

ARMA MADISON SPRING WORKSHOP



May 9, 2019

Madison, Wisconsin

Full Day Workshop

Digital Lifecycle Management Practical Tools & Rules

Government and commercial businesses use a multitude of ever-changing digital systems and content services that include collaboration sites, network file shares, email and instant messaging, web and social media, cloud hosted software and storage, dedicated business applications and asset management platforms, to name just a few. The volume and complexity of digital information produced and managed by these systems is rising exponentially, creating real life challenges for control, security, and operational efficiency.

There is a critical need for Information Governance and Records Management professionals to **promote defensible retention and disposition policies and practices that can be systematically and practically implemented.**

ARMA Madison is pleased to offer a full-day facilitated workshop on Thursday, May 9th, to share proven approaches from the private and public sectors on the essential components of robust, compliant and effective digital records and information management.



This interactive workshop was designed to engage and educate participants in the art and science of determining requirements and deploying rules and workflows in digital environments.



A select group of invited vendors will demonstrate tools and share implementation techniques essential to RIM architecture.



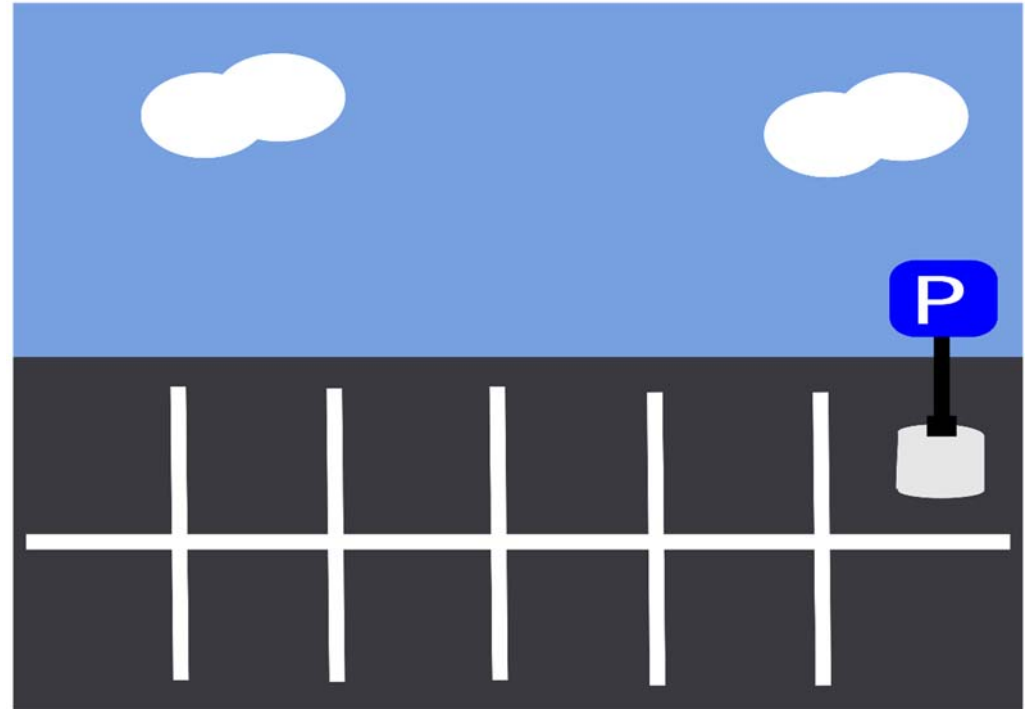
Workshop attendees will have ample opportunities to share stories, network with peers, and learn multiple ways to help their organizations improve their lifecycle management of digital information and systems.

Presented by ARMA Madison

Featured Topics

Through presentations, case studies, group exercises & facilitated discussions, technical demonstrations, and Q&A, this workshop will deliver:

- Proven methodologies to map information assets and records to the processes and systems used to manage them
- Tools and techniques for integrating business, legal, regulatory, operational, and archival requirements gathered from internal and external stakeholders
- Implementation and automation for defensible retention and destruction
- Digital strategies to maintain the authenticity, usability and findability of valued information assets through technology and business changes



Logistics

What You Need to Know

VENUE

The Practical Rules and Tools Workshop will be held in a spacious 2nd floor classroom at The Fluno Center on the UW-Madison campus.

Registration begins at 7:45 AM. Seminar runs from 8:15 AM to 4:00 PM.

AM/PM breaks and lunch included.

LODGING

For overnight accommodations please contact directly:

The Fluno Center
601 University Avenue
(608) 441-7117

DoubleTree by Hilton
Hotel Madison
525 W. Johnson Street
(608) 251-5511

Hampton Inn & Suites
Madison/Downtown
440 W. Johnson Street
(608) 255-0360

PARKING

Parking is available in a lot under The Fluno Center.

Please indicate if you require on-site parking when you register.

Enter the lot from Frances Street. Take the ticket from the machine and bring it to the ARMA Registration table to receive a parking pass.

You will need both the parking ticket and parking pass to exit the lot at the end of the day at no charge.

This Workshop is co-sponsored by:

iSchool @ UW-Madison

State of Wisconsin Public Records Board

Presented by ARMA Madison



SUBJECT MATTER EXPERTS

Patti Morris

Carol Brock, CRM

Patti Morris is a world-class subject matter expert on records and information management with 25 years of experience working for global pharmaceutical companies that include GlaxoSmithKline, Johnson & Johnson, AstraZeneca and Shire in increasingly more senior roles. For 8 years, she served as Chair or Vice-Chair of the Pharmaceutical Records & Information Management Organization, a consortium of senior leaders from 15 pharma companies.

As a strategic leader, her work has supported all areas of the business, with a specialty focus on records and information in all formats generated during the drug development lifecycle that are subject to FDA regulations and other health and industry authorities.

Her expertise in electronic archiving led to the successful implementation of global eArchive solutions at AstraZeneca and Shire that significantly reduced cost and risk and delivered the ROI promised to executive sponsors. The AZ project was a first-in-class solution for pharma based on the Open Archival Information System (ISO 14721) standard. These solutions were focused on delivering the processes, resources and technology to assure the long-term digital preservation of essential business evidence and scientific research.

In her current role as President and Chief Process Consultant at eArchive Science Patti delivers expert solutions for the efficient management and governance of records and information through their entire lifespan to clients in the US and EU.

Information technology is at the core of how you do your business and how your business model itself evolves.

Carol Brock is an expert practitioner, author, and teacher on records and digital business processes who popularized big-bucket functional retention schedules in the US Federal government. She has 30 years' experience as a contractor, consultant, and Federal employee at agencies including the Nuclear Regulatory Commission, EPA, Department of Justice, Department of Defense, and the Overseas Private Investment Corporation.

In June 2010, Carol provided invited expert testimony on behalf of ARMA International before a Senate Subcommittee and House Committee on the status of federal records management.

Carol served on the management team for the U.S. Department of the Interior enterprise-wide content management system. This FISMA-moderate cloud system supports 98,000 users in 50 states and features auto-categorization. She consolidated 200+ legacy schedules into a single schedule featuring 37 lines of business and less than 60 retention periods.

Carol was formerly the OpenText Global Public Sector Strategist, delivering information management strategies to federal, state/provincial, and local governments in Canada, Mexico, South Africa, New Zealand, Australia, Singapore and the US. She recently completed coursework toward a Ph.D. in Digital Preservation as a Research Fellow at the University of Texas at Austin and is currently conducting research.

Carol provides IG and RM consulting services to federal agencies as the principal of Brock Information Governance Services.

May 9, 2019

Tools & Rules Workshop

Digital Lifecycle
Management

Presented by ARMA Madison

REGISTRATION

Limited to 55 Attendees



WHO SHOULD ATTEND?

ARMA Madison welcomes professionals from across the spectrum of information management disciplines and domains including:

- ✓ Information Governance
- ✓ Records Management
- ✓ Archives Management
- ✓ System Administration
- ✓ Library & Collection Management
- ✓ Business Strategy & Analysis
- ✓ Legal Tech
- ✓ Project Management
- ✓ IT Architecture
- ✓ Audit & Compliance
- ✓ Security & Risk Management
- ✓ Systems Integration

To ensure the **best possible educational and networking experience** for all, registration is limited to 55.

We encourage practitioners to bring managers and/or colleagues to the workshop to multiply the positive impacts of sharing and learning together.

Workshop attendees are invited to bring real-life retention and disposition challenges and examples to contribute to the conversation.

Featuring case studies and demonstrations from:



RESERVE YOUR SEAT NOW!

May 9, 2019

Tools & Rules Workshop

Digital Lifecycle Management

Presented by ARMA Madison

To reserve your seat at the Practical Rules & Tools Workshop, please register by **Friday, April 26**.

Questions? Contact us at seminar-registration@armamadison.org

REGISTER & PAY ON-LINE

Visit armamadison.org/seminar/registration and pay by credit card.

REGISTER BY EMAIL

Send your complete registration information to Yvonne.Subak@wpsic.com and arrange for advance or on-site payment.

REGISTER BY MAIL & CHECK

Send your registration form with payment (payable to ARMA Madison) to: ARMA Madison, P.O. Box 8863, Madison, WI, 53708-8863

REGISTRATION FEES

ARMA Member	\$125.00
Non-ARMA Member	\$150.00
Three or more attendees from the same organization	\$115 per person
New Member Seminar Package	\$300.00
<i>Includes full day workshop plus one-year membership to both ARMA International and the Madison ARMA Chapter (\$25 savings)</i>	
Students with School ID	\$ 80.00

Cancellation & Refund Policy for this Event

If you need to cancel your registration, please contact us at least 48 hours in advance. Refunds for pre-paid registrations are subject to a \$20 processing fee. No refunds are given for no-shows.

-----REGISTRATION FORM-----



Your Name

Agency, Organization or Company Name

Your Title

Division / Department

()

Phone Number

Mailing Address

Email (confirmation and pre-workshop communications will be sent here)

Yes, I plan to park on-site at The Fluno Center

Yes, ARMA Madison has permission to share my contact information with other attendees.

ARMA Madison Chapter Federal Tax ID: 48-0993529

ICRM Certification Maintenance Credits (CMP) – pending approval

ARMA International is a not-for-profit professional association and the authority on governing information as a strategic asset. Formed in 1979, the ARMA Madison Chapter counts among its members more than 70 professionals from a variety of area organizations including state and local government, utility companies, finance and insurance businesses, law firms, manufacturers, not-for-profit and educational institutions, as well as information governance and records management consultants and business partners.

Our mission is to promote and advance the professional competence of our members to enable them to provide records and information management leadership and expertise within their organizations and communities.

See you May 9th!