voices: Knowledge Exchange, Community Engagement and Focused Planning for a Stronger Future in Niagara Mary Wiley Executive Director, Niagara Connects Niagaraknowledgeexchange.com (NKE) is a community-built tool to support focused planning for increased quality of life in Ontario's Niagara region. The NKE is based on the 12 Living in Niagara Sectors, which align with the Social Indicators of Health. The Niagara Connects network of people is pioneering a unique model for raising voices in Niagara through Community Engagement and Knowledge Transfer that leads to action and achieves impact. Join Niagara Connects Executive Director Mary Wiley, to learn how a team of Network Weavers, Research Associates and Knowledge Brokers guide the collaborative work of diverse players in the Niagara-wide community, and be better heard.
11:15-12pm	Establishing IM Awareness in Your Organization Trevor Banks National Coordinator IM Policy and Best Practices, Indigenous and Northern Affairs Canada All IM strategies outline the need to create an infrastructure for managing the corporation's most prized asset - its information. But strategic IM success also inevitably involves the end user more so than other conventional information changes, such as the installation of database upgrade. Our shared goal must therefore be to establish a culture that knows why the IM strategy has relevance to their everyday work; to explain what role users have in managing information; and to ultimately establish the desire to buy into the Strategy's goals in order to achieve organizational success. IM awareness is critical first step to enabling this change. If you don't have an IM awareness campaign, are you ready to launch one? And if you do have an IM awareness campaign, are you able to sustain it or does it need to improve? How does an awareness campaign fit within the more traditional structures of Communications or HR Training? Join Trevor as he walks through you a two part story. If the question is How are you going to promote awareness about IM issues and concerns in your department? Then the answer is: Part 1 – By understanding the difference between awareness and training and understanding the scope of work associated with promoting and sustaining awareness about IM issues and concerns Part 2 – By structuring your IM shop to be able to make IM Awareness work for your organization.
12-1pm	Lunch Sunhill Dining Room

1-1:45pm

Sales Spotlight I: Pitching RIM to Business Owners

Jane Lockard | President, National Records Management

Idea Loft

Jane presents a short introduction about “Selling Records Management,” based on her experiences as President of National Records Management (NRM) and participation at PRISM and NAID conventions. The differences between information interests for private business and public corporations due to legislation will also be explored. Finally, Jane will share a case study on NRM and how the company has evolved to address RIM needs, and lessons learned from “selling” RIM in the Niagara area. Jane concludes with an interactive checklist for “pitching” RIM to the IT department and the executive level of an organization.

Sales Spotlight II: Pitching Records and Information Management to Outsiders

Chris Perram | President, Perram Consulting

Studios 4-6

1:45-2:30pm

Protect Records through Process Automation

Chris Wynder | Director of Client Services, ThinkDox

One of the glaring problems facing organizations as they move from paper records to electronic records is control of access to sensitive information. While much emphasis has been placed on the classification and rights management piece of records security, breaches are still relatively common. This stems from the fact that unlike paper, e-records cannot be separated from the normal documents. Most workers require both to do their job. In order to protect records in the cloud and mobile era, where several copies exist across device and systems, organizations must integrate user experience and process automation into their information management procedures.

2:30-3pm

Energizing Break | Idea Loft

Refreshment and Networking Break

3-4pm

PANEL

The elephant in the server room? Gender Dynamics and the Information Profession(s)

Moderated by Ruth Unrau | Focus Coach

Helen Kennedy, CRM | Supervisor of Information Services, County of Brant

This session will focus on communication styles, career expectations and gender. Is the information profession gender-neutral, and if so, is this its intended and desired state?

Panelists will explore the hypothesis that the information workplace is gender-neutral and gender has no influence on how we are perceived in our work.

Using science-backed studies as well as stories from the trenches, the session will explore the implications of this statement and examine some potential strategies to ensure that workplace interactions and communications are respectful and successful. Follow-up challenge: is this session gender-neutral or is it influenced by the gender demographic, a.k.a. is there an elephant in the conference room too?

4-4:15

Summary and Closing

5-6pm

Dinner | Sunhill Dining Room

Dinner is included for all full two-day event registrants.

6-9pm

Optional Evening in Old Town, Niagara-on-the-Lake

Pre-Registration Required | Shuttle departs White Oaks at 6pm sharp.

Experience games night with tea, coffee and dessert at the pre-Confederation Charles Hotel, constructed in 1832. Then come along for a visit to the Olde Angel Inn, first established in 1789. See if you can spot the famous ghost of Captain Swayze in our midst! Spouses welcome. Register on Eventbrite.

<http://www.niagarasfinest.com/properties/charleshotel/>

<http://www.angel-inn.com/home.php>

Tuesday, April 12, 2016

8-9:30am	Breakfast with the ARMA SWO Board Sunhill Dining Room Learn more about ARMA SWO membership, its Board of Directors and goals for 2016-17 (or just enjoy a delicious buffet!) Members of the Executive and Directors at Large will be available to answer any questions you may have about ARMA and the local chapter.
9-12pm	Freedom of Information and Records Management (FOIRM) Studios 4-6 ARMA SWO is pleased to welcome the Niagara-Halton Freedom of Information and Records Management (FOIRM) group, hosting their Spring meeting in Studios 4-6. All summit registrants are invited to drop in, observe and participate in the meeting, which will cover a wide range of topics on access to information, privacy protection and records management for public institutions.
9:30-10am	RIM: The Key to Organizational Efficiency & Effectiveness Paul Shipway CAO, Municipality of Bayham Paul offers a contemporary assessment of current day prime concerns for Senior Staff in municipal corporations, including exploring perceptions of why RIM tends to be undervalued in organizations. How can we build an effective RIM-based business case for success, and what are the most common hurdles we will face? Paul will demonstrate the importance of treating RIM as the organization's 'most important employee,' whether large or small; and provide examples of proven and practical RIM efficiency in making organizations more effective overall.
10-11am	From the Basics to an ECM: Revealing the secrets hiding in your content Ilidia Sa Melo Manager, IM and Archives, City of Cambridge Whether introducing new employees to the basics of records and information management, or managing a large project team through the implementation of a fully integrated ECM, training, understanding and awareness are critical to success. Ilidia shares insights, experiences and practical examples in this case study session on current developments in IM at the City of Cambridge, and how the hidden power in their organizational content is gradually being unlocked.
11-11:15am	Refreshment and Networking Break
11:15-12pm	Leveraging Social and Emotional Intelligence for Career Success Terry Pruner Professor and Entrepreneur, The Training Department Inc. Why is it that so many people have great technical skills, but as a result of poor soft skills they hit the glass ceiling early? In this fun and introspective session you will learn about the power of emotional and social intelligence and how understanding your self and others can have hugely positive career impacts! Participants will be asked to complete a short Personal Style Inventory during the session.
12-1pm	Lunch Sunhill Dining Room

1-1:45pm

Hot Topic I: Using Standards to Build the Business Case for Digital Preservation Idea Loft

Lori Ashley | Principal Consultant, Tournesol Consulting, LLC

Charles Dollar | Principal Consultant, Dollar Consulting

This session describes the Digital Preservation Capability Maturity Model within the context of three international standards (ISO 14721, ISO 16363 and ISO 31000) that can be used to build a business case to ensure that long-term (10+ years) digital assets remain accessible, usable, and trustworthy for as long as necessary. This session will help you to make better decisions on the value, costs, and risks associated with your information assets, and how to use this topic in building the case for strong and effective information management.

Hot Topic II: Speaking to the Digital Preservation Landscape in Ontario Universities | Studios4-6

Jeremy Heil | Digital and Private Records Archivist, Queen's University Archives

Loryl MacDonald | University Archivist, University of Toronto Archives

University Archives are increasingly tasked with taking on a leadership role in digital preservation within their respective institutions. Staffing and expertise do not necessarily reflect the enormity of this task, and developing a collaborative environment is key to preservation success. This session will examine how digital preservation and digitization planning and practice has developed at Queen's University and the University of Toronto, exploring the successes and failures along the way, as well as the tangible lessons learned and next steps.

1:45-2pm

Refreshment and Networking Break

2-3pm

CLOSING KEYNOTE

Your New Lenses Are Ready For Pick Up: Harnessing the Powers Of A Positive Mindset By Seeing Changes & Challenges In A New "Light"

Susan Stewart | Comedian and Speaker

This lighthearted program explores the powerful role our perceptions and thoughts play in determining our experiences and shaping our reality and offers ways to meet changes and challenges with a positive outlook. You will take away insights, ideas, and techniques that will help you be resilient and experience the personal and professional benefits of a positive mindset.

3-3:15pm

Door Prizes and Closing Remarks

Anne Hepplewhite | President Elect, ARMA Southwestern Ontario

Speakers

Lori J. Ashley



Lori J. Ashley is an independent consultant and educator dedicated to helping public and private sector organizations improve the performance of their record and information management (RIM) practices. An experienced business strategist and organizational development specialist, Ms. Ashley has a passion for developing cross-functional approaches to jumpstart and sustain collaboration among stakeholders who share accountability for effective and efficient life cycle controls of valued records and information assets. Ms. Ashley is President-Elect of the ARMA Madison (WI) chapter and a member of the Society of American Archivists.

Website: www.securelyrooted.com

Trevor Banks



Trevor Banks, an IM professional and adult educator with over 20 years' experience in Canadian federal government IM programs, has specific expertise in the realities and practicalities of leading IM Awareness and Training initiatives. In 2006, he established, and continues to chair a Government wide community of practice on IM awareness and training (IM AT COP). He has a passion for helping the IM community to create better awareness and training responses when engaging employees on their IM responsibilities.

Twitter: @BanksTrevor

Charles Dollar



Charles M. Dollar is an internationally recognized thought leader and writer with more than three decades of knowledge and experience managing electronic records in a variety of organizational and technological environments. Mr. Dollar is an active member and Fellow of the Society of American Archivists and the Association of Information and Image Management, and a recipient of the Emmett Leahy Award for Outstanding Contributions to the Records and Information Management Profession. He is a co-developer with Lori Ashley of the Digital Preservation Capability Maturity Model (DPCMM).

Jeremy Heil

Jeremy Heil has been the Digital and Private Records Archivist at Queen's University Archives since 2001, holding a Master of Archival Studies degree from the University of British Columbia and a B.A. (Honours) in History and Visual Arts from Brock University. He was formerly employed as an archivist with the Chung Collection in Vancouver, and at the Provincial Archives of Alberta. Jeremy is a former president of the Archives Association of Ontario, and currently serves as the Managing Editor of Archivaria. He has taught workshops on digital preservation, and has published and presented papers on various archival topics.

Twitter: @thearchivist13

Helen Kennedy



Helen Kennedy, CRM has worked in the information profession for over twenty years as a Records Clerk, Records Co-ordinator, FOI Co-Ordinator and most recently as a Supervisor of Information Services. Holding various qualifications in Records Management, Access and Privacy, Project Management and Human Resources, Helen is also an Accredited Municipal Clerk/Treasurer, past President of ARMA SWO and very active in AMCTO on the organizing group for the annual Access and Privacy Forum since its inception.

Helen's greatest qualification has come from becoming her own overnight and almost entirely accidental success story, having started working part-time as a hotel chambermaid (yes, that was the official job title) and held what we refer to in resume-speak as "progressively responsible positions" in hospitality services, auto sales and finally in the critical service area of information management for municipal government.

Jane Lockard

As a local business owner, Jane Lockard is responsible for the management and profitability of her company National Records Management. This corporate group has now transitioned to the third generation, entering its 65th year since inception. Over these years, Jane has overseen the diversification of product lines and operational locations. Records management has always been of utmost importance throughout, to fulfill government requirements and to assist in predicting the future of the business. Over 65 years of operations, National Records Management and its staff have gained RIM experience in different countries, jurisdictions, and organizations.

Loryl MacDonald

Loryl MacDonald is the University Archivist at the University of Toronto. Prior to her appointment, she was a records archivist at the University of Toronto Archives from 2000 to 2012. Loryl is past president of the Association of Canadian Archivists, the Archives Association of Ontario, and the Toronto Area Archivists' Group. She teaches the graduate course, Legal Issues in Archives, at the University of Toronto's Faculty of Information. Loryl holds both a Bachelor of Laws and a Master of Archival Studies from the University of British Columbia.

Terry Pruner



Business Professor and entrepreneur, Terry has spent the last 15 years developing tomorrow's leaders in the college classroom while working with executives in some of today's most recognizable organizations. He is recognized as an industry expert in managing business relationships and has spoken to hundreds of audiences about how to improve and leverage relationships in the workplace. His academic credentials and "real world" experience, combined with a clear and entertaining delivery style makes Terry a fun and engaging speaker.

Twitter: @terrypruner

Ilidia Sa Melo



Ilidia started her career in Municipal Government in 1990 with the Regional Municipality of Waterloo, coming from a financial background. She focused on Records Management and joined the Clerk's Division, obtaining the AMCT and CMO Designations. Ilidia currently holds the position of Deputy City Clerk, Manager of Information Management & Archives at the City of Cambridge; this role includes administering all Information Management for the organization including Archives, Records Management and Freedom of Information. Ilidia has participated in many speaking engagements throughout southwestern Ontario on various Municipal initiatives including focus groups at the Association of Municipal Managers, Clerks and Treasures of Ontario.

Paul Shipway

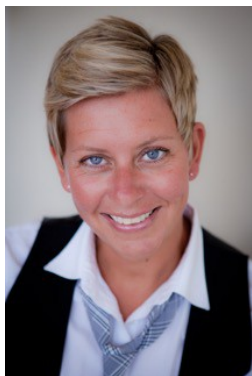


Paul Shipway is a Certified Municipal Officer (CMO) and currently serves as the CAO of the Municipality of Bayham. Paul previously served as Deputy Clerk in the Township of Uxbridge and the Municipality of McKellar and is educated via The University of Western Ontario.

Paul is a firm believer in local government and the concept of collectively accomplishing what cannot be accomplished as individuals. Paul is a champion of automation and the incorporation of computer and information technology in Municipal Administration.

Twitter: @shipster88

Susan Stewart



Susan Stewart is a comedian, author, and speaker who shares the art and practice of seeing the lighter side of life. Susan is the author of "Reaching The Laugh Resort" and "Your New Lenses Are Ready For Pick Up: A Guide To Seeing The Lighter Side Of Life". Susan is also the co-author of "From The Stage To The Page: Life Lessons From Four Funny Ladies." You can learn more about Susan at www.susanstewart.ca.

Twitter: @SusanIStewart

Ulla de Stricker



Ulla de Stricker's consulting practice (www.destricker.com) focuses on assisting clients to address challenges and opportunities related to the ways in which tangible information and intangible knowledge get discovered, shared, applied, and protected for future use. Ulla is the author of several professional books and has written extensively on the impact of organizational culture on the success of information and knowledge related activities. She is known as an engaging and inspirational speaker who has her audience members realizing there are novel ways to think about their professional activities.

LinkedIn: [linkedin.com/in/destricker](https://www.linkedin.com/in/destricker)

Ruth Unrau



Ruth Unrau is a Focus Coach, a speaker and a facilitator. As a coach, Ruth works with leaders in business to develop their strengths and build confidence to achieve peak performance. Ruth is a strong voice for women. She is the co-founder of Women in Niagara Council and is currently serving as the chair and is also as a Board Member for the Greater Niagara Chamber of Commerce. Ruth is an active and dedicated volunteer and believes that strong communities are built by individuals who express their ideas, get involved and take action.

Twitter: @ruthunrau

Mary Wiley



Mary Wiley is Executive Director of Niagara Connects - a Niagara-wide network of people who collaborate to plan, learn, innovate and lead community action toward a stronger future for Niagara.

Mary studied Family and Consumer studies at the University of Guelph. Prior to joining Niagara Connects, she worked in Canada's agri-food industry, focusing on knowledge transfer and marketing communications in the areas of: informed decision-making for healthy lifestyles; business and value chain development; environmental stewardship; government relations; and organization leadership.

Twitter: @Niagaraconnects and @MWcommunicates

Chris Wynder

Christopher (Chris) Wynder is the Director of Client Services for ThinkDox. He provides information management strategy and implementation management services. He provides guidance on issues of governance, technology selection and regulatory obligations.

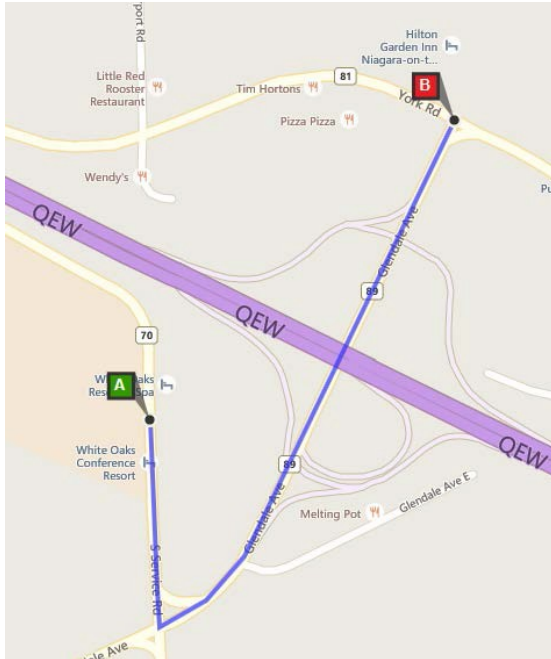
@ChrisW_thinkdox

Logistics

Hotel Accommodation

White Oaks Resort and Spa (A)

A block of Superior Rooms are available for April 10 and 11 under “ARMA Southwestern Ontario” at the group rate of \$145/night. Please book directly by contacting the White Oaks reservation desk at 1-800-263-5766. Rooms must be reserved before March 1, 2016 in order to secure the group rate.



Hilton Garden Inn(B)

Located a very short drive from White Oaks, group rates are available for April 10 and 11 under “ARMA Southwestern Ontario” for \$99/night. Please book directly by contacting the Hilton Garden Inn at 905-984-4200. Rooms must be reserved before March 1, 2016 in order to secure the group rate.

Old Town Niagara-on-the-Lake

Historic Old Town in Niagara-on-the-Lake offers a wide variety of accommodations, located approximately 15 minutes by car from White Oaks Resort and Spa. Visit the following for more information, and enjoy your stay!

Vintage Hotels <http://www.vintage-hotels.com/>

Niagara's Finest Hotels <http://www.niagarasfinest.com/>

124 on Queen Hotel & Spa <http://124queen.com/>

Best Western Col. Butler Inn <http://www.colonelbutlerinn.com/>

Bed and Breakfast Assn. <http://www.niagarabedandbreakfasts.com/accommodations/>

Parking

Parking is available free of charge at White Oaks Resort and Spa.

Social Media

Promote your participation in the Niagara Information Summit 2016 using the hashtag #InfoSpeaks and our local chapter handle @ARMASWO. Throughout the event itself, #InfoSpeaks tweets will be posted to all participants using www.visibletweets.com.

Allergies and Dietary Requirements

Breakfast, lunch and dinner are served buffet-style, with a wide variety of foods available to accommodate allergies, dietary restrictions and requirements. Please contact armaswo@gmail.com in advance of the event to submit any questions, concerns or requests related to food service at White Oaks.

Participant List