



**2009 ARMA  
Southwest Region  
Training Conference  
August 6-8, 2009  
Agenda**

Grapevine Convention Center  
 Holiday Inn Express Hotel & Suites  
 309 State Highway 114 West  
 Grapevine, TX 76051  
 Office 817-442-5177 Fax 817-442-5960  
[www.hiexpress.com/grapevintx](http://www.hiexpress.com/grapevintx)

Meeting Room Locations			
Holiday Inn Express		Grapevine Convention Center	

**THURSDAY, August 6, 2009**

8:30 am - 5:00 pm	Registration		
10:00 am - 11:30 am	Region Management Team Meeting		
11:30 am - 12:15 pm	Lunch (Box Lunch Provided - included in registration)		
12:15 pm - 12:45 pm	Opening Remarks		
12:45 pm - 2:45 pm	President's Meeting	TBD	Officer's orientation (new and existing officer's Training)
2:45 pm - 3:00 pm	Break		
3:00 pm - 4:00 pm	ARMA HQ and Your Chapter: Resources for Success - Tom Killam		
4:00 pm - 5:00 pm	ARMA International Board - Working for You - Komal Gulich		
6:00 pm - 8:00 pm	Austin Ranch (Optional Event) - leave from Hotel		

**FRIDAY, August 7, 2009**

	Breakfast Provided by Hotel as part of Hotel Registration			
8:30 am - 9:45 pm	Marketing & Conducting Successful Seminars	TBD	Educational programs – ideas and planning your monthly meetings and workshops	TBD
9:45 am - 10:00 am	Break			TBD
10:00 am - 11:15 am	Membership: New, Retention, & Involvement	TBD	<b>Vendor Involvement</b>	TBD
11:15 am - 11:30 am	AIEF Session -/ Trustee (Donna Rose)			TBD
11:30 am - 12:30 pm	Lunch			
12:30 pm - 2:30 pm	Strategic Planning - Building Your Leadership Momentum - Dale Mask (part 1)			TBD
2:30 pm - 3:45 pm	Break			TBD
2:45 pm - 5:00 pm	Strategic Planning - Building Your Leadership Momentum - Dale Mask (part 2)			TBD
7:00 pm - 9:00 pm	Dinner on your own (optional shopping trip to Grapevine Mills Mall)			

**SATURDAY, August 8, 2009**

	Breakfast Provided by Hotel as part of Hotel Registration		
8:00 am - 10:15 am	Chapter Operations Planning exercise		TBD
10:15 am - 10:30 am	Break		TBD
10:30 am - 11:00 am	2010 Leadership Hosting Presentation		TBD
11:00 am - 12:00 pm	Wrap-Up Session & Adjournment		TBD

Updated: June 16, 2009

## Dale Mask -Building Your Leadership Momentum: Putting Strategic Planning to Work

### Workshop Objective:

- Help ARMA chapters apply strategic planning principles to work
- Develop specific strategic plans that benefit ARMA at the local level and as a whole
- Increase ARMA's value proposition at all levels

### Learning Objectives:

By the end of this 4-hour session, participants will be able to:

- Align local chapter mission, vision and values with ARMA International's
- Apply strategic thinking principles
- Establish an effective strategic planning committee
- Utilize the strategic planning process
- Evaluate internal and external factors
- Do a SWOT analysis
- Develop a strategic plan for their chapter
- Identify methods to measure plan effectiveness

### Program Outline:

- The value of strategic planning
- Creating a strategic planning committee
- Aligning mission, vision and values
- What is strategic thinking?
- Visioning exercise
- Situation analysis – looking at all the factors
- Developing priorities
- SWOT
- Developing the plan
- Fitting the plan to the budget
- Putting measurements in place
- Communicating the plan and plan initiation

**Note:** The entire session will be highly interactive. The learners will participate in the strategic planning process and develop a plan to improve a key aspect of ARMA's value proposition. The participants will be divided into groups with group members being from different chapters to facilitate sharing of knowledge and the creation of new ideas.

Although the specific issue for the planning process will be developed by each group, no two groups will be working on the same issue. The issues selected could be any one of these areas:

- Overcoming economic issues
- Attracting "younger" members
- Succession planning for board members
- Overcoming "board burnout"
- Teaming for greater impact (groups – chapters – vendor support)
- Networking
- Education
- Relevant / timely information
- Best practices
- Event speakers / topics
- Making meeting work for everyone
- Marketing to a more diverse job title and/or responsibility
- Improving working relationships between IT, legal and records managers
- Community outreach
- Developing your career path
- Self-promotion (e.g.: Letting your boss know how valuable ARMA is.)
- And others...

While the groups will decide what they will work on, all issues will be geared toward enhancing ARMA value to its members (customers). Each group will briefly present the key aspects of their plan with everyone. Although I am not certain of the logistics here, the plans developed at each session could then be shared with participants nation wide after all of the summer conferences have been completed.