Establishing & Managing Successful Records Management Programs

A power-packed two-day workshop designed to provide the “how to’s” for managing electronic records and conquering the paper pile-up problem.

Thursday & Friday
June 3 - 4, 2010
Sacramento, CA
Does your company have...

- A continual “explosion” of electronic and paper records
- Decentralized control with no real RM program in place
- Difficulty determining which records should be digital, in paper filing systems, scanned, or on microfilm
- COMPLIANCE concerns and legal exposure because of records destroyed too quickly or retained too long
- Unprotected vital records and concerns about security
- Nonexistent or inconsistent records retention policies
- Messy and inefficient filing systems for paper records
- Growing volumes of inactive records not managed well
- Concerns about legal discovery requests and issues
- Questions about the potential of imaging systems
- Uncertainty about managing e-mail and all digital records
- Concern about which software platforms should be used to manage electronic, paper, and all records

You will learn...

- How to develop appropriate organization-wide records management programs
- How long to retain records and develop legally valid records retention programs
- State-of-the-art approaches for managing e-mail, all digital/electronic records, paper records and all records
- How to plan, design, and implement quality paper filing systems
- How to understand digital imaging applications and potential uses for microfilm imaging
- How to clean out and manage inactive records
- How to identify and protect vital electronic and paper records
- Alternative software platforms available to accomplish ECM, ERM, EDM, & PRM functions in your organization

Who should participate?

- General managers, records managers, IT managers, office managers, accounting/finance managers, legal counselors, compliance/risk managers and business owners
- Individuals responsible for records management in law firms, banking, insurance, law enforcement agencies, hospitals, clinics, school districts, and other organizations
- Federal, state, county, and city government professionals responsible for records management
- Vendors of imaging systems, records centers, filing systems and software
- Business consultants who wish to expand their services to include records management program development
- Anyone who wants to learn how quality records management programs can be established and maintained

Seminar Topics

Introduction to Successful Records Management (RM) Programs

- Overview and critical importance of quality records management
- Why senior management must now make quality RM a high priority
- COMPLIANCE (Sarbanes-Oxley, HIPAA, FRC) implications for RM
- ISO 15489—the international records management standard
- Rationale for organization-wide centrally-managed RM programs
- Benefits and ROI of successful records management programs
- Recommended scope and components of org-wide RM programs

Proven Strategies for RM Program Development and Management

- The critical variable = securing senior management support for RM
- Unifying RM stakeholders—IT, Legal, Compliance, Risk Mgmt, others
- Building understanding that “the future of RM is primarily electronic”
- Remember that “getting control of paper records remains major RM need”
- Documenting current RM situations and benchmarking to ISO 15489
- Tried-and-proven strategies for developing/strengthening RM programs
- How to develop “strategic plans for records management”

Managing Electronic Records

- Electronic records are rarely managed well—so let’s change that!
- What are “electronic records” and what is “content management”?
- An “IT-Records Management partnership” —the critical necessity
- Solution—selecting and implementing ERM/ECM/EDM/RM software
- Solutions for effectively managing e-mail
- Successful strategies for managing electronic records
- RM 2010 in a “Web 2.0 World” (impact of “cloud computing”)
- Resources about managing electronic records

Developing and Implementing Legally-Valid Records Retention Programs

- The law and records management
- Litigation and operating consequences of deleting or throwing away records too quickly or keeping them too long
- Recommended strategies for retention program development
- Working with IT to manage retention of electronic records
- Software alternatives for enabling retention management
- Resources relative to managing records retention

Developing State-of-the-Art Filing Systems for Paper Records

- A look at the worst and best of today’s filing systems
- Strategies for improving existing filing systems and creating new ones
- Developing appropriate classification and indexing systems
- Recommended equipment, supplies, and software for great filing systems
- Utilizing RM software, shelf filing, bar coding, color coding, and RFID

Managing Inactive and Vital Records

- Finding, classifying, retention scheduling, and managing inactive records
- Strategies for identifying and protecting vital electronic and paper records
- The potential of “outsourcing” and roles of records centers
- Meeting archival needs and the importance of archives-RM cooperation
- Alternatives for systematic and cost-effective records disposition

Imaging and Applications of Imaging in Records Management

- Imaging alternatives include digital imaging and film-based imaging
- Film-based (microfilm) applications, technologies, and integration today
- Strategies for digital imaging (EDM) applications, software, and systems
- Capitalizing on web-based and intranet EDM integration and applications
- Issues and questions about implementing digital and film-based imaging
**Program Information**

**Dates & Times**

**Thursday, June 3, 2010**
8:00am–8:30am ~ Registration
8:30am–4:30pm ~ Seminar

**Friday, June 4, 2010**
8:30am–4:30pm ~ Seminar

**University of the Pacific**
McGeorge School of Law
3200 Fifth Avenue
Sacramento, CA 95817

**Fees**
$379 per participant or $359 each for two or more participants registering together from the same company.
- Price includes all class materials.
- 1.4 Continuing Education Units (CEUs) awarded upon completion (a total of 14 seminar hours).
- Participants are responsible for their own lunches and parking.

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**Cancellation Policy**
The seminar fee includes a nonrefundable $50 registration fee. The remainder of the fee may be refunded provided the Center for Professional & Continuing Education receives written notification of the withdrawal no later than 5 business days prior to the start date of the seminar. (Notification must be sent via email or fax.)

**Questions?**
Call the Center for Professional and Continuing Education: 209.946.2424 or 800.959.5376.

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**Records Management Programs**

**Registration**

Complete this form and register by phone, fax or mail.
*Please copy this form if registering more than two participants.*

**By Phone:** 209.946.2424 or 800.959.5376
**Fax:** 209.946.3916

**By Mail:**
University of the Pacific
Center for Professional & Continuing Education
3601 Pacific Avenue, Stockton, CA 95211

**Thursday & Friday, June 3 & 4, 2010, Sacramento, CA**

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Dr. Mark Langemo, CRM, is a professor emeritus in the College of Business and Public Administration at the University of North Dakota. Dr. Langemo has conducted records management seminars in Canada and Europe as well as over 600 seminars in more than 45 U.S. states. His consulting and seminar involvement includes work for the U.S. and Canadian federal governments, state and provincial governments, major corporations, health-care organizations, banks, law firms, accounting firms, energy and power companies, small businesses and professional associations. Dr. Langemo has co-authored four records management books, is a prolific journal article author, was the University of North Dakota’s Teacher of the Year, and has earned the highly coveted Award of Merit from the Association of Records Managers and Administrators (ARMA) International for “distinguished contributions to the field of records management.” He has also been inducted into ARMA’s “Company of Fellows” (ARMA’s highest honor). In October of 1993, Dr. Langemo received the EMMETT LEAHY AWARD from the Institute of Certified Records Managers. The Leahy Award is the highest award internationally in the field of records management. Dr. Langemo is a dynamic speaker who presents content-filled, media-illustrated and entertaining seminars.

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This intensive two-day professional development seminar will give you practical hands-on solutions to solve your records management dilemma.

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