



2023 SPRING CONFERENCE

Brought to you by the Twin Cities ARMA Chapter
Location: American Swedish Institute – Minneapolis

APRIL 11, 2023

8:30-2:30

AGENDA

Registration/Breakfast

8:30-9:00

EDUCATION SESSION 1

9:00-10:00

Applying Retention Controls in M365: You've Got to Start Somewhere

The definition of “you’ve got to start somewhere” is everyone must start somewhere and even a small or modest beginning can be sufficient or can be enough.

Retention policies, labels, implicit vs explicit, delete only, retain only, static scopes, adaptive scopes...it's a lot. Particularly when it's not your day job. When UnitedHealth Group implemented M365 it was all about productivity, collaboration, information sharing, efficient meetings and all the great features. Retention wasn't on the radar until the Enterprise Records & Information Management program made some noise. You get what you ask for? Maybe. Our strategy isn't fully deployed, but it's been an interesting journey.



Patricia Zimmerman is Senior Director, Enterprise Records & Information Management for UnitedHealth Group has over 35 years in the field of records and information management as an advisor, practitioner, and subject matter expert. She leads a team of talented information managers who provide oversight and operational efficiency for UnitedHealth Group, UnitedHealthcare and Optum. Prior to working at UnitedHealth Group, Patricia worked as a records management consultant, primarily in the healthcare industry.

Break

10:00-10:15

Training – Designing & Implementing an Effective & Engaging Program

Learn best practices for designing, implementing, and maintaining an effective, engaging, and fun training communication strategy. Then explore a case study of how General Mills, Inc developed and implemented a global mandated RIM Awareness training. This portion will cover the need for training, vendor considerations and General Mills approach to creating training, identifying key stakeholders, partnering with subject matter experts, translations, costs, and outcomes.



Abbie Ziegler, MSL, CFE is a Senior Compliance Manager with Ladder, an insurtech startup in Palo Alto, CA. Day-to-day, she's responsible for agent due diligence and oversight, fraud investigations, complaints, claims, training and communications, and any other compliance-related matters that may pop up. Prior to Ladder, she spent seven years focused solely on developing and executing Ethics & Compliance training and communication strategies. Abbie earned her Master of Studies in Law in Organizational Ethics and Compliance from the University of St. Thomas and holds her paralegal certification from the Minneapolis Paralegal Institute. Abbie is also a Certified Fraud Examiner.



Niki Engler is a Regulatory and Compliance Specialist at General Mills, Inc., responsible for driving RIM compliance, providing awareness and guidance on Information Governance strategies that align with RIM principles needed to support the lifecycle management of RIM assets. Her past 11 years of work history consists of varying roles centered around training (coordinating, development, implementation, programs, onboarding, etc.), awareness and records and information management as a Training Coordinator, Training and Quality Manager and her current role.

Lunch

11:30-12:30

RAPID FIRE NETWORKING

12:30-1:00

This will be a structured networking opportunity led by members of the TC ARMA Board of Directors.

Here is your opportunity to get your most pressing questions answered.

Talk with subject matter experts on topics that are of interest to YOU and share experiences.

The Language of Information

A common language is essential to more than communication and understanding; it is essential to success. This session will discuss terms, concepts, principles, and methods that aid in aligning business users, legal, and IT with your effort and objectives. Concepts and terms such as System of Record and Data Topics will be discussed and aligned to record management efforts. The transition from paper to digital and what it has changed and what it should not change will also be discussed.



Rick Sorenson, Data Management Consulting by Rick Sorenson (dmcbyrs.com), has held many hands-on and leadership roles related to data for over 30 years. The areas of data responsibility include data governance, data privacy, data compliance, discovery, security, integration, warehousing, database management, infrastructure storage, and of course an end-user of data. Based on his observations over the years and a desire to help others get a grip on their data, he has written a book titled, "A Logical Approach To Data Management (3 Questions)".

CONFERENCE DETAILS

Conference Location:

American Swedish Institute

[2600 Park Avenue](#)
[Minneapolis, MN 55407](#)

Directions

CLICK [THIS LINK](#) FOR DIRECTIONS FROM YOUR ORIGINATING LOCATION

Parking

Free parking is available in the American Swedish Institute's surface parking lot located at 27th Street and Park Avenue. Accessible parking spaces are located on the east side of the lot.

Registration Fees

Member	\$150
Non-Member	\$175
Student	\$75
Company Rate	\$125 ea (3 or more attendees)

Register Online

Visit: www.TwinCitiesARMA.org.

Credit card or check payment options are available.

[REGISTER HERE](#)

Cancellation Policy

Cancellations must be received no later than noon March 31st. If you cancel prior to that time, you will be issued a full refund. No shows and cancellations received after the noon deadline will be required to pay the full registration amount. The Chapter incurs a cost for the venue and food based on the number of reservations. Twin Cities Chapter members may transfer their meeting registration to another individual at any time

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