Creating a Retention Schedule: Understanding Your Options

Gone are the days when organizations, large or small, can keep information forever. Current or coming privacy regulations require a complete understanding of information and content, what it is, how it’s used, and how long it is to be retained. How long it is retained is defined in the organization’s Retention Schedule. To develop it, the organization needs to understand its regulatory requirements, contractual obligations, and business need. Once complete, it becomes company policy. Creating a Retention Schedule can be challenging. During this presentation, the speakers, who have a combined 65 years’ experience in developing, researching, and implementing retention schedules, will discuss the various options for creating and managing a retention schedule for your organization.

Speakers:

For over thirty years, Rosanne Stoltz, MSL, MBA, CRM, CIP, has been an active contributor to the field of Records and Information Management, focused heavily on retention schedules and compliance. She has been a Records Manager at Cargill for the past 15 years. In 2021, she earned a Master of Studies in Law focused on Organizational Ethics and Compliance. She also earned Graduate Certificates in Global Business and Strategic Risk & Responsibility. She also earned a Master of Business Administration from the University of St. Thomas in 1998. She is a Certified Records Manager and a Certified Information Professional.

Bill Roach, MSL, CRM, is a Privacy & Information Management Senior Analyst for Xcel Energy. He is responsible for the company’s Records Retention Schedule and is working to modernize Xcel’s approach to IG and RIM. He has 45 years of experience in Records Management & Retention, eDiscovery, Litigation Support, and ECMS related technologies. Over his career, he has managed records programs in the construction, defense, financial services, government, mining, petrochemical, and utility industries. Bill has a MSL in Organizational Ethics & Compliance from St Thomas and is a Certified Records Manager.

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