







ARMA Pacific Region Leadership Team 2014 - 2015

Region Director – David Fleming	
Region Advisor Education and Programs Eleanor Ozaeta	
Region Advisor Marketing & Communications Charlie Sodano	
Region Advisor Operations Tracie Mukai	
Region Treasurer Judy Clingerman	
Past Region Advisor Pilar McAdam	



2014 ARMA Pacific Region Leadership Conference!

Sonoma, California
Sonoma Valley Inn
July 10-12, 2014

“Hear it on the Grape Vine”



Hosted by
ARMA Mt Diablo and Greater
Sacramento Chapters

PLATINUM SPONSOR



CHAPTER SPONSORS



What matters most?

When it comes to your information management program what matters most to you?

We think you will agree, it's access: secure and compliant, yet fast and convenient for you.

The right choice for you?
It's Access.

Access serves organizations throughout the United States and in Latin America.

Call us today at 1 877 FileLine or visit us at InformationProtected.com/ARMA-Today to see how you can take full advantage of our latest offers and to arrange your FREE consultation and quote.



InformationProtected.com
1 877 FileLine

Access to, storage, management and destruction of both paper and digitally based information. Nationwide.



Arizona
Greater Los Angeles
Greater Sacramento
Hawaii
Mt Diablo
San Diego
Silicon Valley
Silver State

BRONZE SPONSOR



SILVER SPONSORS



AMERICAN SHREDDING
A Document Destruction Company

Paper Shredding Service, Hard Drive Destruction! Call us at 888 777 2099!!



recall
Your Information, Securely Managed.

Effectively and securely manage your physical and digital information with Recall

With Recall, you're covered when it comes to:

- Governance
- Digital Conversion
- Document Storage
- Data Backup & Recovery
- Secure Destruction
- Business Process Automation

To learn more about Recall, contact Jen Farnham, Sales Executive - 510.600.8597 - jen.farnham@recall.com or Call 888-732-2556

Visit recall.com

©2014 Recall Holdings Limited. All rights reserved. Other trademarks, registered trademarks, product names, and company names or logos are the property of their respective owners.



SHRED WORKS

Did you know...
we offer more than just shredding?

Document Scanning & Storage e-Waste Recycling Junk Removal

Guest Speaker: Helen Streck



A partner at Kaizen InfoSource, LLC. Helen's expertise in records and information management has its foundation in real world experiences forged from a career in the business that spans over 25 years. Helen and her team leverage a unique blend of industry resources and expertise to guide clients in all aspects of records and information

management including compliance programs, program strategy development, development and implementation of litigation hold protocols, electronic discovery response plans, data privacy initiatives, and selection and implementation of technologies to support these services.

Prior to joining Kaizen InfoSource, Helen served as records management consultant in Shook, Hardy & Bacon's Tort Section working with lawyers from the SHB eDiscovery, Data & Document Management Practice. She was the director of corporate records and information management for Amgen, Inc., and records and contract manager at Genentech Inc. Helen's experience includes designing corporate level records and information management programs to meet regulatory, legal and company requirements. Helen has crafted record governance strategies for diverse organizations and built concrete, actionable steps for implementation across a broad spectrum of businesses in multiple countries.

DIAMOND SPONSOR



IRON MOUNTAIN
INFORMATION IS EVERYTHING

INFORMATION IS...
EVERYWHERE

Information is the lifeline of your business. Get it under control with the help of Iron Mountain.
ironmountain.com/bestpractices

Michael Avery - Chief Operating Officer for ARMA International



Michael Avery joined ARMA International as its COO in November of 2012 and was previously, the Director of Education for the National Auctioneers Association. He has spent over 25 years creating and developing education for Fortune

500 companies and not-for-profit associations. He sold his for-profit training consultant company, Avery Training International, in 2001 after 10 years in the business and has since dedicated himself to the not-for-profit community.

Michael has held three CEO positions including three years as the CEO of a housing development company and he also conducts benefit auctions. He has been a cowboy, a merchant mariner, and entertainer. He has worked with the CIA, the US State Department, the National Security Agency, and the FBI. He also trained Disney Imagineers, NASA project managers, US military officers, and representatives of the World Bank. His focus on leadership, management, and customer service made him the top-rated public speaker for the American Management Association.

Marc Simpson

Marc is a long-time member of ARMA and was elected to the ARMA International Board of Directors in 2013 after serving for four years as Region Manager and two years as Region Treasurer for the Great Northwest Region. Marc has been with Pierce County Public Works and Utilities for over 18 years and is a member of the Puget Sound Chapter (Tacoma Area).

GOLD SPONSORS

ENTERPRISE INFORMATION
MANAGEMENT EXPERTS



DOCULABS

DOCULABS.COM

Huron Legal helps organizations
plan and implement strategic
records and information
management initiatives.

- Information Governance • Assessments/Strategic Planning
- Electronic Records Management • Change Management

HuronLegal

See Things Differently.

1-866-229-8700 | huronconsultinggroup.com/legal

© 2014 Huron Consulting Group Inc. All Rights Reserved.



Conference Program

Thursday, July 10	
2:00 - 4:00	Region Advisory Board Meeting
5:30 - 7:00	Reception at Sonoma Valley Inn <i>Sponsored by Participating Chapters</i> Come meet old friends and make new ones!
Friday, July 11	
7:30 - 8:15	Registration Breakfast and Networking <i>Sponsored by Doculabs</i>
8:15 - 8:30	Welcome and Orientation Cathy Sparks, Mt. Diablo Chapter President Javier Sanchez, Sacramento Chapter President David Fleming, Pacific Region Director
8:30 - 10:00	Leading Your Chapter as a Team Helen Streck, Honored Guest and Region Star
10:00 - 10:15	A.M. Break <i>Sponsored by American Shredding</i>
10:15 - 11:30	Table Breakout Session #1 Chapter Maintenance – The Good, The Bad and the Mundane. Facilitators: Judy Clingerman & Pilar McAdam
11:30 - 1:00	Lunch <i>Sponsored by Iron Mountain</i> Update from AIEF
1:00 - 3:00	Leading Change in Your Information Governance Community Michael Avery, COO, ARMA International
3:00 - 3:15	P.M. Break <i>Sponsored by Recall</i>
3:15 - 4:30	Table Breakout Session #2 Marketing, Promotion and Member Management – Raising Your Chapter's Profile Facilitators: Charlie Sodano & Traci Mukai
4:30 - 4:45	Closing Remarks – Leadership Team
5:25 - 5:40	Gather for Walk to Dinner
6:00	Dinner at the Depot Hotel Hosted by the Mt. Diablo and Greater Sacramento Chapters <i>Sponsored by Access</i>

DIAMOND SPONSOR

rsd™ Your Information. Governed.

rsd GLASS® makes information governance **achievable**

SIMPLE PROFITABLE REPEATABLE ACCOUNTABLE FLEXIBLE MEASURABLE

SharePoint
Shared Drives
Physical Records
eDiscovery & Litigation Hold
Defensible Disposition
Policy Enablement
Archiving

www.rsd.com

IGA
THE GOLDEN RULE OF INFORMATION GOVERNANCE

Conference Program

Saturday, July 12	
7:30 - 8:15	Breakfast and Networking <i>Sponsor HuronLegal</i>
8:15 - 9:15	Update from ARMA Board of Directors Marc Simpson , Director, ARMA International
9:15 - 10:15	Update from ARMA Headquarters Michael Avery , COO, ARMA International
10:15 - 10:30	A.M. Break <i>Sponsored by Shredworks</i>
10:30 - 11:45	Table Breakout Session #3 HQ and Board Presentation Feedback Facilitators: David Fleming, Michael Avery & Marc Simpson
11:45 - 1:15	Lunch <i>Sponsored by RSD</i> Awards and Recognition
1:15 - 2:30	Table Breakout Session #4 Chapter Programming & Seminars – Successes, Surprises, Themes, Planning, Big Ideas, and Big Flops. Facilitators: Eleanor Ozaeta & Tracie Mukai
2:30 - 3:00	Closing Remarks and Thank You Leadership Team