



Records and Information Management (RIM) Symposium for Municipal Clerks

Announcing a Symposium for Municipal Clerks focused on one of the most important RIM issues faced today: Electronically Stored Information (also known as “Electronic Records”); what to do with them, how to manage them, how to safeguard them.

Three experts will present information especially geared towards the needs of City Clerks.

Helen Streck: **A 5-Step Approach to Implementing Technology and Migrating Data**

Marti Fischer: **Data Privacy and Cyber Security: the Need for Protection**

Deva Marie Proto: **Office Efficiencies – Systems, Automation and Digitization**

When: Thursday, March 30, 2017 – 8:00 am – 2:00 pm, Breakfast and lunch included

Where: San Ramon City Hall, 7000 Bollinger Canyon Road, San Ramon, CA 94583

Qualifies for 3 Continuing Education Credits by IIMC (preapproval pending)

Compliments of Mt Diablo Chapter of ARMA International (i.e., no charge)

Please [RSVP](#) to ARMA Mt Diablo by Monday, March 27th.

A RIM Symposium for City Clerks, Details:

Session Title: A 5-Step Approach to Implementing Technology and Migrating Data

When employees are told they are going to implement or upgrade to a new system for managing information, they are often asked what features do they need of the system and what data is migrated from the old system or locations. If you haven't been part of the design team, you might need more information or you may need to give them requirements to ensure that the information you need is added to the new system and you can begin using it day one.

This session will discuss how to get your requirements included in the design, how good Information Governance, done first, has a positive impact, and how to make the determination about what data needs to be migrated.

Speaker: Helen Streck / President and CEO, Kaizen InfoSource

Ms. Streck has 30 years of experience in Records and Information Management program strategy, design, and implementation for both private corporations and public entities. Streck has also been deposed four times and interviewed by the U.S. Attorney's office for describing and defending her RIM Program designs and practices. She has served as director of corporate records and information management for pharmaceutical companies, and Records Manager and consultant for municipal government agencies and law firms. She has crafted information management program strategies for diverse organizations and built concrete, actionable steps for implementation across a broad spectrum of domestic and international clients. Streck is active in ARMA International where she is a presenter for ARMA at international conferences. In addition, she has published articles in various professional newsletters, and is a past columnist for the monthly AIIM Infonomics magazine for the Association for Information and Image Management (AIIM), and a contributor to the ERM Community of AIIM.

Session Title: Data Privacy and Cyber Security: the Need for Protection

All organizations rely on their information assets to ensure the ability to function efficiently and effectively. This truism applies as much to the public sector as to the private. While these assets require protection, it appears that they have increasingly come under assault, even at the highest levels of government. Clearly, more must be done to guard these assets from the various threats that compromise them. This presentation will address the inter-related issues of data privacy and security. The presentation will provide some historical context and also practical considerations for protecting these assets.

Speaker: Marti Fischer, CRM, FAI

Ms. Fischer has worked as an operational risk consultant with Wells Fargo Bank's Information Risk Management (IRM) team since 2006. Prior, from 1999 to 2006, she was a program manager for Iron Mountain's Consulting Services, where she worked with her clients to develop credible records management programs.

Ms. Fischer has over 36 years of records management experience. Prior to her consulting activities, she was Records Manager for The Bank of California (now Union Bank).

Ms. Fischer holds a Bachelor's Degree in History from Mills College and a Master's Degree in Library Science from the University of California, Berkeley. She is a Certified Records Manager, and has been a member of ARMA International for over 36 years.

Ms. Fischer was inducted into the Company of Fellows of ARMA International in October of 2000.

Session Title: Office Efficiencies – Systems, Automation and Digitization

The Sonoma County Clerk-Recorder's Office has created many efficiencies over the last 3 years, optimizing the use of their consolidated Clerk-Recorder system. The office transitioned from five stand-alone document management systems (for different types of records) to one consolidated system that ties in receipting, workflow and forms. They have created numerous forms within the system, created printed labels to replace hand stamps and signatures, and digitized their multiple office manuals to make them searchable and cross referenced. Deva Marie Proto will be discussing some of the specific ways the Clerk-Recorder's Office has leveraged technology to minimize repetitive movement of staff, serve the public faster and better, and create better record keeping and workflow.

Speaker: Deva Marie Proto

Deva Marie Proto has been the Chief Deputy Clerk-Recorder at the County of Sonoma since 2013. She graduated from Sonoma State University with her BA in Communications in 2004 and joined the County of Sonoma as a Senior Office Assistant, Human Resources Department in 2006. She joined the Clerk-Recorder-Assessor Department as a Department Analyst in 2009 and received her Master's in Public Administration from Sonoma State University in 2012. Her current responsibilities include administrative and operational management of the County Clerk and Recorder functions of department (recorded land and finance documents; birth, death, and marriage records; marriage licenses and ceremonies; fictitious business name statements; and notary public registration). She is involved with the California Association of Clerks and Elected Officials (CACEO) and the County Records' Association of California (CRAC), and is involved with the Legislative Committees of both associations. Under her leadership, Sonoma County recently won a Tyler Technologies Excellence Award for innovation based upon a successful pilot project with the California Department of Public Health to digitize staff signatures on marriage licenses.