

Tuesday June 1, 2010

Education Sessions

8:30 AM – 9:45 AM

T11 Effective Decision Making

Business Functions

Meeting Room: Salon D

Rick Weinholdt Consultant, GANDRA Consulting

Helping groups make high-quality decisions is the most important function of a manager or supervisor. Unfortunately, decision making is also one of the most difficult things to do properly. Picture yourself leading the third meeting in a row where the same hot topic issue gets thrashed around without a final decision. Once again three people do all the talking while all the others squirm or excuse themselves and leave. But a decision has to finally be made. How are you going to do it? Join the speaker in this exploration of how to become more effective at making decisions.

T12 Identifying and Classifying E-mail Messages as Records (workshop)

IT

Meeting Room: Salon E

Jesse Wilkins, CRM Principal Consultant, Access Sciences Corporation

This session will introduce classification concepts and guide you in applying them to identify and manage e-mail messages as records. Attend this session to learn how to classify messages using manual and automated approaches, and examine new concepts in classification including tagging. You'll also have an opportunity to practice classifying messages as records into a classification scheme you'll develop.

T13 Generally Accepted Recordkeeping Principles (GARP®)

Leadership

Meeting Room: Salon B

Rick Stirling President, Western Information Management

Similar to the generally accepted accounting principles for the accounting industry, the Generally Accepted Recordkeeping Principles (GARP®) developed by ARMA International form the basis upon which every effective RIM program will be built, the yardstick by which organizations will be measured, and the standard by which organizations will be held accountable in the future. Come join one of the Canadian authors of GARP® to learn how GARP® can be used to foster general awareness of recordkeeping standards and principles, and assist organizations in developing records systems that comply with them.

T14 Successfully Implementing RIM: A Multi-Year Plan (case study)

RIM Practices

Meeting Room: Salon A

Jackie Winkler Manager, Records and Document Services, OMERS Administration Corporation
Barbara Wiggins Advisor, B.G. Consulting Services

A key challenge for individuals responsible for a Records and Information Management (RIM) Program is how to lead and apply an approach for both implementation and ongoing

management that will enable their organizations to meet RIM requirements while also being positively received and actively embraced by all business areas. This session will present real world examples - different approaches to implementation, specific strategies for working collaboratively with business areas, and how to make your classification scheme, retention schedule and RIM-specific business processes more user friendly.

T15 Digital Records Forensics: Conducting a Gap Analysis to Measure Legal Risk

Risk Management

Meeting Room: Salon C

Alexandra Allen Master of Archival Studies Student, School of Library, Archival & Information Studies, University of British Columbia

Corinne Rogers PhD Student, School of Library, Archival & Information Studies, University of British Columbia

Records and information management professionals must determine and maintain authenticity over time of the digital records in their care. This requirement is of particular concern in law enforcement which increasingly relies on the new discipline of “digital records forensics” to identify, extract, maintain and preserve records required for court. This session will introduce and discuss preliminary findings of a new research project that combines archival diplomatics, digital recordkeeping best practices, the Law of Evidence and digital forensics into a body of knowledge called “Digital Records Forensics”. Research case studies that identified risk through gap analyses in digital recordkeeping environments will be presented.

Technology Spotlight

10:30 AM – 12 Noon

Sponsored by IBM

Content Assessment and Analytics: Gaining Control of What Matters

Meeting Room: Convention Centre Ballroom

Paul Fisher, CDIA+, CRM Managing Consultant, Enterprise Content Management, Business Analytics & Optimization, IBM Global Business Services

Paul Taylor IBM Distinguished Engineer, Chief Software Architect: Enterprise Content Management, IBM Academy of Technology, IBM Software Group – Industry Solutions Development

Every organization struggles with growing volumes, variety and velocity of information. Much of this information being stored is unnecessary – over-retained, irrelevant, or duplicate. But much of this information also contains critical concepts and themes, and can identify critical business patterns over time.

This session will provide an overview of next generation technologies called Content Assessment and Content Analytics that enable organizations to dynamically analyze what they have, decommission what's unnecessary, and preserve and exploit the content that matters.

Poster Sessions 12 Noon – 4:00 PM

PS1 Integrated Information Management – Aligning Data Security, Protection and Retention

Risk Management

Meeting Room: Salon Foyer (hallway outside of Salons B – E on the main floor)

Marcia Douglas Associate Partner, Deloitte

Records retention, information management security and data protection are closely aligned, yet it is challenging to find a way to effectively manage them simultaneously. Although different parts of an organization are usually tasked with retention, data protection and security, all groups are mutually concerned with adequately protecting and managing the organization's information assets. This session will demonstrate how one organization chose to concretely link information security, protection and retention to minimize user impacts and maximize operational value. The session will also provide a sample framework and articulate the business value for defining an integrated approach in order to reduce risk.

PS2 Adventures in Publishing the History of Records Management in Canada

Leadership

Meeting Room: Salon Foyer (hallway outside of Salons B – E on the main floor)

Margaret Russell, CRM Information Specialist, Imperial Oil

This session captures the sequence of events leading to the goal of publishing the first comprehensive study of the history of records management in Canada. The history will focus on Canadian contributors and their accomplishments. Join one of the project team members to view the progress made to date, illustrated with timelines and progress charts and highlights of the research completed and in progress. Come learn about the challenges of completing this uniquely Canadian document which – when complete – will be available to students, educators and historians.

PS3 Toward an Electronic Health Record in a Community Health Facility

RIM Practices

Meeting Room: Salon Foyer (hallway outside of Salons B – E on the main floor)

Valdene Wager, CRM Clinical Information Services Manager, Pathways to Health Centre for Children

This session outlines the stages and steps in moving to an Electronic Health Record in a community out-patient children's rehabilitation health facility. You will see the cost-benefit analysis that was presented to executive management, and how the clinical end-users were involved in the project. The session will also show the process used for purchasing the software and the project planning, from scope document to project team selection, through work steps to key milestones. You will also see the key metrics used to measure the project's success.

PS4 Incorporating Information Management Requirements into Business Processes

Business Functions

Cancelled

Meeting Room: Salon Foyer (hallway outside of Salons B – E on the main floor)

Chris Walker Independent Information Management Consultant

If business processes rely on information and information must be managed through its life, why do we model them separately? Integrating business process and information management into the same model makes sense because process and information are inextricably linked to each other. This session will provide you with an overview of how to incorporate information management into business process models to provide your organization with a holistic view of your information-driven business processes. Come learn how developing a holistic view will allow you to identify issues, risks, and opportunities in information-driven processes.

PS5 Getting Key People in Your Organization to Listen by Seeing

Communications & Marketing

Meeting Room: Salon Foyer (hallway outside of Salons B – E on the main floor)

Patricia Burns, CRM Records Manager, New Brunswick Department of Finance

No one likes to have a failing grade on their report card. After many unsuccessful attempts to implement a Records and Information Management (RIM) Program, the Records Manager again evaluated RIM issues and presented senior management with the results in the form of a report card. With the "go-ahead" of senior management, a project plan identifying practical goals and a timeline were developed. Though the research was done, and the reports were written, the greatest impact was how the issues were communicated to the organization. Join the presenter in examining the important role visuals play in relaying messages to key stakeholders, the importance of setting reasonable and practical goals, and the importance of project management in a RIM project.

Education Sessions

1:15 PM – 2:30 PM

T21 The Cost of Poor Quality Recordkeeping Systems (workshop)

Business Functions

Meeting Room: Salon E

Conni Christensen Founding Partner, Synercon Management Consulting

The ability to adequately manage information and documents is a crucial element in any business but many organizations suffer from poor quality records and recordkeeping systems. Through role plays and exercises, this workshop will identify how business users interact with recordkeeping systems, examine examples of poor quality records, and analyze the impact of poor quality on business and organizational performance. Participants will develop a quality checklist for auditing and monitoring their systems, and discuss ways in which their organizations can improve their recordkeeping systems through better design of instruments and technology systems.

T22 Breathing Life Back into Your ECM Deployment

IT

Meeting Room: Salon B

Brenda Prowse, CRM Manager, Professional Services & IM, Prima Information Solutions

Many organizations implement an Enterprise Content Management (ECM) system to solve a business problem or implement records and information management (RIM) principles. Often the initial intention is to eventually expand the system into other areas of the organization; however, these intentions often tend to go by the wayside. This session will discuss ways of breathing life back into your ECM and finding ways to use the tool to its fullest potential.

T23 Gaining Respect: Effective Leadership with Integrity

Leadership

Meeting Room: Salon C

Glenn Yonemitsu Chief Executive Officer, Canadian Association of Management Consultants

Records and information management (RIM) has been gaining increasing respect over the past number of years, with advances in technology, increased transparency and a focus on privacy legislation. But, for many RIM managers, it is still difficult to gain the attention of senior management, secure the resources required to execute, or simply gain respect so that RIM issues are “on the table” when strategic issues are being discussed. This session will explore strategies for enabling RIM managers to lead with integrity, thus increasing the profile of RIM up, down and across the organization, and securing necessary resources.

T24 Enterprise Architecture, Cases, Integrated Semantics and Business Centric IM (case study)

RIM Practices

Meeting Room: Salon D

Marcel Lachance Managing Partner, MindShare/RainMakers

Yves Marleau President, Cogniva IM Solutions

Sharon Smith Senior Project Officer, Library and Archives Canada

This session presents case studies of Government of Canada organizations that have implemented recordkeeping centric enterprise architecture models, case file models and integrated semantics- based classification systems to meet the requirements of the Treasury Board’s Directive on Recordkeeping. The session will focus on how records of business value are managed and integrated with business transactions as strategic assets to support effective decision making and facilitate both operations and program delivery.

T25 Using Records as Documentary Evidence

Risk Management

Meeting Room: Salon A

Lewis Eisen Manager, IM Program, Fisheries and Oceans Canada

The records you keep in the course of business may some day be used as evidence in court. But what exactly do these records prove? Only in very specific circumstances can they can be used to prove the actual truth of their contents. Once you understand the rules around using business records as documentary evidence, you can make better decisions about what information has value and what is not worth keeping. This session will discuss the requirements to admit business records in court as evidence, and how they are put forward, and what they can be used to prove.

Education Sessions 3:00 PM – 4:15 PM

T31 The Cost of Poor Quality Recordkeeping Systems (workshop)
(continued from previous session, see session T21)

T32 The Million Dollar ROI of a Large Imaging Project (case study)

IT

Meeting Room: Salon A

Lea Beeken, Supervisor, District Records and FOIP Management, Edmonton Public School Board

Don Crothers, ECOMP Senior Account Manager, Critical Control Solutions

Many organizations have defined, definitive imaging and retrieval needs to meet their business requirements, although not every organization has looked at the positive financial impact a successful imaging project can deliver. This case study will review how Edmonton Public Schools implemented a scanning solution of their human resources files to streamline operations and efficiencies and deliver a significant return to stakeholders.

T33 The “Why” and “How” of the ARMA Maturity Model (case study)

Leadership

Meeting Room: Salon B

Sam McCollum, CRM Manager, Information and Records Management, ENMAX Corporation

Based on the GARP® principles plus a foundation of standards, best practices, and legal/regulatory requirements, the ARMA International Maturity Model for Information Governance begins to paint a more complete picture of what effective information governance looks like. This session introduces the Maturity Model and how it can be used to conduct a preliminary evaluation of any organization’s recordkeeping programs and practices. This session will also illustrate how one organization has used the model, created “position papers” as a first step in obtaining management approval for Maturity Model action plans, and developed action plans to successfully upgrade GARP® areas that needed improvement.

T34 Preparing for the CRM Exam, Parts 1 – 5

RIM Practices

Meeting Room: Salon D

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

William Le Fevre, CA, CRM Reference Archivist, Wayne State University

Designed for individuals who are interested in taking Parts 1 – 5 of the Certified Records Manager (CRM) examinations, this session will provide a high-level overview of the history and benefits of professional certification in the RIM industry, discuss the role of the Institute of Certified Records Managers (ICRM) and explain the exam application process. The session will also identify tools for self-assessing exam readiness and, focusing on Parts 1 – 5, provide tips on evaluating exam preparation needs. Through a series of sample questions and answers, you’ll increase your understanding of how exam questions are structured and learn test taking strategies.

T35 Bad Banks, Bad Records: RIM Failures and the Global Financial Crisis (case study)

Risk Management

Meeting Room: Salon C

Elaine Goh PhD Student, School of Library, Archival & Information Studies, University of British Columbia

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

Join the speakers as they take you on a fascinating journey exploring the role played by records and information management (RIM) practices at Lehman Brothers and its counterparties in the collapse of the global financial system in 2008. This case study of the collapse of Lehman Brothers draws on the work of the CiFER research team at the University of British Columbia in analysing data from former Lehman Brothers employees, the bank's administrators, financial regulators, industry analysts and academics.