



**UTILITY
RECORDS &
INFORMATION
MANAGEMENT**

**Wisconsin / Upper Midwest
2017 Regional Conference
June 12 & 13, 2017**

WPPI Energy

1425 Corporate Center Drive Sun Prairie, WI 53590

Welcome!

We are glad you could join us for the inaugural
URIM Wisconsin / Upper Midwest Conference.

*The 2017 URIM Regional Conference is ICRM accredited. (IGP accreditation pending).
Certificates of Attendance will be provided after completion of the conference to support your
accreditation requirement.*

Monday, June 12

8:15 - 9:00 AM	<i>Hot Breakfast</i>
9:00 - 9:40 AM	Welcome: Housekeeping, Overview, Rules of Conduct, Introductions
9:40 - 10:00 AM	<i>Break - refreshments</i>
10:00 - 11:45 AM	Keynote: Regulatory Compliance (Public Service Commission of WI)
11:45 AM - 1:00 PM	<i>Lunch & Networking</i>
1:00 - 2:20 PM	E-mail Retention Periods (PSCW) - Presentation & Discussion
2:20 - 2:40 PM	<i>Break - refreshments</i>
2:40 - 4:00 PM	Retention Schedule Development (PSCW + member SMEs) - Discussion
4:00 PM	Day One Session complete
5:00 - 8:00 PM	Evening Reception (<i>see below</i>)



Evening Reception

Erin's Snug Irish Pub
4601 American Parkway
Madison, WI 53718
5:00 - 8:00 PM
Kayleigh Seomra Room





Tuesday, June 13

8:15 - 9:00 AM	<i>Cold Breakfast</i>
9:00 - 10:20 AM	Moderated Roundtable: Unstructured Content Management
10:20 - 10:40 AM	<i>Break - refreshments</i>
10:40 AM - 12:00 PM	RIM in the Cloud (services/applications) - Case Study
12:00 - 1:00 PM	<i>Lunch & Networking</i>
1:00 - 2:20 PM	RIM Rules & Tools - Case Study
2:20 - 2:40 PM	<i>Break - refreshments</i>
2:40 - 4:00 PM	Moderated Roundtable: "Lines of Business" records management
4:00 PM	Thank You / Wrap-up



Find us on Yahoo Groups and LinkedIn:

<https://groups.yahoo.com/neo/groups/UtilityRIM/info>

NOTE: Yahoo requires registration with the moderator.
Contact les.bossert@mdu.com for details.

<https://www.linkedin.com/groups/12005585>

NOTE: LinkedIn requires an invitation from the host.
Contact tgoss@wppienergy.org for details.

Special Thanks to the Conference Core Team:

- Allison Coshenet / Madison Gas & Electric
- Herb Foster / American Transmission Co.
- Tammy Goss / WPPI Energy
- Jason Kelly-Van Domelen / Alliant Energy
- Mark LeMahieu / WEC Energy Group

The Advisory Team:

- Les Bossert / Montana-Dakota Utilities Co.
- Chris Prince / Duke Energy
- Paula Sutton / Records Matter LLC

The Public Service Commission of Wisconsin

and ARMA-Madison, for sponsoring the registration



M A D I S O N

Things to see and do in the greater Madison area:

Greater Madison Convention & Visitors Bureau:

<http://www.visitmadison.com/>

Area Golf Courses:

<http://www.wisconsin-golf.com/courses/madison/>

Wisconsin Dells official website:

<http://www.wisdells.com/wisconsin-dells.htm>

Brewery Tours, Pubs, and Grub:

<https://www.beeradvocate.com/place/city/37/>



Places to stay:

Hotel

Address

Phone

Closest to Conference:

Quality Inn & Suites	105 Business Park Dr. Sun Prairie	(608) 834-9889
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Closest to Reception (nearest to farthest):

<https://goo.gl/maps/qRs9rNvXitN2>

LaQuinta Inn & Suites	5217 E. Terrace Dr. Madison	(608) 245-0123
Holiday Inn	5109 W. Terrace Dr. Madison	(608) 249-4220
Cambria Hotel & Suites	5045 Eastpark Blvd. Madison	(608) 241-7070
Staybridge Suites East	3301 City View Dr. Madison	(608) 241-2300
Grandstay Suites	5317 High Crossing Blvd. Madison	(608) 241-2500
Holiday Inn Express	5150 High Crossing Blvd. Madison	(608) 467-3555
Fairfield Inn & Suites	2702 Crossroads Dr. Madison	(608) 661-2700
Courtyard by Marriott	2502 Crossroads Dr. Madison	(608) 661-8100
Best Western East Towne	4801 Annamark Dr. Madison	(608) 244-2020
Comfort Inn & Suites	4822 E. Washington Ave. Madison	(608) 244-6265
Residence Inn East	4862 Hayes Rd. Madison	(608) 244-5047
Hampton Inn East	4820 Hayes Rd. Madison	(608) 244-9400
Crowne Plaza	4402 E. Washington Ave. Madison	(608) 244-4703

Reception is 6 miles from Conference: <https://goo.gl/maps/8JD76wJnpHD2>



**URIM - Wisconsin / Upper Midwest
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BREAKFAST & LUNCH MENUS**

Day 1

Breakfast	Gaylord's Catering	Country Style Breakfast	• Scrambled Eggs • Breakfast Potatoes • Bacon • Sausage • Bakery items
AM Snacks	WPPI	Energy bars, fruit, nuts	
Lunch	Qdoba	Hot Taco/Burrito bar	• Grilled Chicken and Steak • Flour tortillas, corn hard-shell, tortilla chips • Rice • Beans • Salsas • Various toppings
PM Snacks	WPPI/ Tammy	CYO Sundaes (Sassy Cow - local) Veggies & dip Assorted bars	• Vanilla or Chocolate • Syrup – chocolate and caramel • Sprinkles • Fruit • Nuts • Whipped cream
Reception	Erin's Snug Irish Pub		A selection of appetizer platters including fresh fruits, vegetables, meats, cheeses, crackers, and hot Irish favorites, plus cheesecakes for dessert!

Day 2

Breakfast	Gaylord's Catering	CYO Yogurt Parfait	• Yogurt – Strawberry and Vanilla • Strawberries and Blueberries • Almonds • Granola
AM Snacks	WPPI	Energy bars, fruit, nuts	
Lunch	Gristle	Chicken and Pig	• Rotisserie Chicken • Pulled Pork • Mac & Cheese (gluten-free) • Cornbread • Farmer's Market Salad
PM Snacks	WPPI/Tammy	Energy bars, fruit, nuts, homemade treats	• Wild Rice Cookies • Maple Whiskey Glazed Nuts • White Chocolate Cranberry Popcorn Crunch • Local cheese and sausage • Veggies and Dip

Beverages (WPPI) - Coffee, tea, bottled water, pop, and milk