

**Monday May 31, 2010**

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**Keynote Presentation**

**8:45 AM – 9:45 AM**

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**Professional Ethics: A Preventative Maintenance Approach**

Meeting Room: Convention Centre Ballroom

Dr. Christopher Bauer, PhD, HSP, CFS Bauer Ethics Seminars

This won't be a review of the ethics code, case studies, or case law! Instead, this presentation is designed to ensure that you and your entire organization are able to more easily "walk the talk" of great ethics. This often-humorous program will show ethics risks we never even knew we had and what can be done right now to make sure those risks don't turn into costly ethical and legal problems on the job.

Ethics and fun aren't words normally heard in the same sentence. However, Dr. Bauer has been making professional ethics both straightforward and fun for international audiences for more than 25 years. He will present ethics differently than you have probably ever experienced them before. The tone will be conversational and the ideas immediately applicable. You will leave with easy, practical ideas and tools to reduce your risk for ethics difficulties while simultaneously reducing those risks for your colleagues, co-workers and entire organization.

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**Education Sessions**

**1:15 PM – 2:30 PM**

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**M11 Developing an Effective RIM Strategy**

*Business Functions*

Meeting Room: Salon D

Katherine Chornoboy, CRM President, InfoAccess Consulting Group Ltd.

Do you know where your RIM program is going? This session will discuss the importance of having a RIM strategy that is aligned with your organizational culture and objectives. It will also explore different approaches to strategic planning and identify the steps required to develop an effective RIM strategy.

**M12 So You Think You're Ready to Implement ECM?**

*IT*

Meeting Room: Salon B

Janet de Guzman Program Manager, Ontario Public Sector, OpenText

Organizations cite many business drivers for planning their Enterprise Content Management (ECM) implementation such as protecting information assets, achieving compliance, improving processes, increasing accountability and reducing risk. However, implementing a technology solution is not a silver bullet. The software industry is littered with failed projects where organizations did not pause to ask themselves, "What should we do before we embark on this project to ensure success?" This session will review key readiness activities ranging from the strategic to the tactical that should take place prior to an ECM implementation including engaging the organization, establishing program governance, involving the user base and optimizing solution design.

**M13 Essential Business Ethics for RIM Professionals***Leadership*

Meeting Room: Salon A

Christopher Bauer, PhD, HSP, CFS Bauer Ethics Seminars

A large percentage of the ethical issues records and information management (RIM) professionals face are actually outside the RIM arena, making them easy to either miss or ignore. Will you recognize them and know how to respond appropriately? Building on the foundation concepts introduced in the keynote, this session will use facilitated discussion in both small and large groups to allow you to dig into the meat of a wide variety of ethical issues, some easily recognized as ethics concerns and many not. Attend this highly-interactive and often humorous session to review and expand your knowledge of the essentials of business ethics.

**M14 Translating RIM Classification and Retention for ERMS Implementation***Business Functions*

Meeting Room: Salon C

Bruce Schinkelwitz, CRM Principal, Foundational Inc.

This session will educate attendees about the core operational concepts of Electronic Records Management Systems (ERMS), and the issues and best practices in translating functional classification schemes and retention schedules to meet the requirements for effectively using an ERMS. Case study examples will be used to impart an understanding of the nature of taxonomy and metadata as critical foundational pre-requisites for effectively managing electronic records.

**M15 Risk Management Basics for RIM Professionals (workshop)***Risk Management*

Meeting Room: Salon E

Victoria Lemieux, PhD Assistant Professor, School of Library, Archival &amp; Information Studies, University of British Columbia

This workshop will introduce records and information management (RIM) professionals to the basics of risk management. Topics to be covered include: the identification of RIM risks, assessment and measurement of RIM risks, mitigation of RIM risks, and tracking and monitoring RIM risks. The speaker will draw on updated material from her 2004 ARMA publication, "Managing Risks for Records and Information Programs". Working in small groups, participants will have an opportunity to practice using risk management tools and techniques. Interaction and discussion will be encouraged throughout the workshop.

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**Education Sessions****3:00 PM – 4:15 PM**

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**M21 Developing Your Career Path Using RIM Core Competency Standards***Business Functions*

Meeting Room: Salon A

Christine Ardern, CRM, FAI Principal Consultant, The Information Management Specialists

The field of records and information management (RIM) is changing as are the expectations of those who are both entering and working in it. This session will review two competency models – ARMA International's Records and Information Management Core Competencies and the Competencies of the Federal Government Information Management Community (CGSB 192.2-

2009) – which are the basis of job descriptions, career advancement and educational programs. It will look at the two models, review the high level content of each and outline how they can be effectively used by human resources professionals, RIM professionals and educational institutions to move the profession into the next decade.

## **M22 How to Procure the ECM Solution That is Right for You**

*IT*

Meeting Room: Salon B

Marilyn Carr Director, Advisory Services, PricewaterhouseCoopers LLP  
Chris Walker Independent Information Management Consultant

Considerable time and effort is spent evaluating, selecting and procuring Enterprise Content Management (ECM) solutions, but typically only a small portion of that effort directly contributes to a successful outcome. That's because the process tends to focus on a long laundry list of features and functions instead of what's most important for meeting an organization's needs. Join the speakers as they address the factors that matter most (and those that matter least) when choosing an ECM solution, the type of content to look for in a RFP response, and the procurement options you should consider.

## **M23 Information Management Snapshot**

*Communications & Marketing*

Meeting Room: Salon D

Denise Bruno Records and Information Audit/Compliance Officer, Regional Municipality of York  
Penny Clayson Manager, Corporate Records and Information Management, Regional Municipality of York

The Information Management Snapshot (IM Snapshot) is a home-grown tool that provides a snapshot in time of statistics on e-mail, network files, paper records and records in the Electronic Document and Records Management System (EDRMS). It highlights where departments are doing well in managing their information and where they need assistance. Developed at York Region, the IM Snapshot has been used successfully to market services, increase awareness at the senior management level, improve the relationship with IT, and justify new Records and Information Management (RIM) positions. Come learn how you can use the IM Snapshot to raise the profile of your RIM Program.

## **M24 Records Management as a Governance Function (case study)**

*RIM Practices*

Meeting Room: Salon C

Kathy Fur, CRM Corporate Records Manager, BMO Financial Group

How does a Corporate Records Management department with two full-time positions operate in a multi-national organization with 35,000+ employees? Attend this session to learn how BMO Financial Group has structured its enterprise-wide records management program. This session will address developing and maintaining the policy framework, records retention schedule and training materials; managing change and engaging stakeholders; creating an implementation methodology leveraging a records inventory tool; and applying a risk-based approach to both legacy and electronic records.

## **M25 Risk Management Basics for RIM Professionals (workshop)**

(continued from previous session, see session M15)