



ARMA Vancouver Island
Full Day Event
Monday, September 18, 2017

8:45 - 4:00 pm

River Room

Vancouver Island Conference Centre (www.viconference.com)

Nanaimo

Managing Electronic Records

Join us for our 5th annual Information Governance and Records Management educational event!

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| 8:45 - 9:00 | Registration & Caffeine |
| 9:00 – 9:10 | Welcome |
| 9:10 – 10:10 | A Digital Journey - Dr Know and the Sunshine Coast Regional District - Anne Rathbone and Jordan Uytterhagen |
| 10:10 – 10:40 | Calories & Caffeine |
| 10:40 – 11:50 | Life After Paper: Selecting an Automated Records System - Brenda Prowse |
| 11:50 – 12:50 | Lunch (provided) |
| 12:50 – 1:50 | Introduction to Managing Information Risk - Jill Teasley & Edwin Yau |
| 1:50 – 2:20 | Calories & Caffeine |
| 2:20 – 3:20 | Regaining the Rights to Records: Trusted Online Access to Distributed Digital Holdings - Michelle Spelay |
| 3:20 – 3:50 | eRecords Comments, Concerns & Questions |
| 3:50 - 4:00 | Closing |

The fee for this event, including lunch, is \$125 for ARMA members and \$150 for non-ARMA members.

Please contact Ken Oldenburger at koconsult@shaw.ca with any questions you have, to let us know about any dietary restrictions or for more information about carpooling to the event.

Register at <https://www.eventbrite.ca/o/arma-vancouver-island-3388969884>.

Deadline is September 10th.

Sessions

“A Digital Journey - Dr Know and the Sunshine Coast Regional District” - Anne Rathbone and Jordan Uytterhagen - In 2014, the Sunshine Coast Regional District (SCRD) set an ambitious goal - to purchase and successfully implement an electronic document and records management system (EDRMS) within 1 year. This session will discuss a case study that includes: the development of the request for proposal (RFP) and selection process; the change management for staff, including branding the EDRMS as Dr Know; the software configuration and implementation; and the lessons learned. Follow the SCRD’s digital journey from smooth sailing to stormy seas, as told by two of the travel guides – the consultant implementing the software and the SCRD’s records management technician.

“Life After Paper: Selecting an Automated Records System” - Brenda Prowse - Are you feeling at a loss about making the leap into selecting an automated records tool? This session will help you wade through the process. From requirements gathering to the RFP process, you will be given practical information on how to begin making your selection. Attendees should leave with a higher level of understanding of the steps involved in obtaining an automated records solution.

“Introduction to Managing Information Risk” - Jill Teasley & Edwin Yau - Records and information management (RIM) practitioners are often advised to follow risk management principles to assess information-related risks and prioritize their treatment, but they may not have had exposure to formal risk management methods and practices. This session is intended to help increase RIM practitioners’ knowledge of the application of risk management to the RIM discipline by: Providing an overview of risk management as a discipline and how it relates to various aspects of records and information management; Presenting a practical approach to risk management; And discussing a case study demonstrating the application of a risk management approach to information management.

“Regaining the Rights to Records: Trusted Online Access to Distributed Digital Holdings” - Michele Spelay - The degree of openness of digital government records can often leave records professionals juggling security, transparency and privacy. This is further complicated when records have not been transferred into archival custody, but rather remain with the creating agency. In a time where open government and easy online access to information is expected, do government archives have a leadership role to play in ensuring that public records held outside archival custody are accessible? Citizens should have access to all appropriate public sector information regardless of format or location, and should not have to search the websites of multiple individual agencies to find what they are looking for. How, then, can we make distributed digital holdings available to the public in a user-friendly way while still protecting record integrity and personal privacy? This question involves two parts: first we must address the technical requirements for enabling access, ideally in a "one stop shop" model; and second, we must disrupt the cultural barriers surrounding access to digital records and encourage government agencies to actively make records available rather than wait for requests. Success in achieving this vision will rely on the use of standardized metadata, a commitment to proactive release of public sector information, consistent approaches to redaction and rendering of records for public use and the creation and maintenance of search and discovery systems that can harvest metadata and resources across governments. This session explores these questions

through a comparative analysis of Australasian government record keeping and suggests that New Zealand sets the precedent for access to digital government records in distributed custody.

"eRecord issues, questions, concerns!" – A time to bring your concerns, questions and issues with and about electronic records and electronic records management. Since we have a number of skilled and experienced speakers, we are going to squeeze every drop of information and knowledge out of them!

Biographies

Brenda Prowse has worked in the IM field since 1992 after obtaining her Master of Library and Information Science (MLIS) from the University of Western Ontario. Her career began at that time with the NL Provincial Department of Justice as a Records Analyst. Since then she has been employed in such roles as: Information Policy Analyst, Development Officer (Records and Information Management), Records Administrator, and Business Analyst within such entities as government, educational institutions and the private sector. In 2003 she started her own company, Continuum Consulting, which mainly provided support and services on TRIM Products throughout Atlantic Canada. In 2005, Brenda joined TOWER Software in Virginia as a Business Analyst implementing software solutions throughout North America. During her tenure at TOWER, Brenda began working on her CRM designation which she successfully obtained in July 2008. Brenda is currently the Director of Professional Services and IM with Prima Information Solutions in St. John's.

Anne Rathbone is a Certified Records Manager and published author. She is a frequent speaker at local and national ARMA events and is always happy to share the knowledge she has gained over her 21 year career in information management. As the Records Management Technician (and RM Goddess) for the Sunshine Coast Regional District (SCRD), Anne took a lead role in restructuring their shared drive and implementing an electronic document and records management system (EDRMS). She developed and provides ongoing training to all SCR D staff in information management policies and procedures as well as in the use of the EDRMS.

Jordan Uytterhagen is the Managing Director, Cadence Solutions and has over 10 years of experience implementing ECM & contract management solutions as Project Manager, Solution Architect, and a Business Analyst. These projects included verticals such as document and records management with electronic and physical records, automating business processes and complex system integrations for the Energy, Defense, Technology, Not for Profit, Pharmaceutical and Public Sector industries.

Edwin Yau is a Senior Manager in the Risk Advisory practice in Deloitte's Vancouver office. He has 11 years' experience at Deloitte managing and executing financial and information technology audits, and providing other assurance and risk advisory services for major public, private and government organizations. During his career with Deloitte, Edwin has been seconded on a four month term to South Australia primarily serving public sector clients in the region. Edwin is a graduate of the Sauder School of Business at the University of British Columbia, specializing in management information systems. He is a Chartered Accountant (CA), a Certified Internal Auditor (CIA) and a Certified Information Systems Auditor (CISA) and is a past president and a continuing member of the Vancouver chapter of ISACA, an association of IT governance professionals.

Jill Teasley is a Senior Consultant in the Information Management and Analytics Technology practice within the Consulting function at Deloitte. With more than ten years of experience

working in information management roles with both private and public sector organizations, Jill specializes in defining and deploying solutions that align clients' business values and compliance requirements to leading enterprise content management (ECM) practices. Jill is a graduate of the Master of Archival Studies program at the University of British Columbia. She is a current member of the Archives Association of British Columbia's Programs Committee and past chair of the Association of Canadian Archivists' Professional Learning Committee.

Michelle Spelay is a Dual MAS/MLIS candidate at the School of Library, Archival and Information Studies (SLAIS) at UBC. She currently works as a Graduate Research Assistant for InterPARES Trust and as a Records Assistant at the College of Registered Nurses of British Columbia. She holds an English Degree (Hons.) from the University of Victoria and is originally from Comox, BC.