

2026 NAGARA ANNUAL CONFERENCE PRELIMINARY CONFERENCE PROGRAM



JULY 21 - 24, 2026

Early Bird Registration (through May 15):
Members: \$499.00 | Non-Member: \$699.00

Regular Registration (after May 15):
Members: \$599.00 | Non-Members: \$799.00

REGISTER NOW!

About This Preliminary Program

This preliminary program is provided to give attendees an early look at the planned sessions and speakers for the ***2026 NAGARA Annual Conference***.

While we strive to present a program that reflects the most current and relevant topics in our field, various external factors – such as budget constraints, staffing changes, and broader civic and/or economic shifts – may impact session availability.

As a result, some sessions listed in this preliminary program are subject to change or cancellation before the conference takes place. We appreciate your understanding and flexibility as we work to deliver a meaningful and engaging conference experience.

We look forward to seeing you all in Philadelphia!

- 2026 NAGARA Annual Conference Program Committee

SCHEDULE OF EVENTS

**Monday
July 20**

10:00 AM - 6:00 PM: NAGARA Board of Directors Meeting

**Tuesday
July 21**

7:30 AM – 6:00 PM: Pre-Conference Workshop Registration Open

8:00 AM – 5:00 PM: Full-Day Pre-Conference Workshops (additional registration required)

- "The Basics of Archives: A 101-Level Introduction to Managing Permanent Government Records" (+\$199)
- "The Foundations of Records Management: A 101-Level Introduction to the Essential Responsibilities of Government Records Managers" (+\$199)

8:00 AM – 12:00 PM: Half-Day AM Pre-Conference Workshop (additional registration required)

- "From Overwhelmed to Organized: Practical Approaches to Shared Drive Cleanup" (+\$99)
- "End-to-End Lifecycle Management and Long-Term Preservation in Microsoft 365: Practical Governance Strategies for Records, Archives, and IT Collaboration" (+\$99)

1:00 PM – 5:00 PM: Half-Day PM Pre-Conference Workshop (additional registration required)

- "AI, But Make it Useful: Empowering Teams to Unlock Practical Use Cases" (+\$99)

1:00 PM – 6:00 PM: Exhibitor Move-in / Setup

7:00 PM – 10:00 PM: Opening Welcome Reception at the Museum of the American Revolution (shuttle bus transportation provided), Sponsored by Strategic Partner Iron Mountain Government Solutions

**Wednesday
July 22**

7:30 AM – 5:00 PM: Conference Registration Open

7:45 AM – 8:45 AM: Exhibit Hall Opens (Coffee with Exhibitors)

8:45 AM – 10:15 AM: Opening General Session & Breakfast
(Sponsored by Strategic Partner Preservica)

10:15 AM – 10:30 AM: Session Transition Time

10:30 AM – 11:30 AM: Government Networking Groups

11:30 AM – 11:45 AM: Session Transition Time

11:45 AM – 12:45 PM: Concurrent Session Block 1

- SESSION 01: Clutter to Clarity: Building a Paperless Future with Governance, Metadata, and Risk Management
- SESSION 02: Building a Comprehensive Digital Repository: Strategies for Collaborative Collection Development
- SESSION 03: Training the Trainer: Creating Records Management All Stars
- SESSION 04: From Chaos to Clarity: How the City of Seattle Transformed File Shares into an AI-Ready Data Governance Powerhouse
- SESSION 05: Preserved and Found: Ending the Compliance vs. Accessibility Trade-Off in the Era of Digital Government

12:45 PM – 2:15 PM: Annual Awards Luncheon (Sponsored by Thought Leader CivicPlus)

2:15 PM – 2:30 PM: Session Transition Time

2:30 PM – 3:30 PM: Concurrent Session Block 2

- SESSION 06: AI Didn't Break Your Content Strategy (It Exposed It)
- SESSION 07: Commemorating Katrina in the New Orleans City Archives & Special Collections
- SESSION 08: A Deep Dive Into ICRM Certification
- SESSION 09: Failing Forward: How a Federal Audit Sparked the Framework of a Strong RIM Program
- SESSION 10: Unlocking Intelligent Records: How AI-Driven Document Scanning Transforms Government Workflows

3:30 PM – 4:00 PM: Beverage Break in Exhibit Hall

4:00 PM – 5:00 PM: Concurrent Session Block 3

- SESSION 11: Managing Electronic Messaging at the Teacher Retirement System of Texas

- SESSION 12: Starting from Scratch: Lessons Learned from a New Program in a Historic State Agency
- SESSION 13: You Belong Here: Building a Culture of Belonging and Resilience for First Generation Information Management Professionals
- SESSION 14: Shorter, Faster, Longer? How Chunking Training Increases Retention of Information at University of Illinois
- SESSION 15: Beyond the Gold Rush: A Records Manager's Field Guide for AI Governance

5:00 PM – 6:30 PM: Evening Networking Happy Hour

6:00 PM – 10:00 PM: Open Evening (Dinner and activities on your own)

Thursday July 23

7:30 AM – 5:00 PM: Conference Registration Open

7:45 AM – 8:45 AM: Coffee with Exhibitors

8:45 AM – 10:15 AM: Second Day General Session & Breakfast
(Sponsored by Thought Leader Ricoh Document Scanners)

10:15 AM – 10:30 AM: Session Transition Time

10:30 AM – 11:30 AM: Concurrent Session Block 4

- SESSION 16: Bridging Influence Gaps by Creating an Information Governance Program
- SESSION 17: Work With What You've Got
- SESSION 18: Streamlining Government Event Planning: A Case Study in Planning Milestone Celebrations
- SESSION 19: The Cauliflower Strategy: Sneaking RIM Into Organizational Priorities and Success
- SESSION 20: FORTHCOMING

11:30 AM – 12:00 PM: Coffee Boost/Break with Exhibitors

12:00 PM – 1:00 PM: Concurrent Session Block 5

- SESSION 21: No Drama, No Trauma: Ensuring that Record Disposition is Defensible
- SESSION 22: CPR: Reviving the City of Philadelphia Department of Planning and Development Archives

- SESSION 23: Addressing Invisible Decisions: Bridging the Gaps between Governance Silos in the Vermont Criminal Justice System
- SESSION 24: Thinking Inside the Box: Enhancing Training and Outreach Within Your Organization
- SESSION 25: The Digital First Impression Revisited: New Research on Trust, AI, and Accessibility in Local Government

1:00 PM – 2:30 PM: Lunch (Networking Lunch / Final Time with Exhibitors)

2:30 PM: Exhibit Hall Closes

2:30 PM – 4:45 PM: Exhibitor Breakdown/Move Out

2:30 PM – 3:30 PM: Concurrent Session Block 6

- SESSION 26: 4 Pillars to Compliance: Building Beyond the Policy Foundation
- SESSION 27: Project Development for Managing Congressional Record: Process the Richard C Shelby Collection
- SESSION 28: Mixing Your IG Mission and Message for the Crowd, OR How To Get Your Vocals Heard Across the Roar!
- SESSION 29: Benchmarking AI Readiness in RIM
- SESSION 30: Diversity, Equity, Inclusion, and Accessibility in Archives and Records Programs

3:30 PM – 3:45 PM: Session Transition Time

3:45 PM – 4:45 PM: Concurrent Session Block 7

- SESSION 31: The Value of a Records Management Program Health Check
- SESSION 32: Using Bitmoji to Create Engaging Trainings
- SESSION 33: Practice Makes Prepared
- SESSION 34: Transforming Complexity into Clarity
- SESSION 35: AI Readiness and Cyber Resilience

4:45 PM – 7:30 PM: Dinner on your own

7:30 PM – 10:00 PM: Closing Networking Reception (Millennium Hall Ballroom) | Theme: "Rebels, Reformers, and Record Keepers: A Masquerade 250 Years in the Making"

Friday
July 24

9:00 AM – 10:30 AM: Closing Day General Session & Breakfast
(Sponsored by Thought Leader KnowledgeLake) | "Honoring the Past,
Embracing the Present, Engineering the Future"

11:00 AM – 2:00 PM: Optional Post-Conference Activities & Tours

- Tour A: "Standing Inches from History: A Private Vault Experience" (\$50 per attendee) (Limited to the first 50 paying registrants)
- Tour B: "National Constitution Center Experience" (\$20 per attendee) (Limited to the first 100 paying registrants)

PRE-CONFERENCE WORKSHOP OFFERINGS

TUESDAY, JULY 21
8:00 AM – 5:00 PM

FULL-DAY
PRE-CONFERENCE
WORKSHOPS

COST: \$199.00

*(requires additional
registration)*

INCLUDES:
*Continental Breakfast,
AM Beverage Break,
Lunch, PM
Snack/Beverage Break*

The Basics of Archives: Introduction to Managing Permanent Government Records

This full-day workshop introduces the essential practices for managing government records of permanent historical value. Participants will explore the lifecycle of archival materials, from appraisal and acquisition through preservation, description, and access.

The session covers both physical and digital records, including storage considerations, environmental controls, and strategies for providing access to researchers and the public. Hands-on activities and sample scenarios will help attendees build confidence in managing archival collections.

The Foundations of Records Management: Introduction to the Essential Responsibilities of Government Records Managers

This full-day workshop provides a comprehensive introduction to the core responsibilities of government records managers. Designed for new professionals and evolving programs, the session covers the foundational principles needed to build and sustain effective records management practices.

Topics include developing and applying retention schedules, managing electronic and physical records, maintaining filing systems, and supporting broader information governance initiatives. Attendees will leave with a clearer understanding of key responsibilities and strategies they can apply immediately within their own programs.

TUESDAY, JULY 21

**HALF-DAY MORNING
PRE-CONFERENCE
WORKSHOPS**

COST: \$99.00

*(requires additional
registration)*

INCLUDES:

*Continental Breakfast,
AM Beverage Break*

From Overwhelmed to Organized: Practical Approaches to Shared Drive Cleanup

Cleaning up shared drives can feel overwhelming, especially when years of unmanaged content result in cluttered folders, duplicate files, and unclear retention decisions. This hands-on workshop introduces two practical approaches to shared drive cleanup: a manual review process and a tool-assisted strategy.

Participants will learn how to identify redundant, obsolete, and trivial (ROT) content, apply retention rules in a practical way, and reorganize file structures for improved usability and compliance. Interactive exercises will help attendees confidently begin or advance shared drive cleanup efforts within their organizations.

End-to-End Lifecycle Management and Long-Term Preservation in Microsoft 365: A Cross-Disciplinary Workshop on Governance, Transfer, and Sustainable Stewardship

As organizations increasingly rely on Microsoft 365 to manage digital information, records professionals must address both lifecycle management and long-term preservation. This cross-disciplinary workshop brings together perspectives from records management, information governance, and digital preservation.

Participants will explore how retention labels, policies, and automation tools support lifecycle control within M365, while also learning how to identify records requiring long-term preservation and prepare them for archival transfer. The session highlights strategies to build sustainable, compliant programs that support both operational needs and long-term stewardship.

TUESDAY, JULY 21

**HALF-DAY
AFTERNOON
PRE-CONFERENCE
WORKSHOPS**

COST: \$99.00

*(requires additional
registration)*

**INCLUDES: PM
Beverage/Snack Break**

AI, But Make It Useful: Empowering Teams to Unlock Practical Use Cases

AI adoption often stalls when organizations lack clear goals or fail to prepare their workforce for change. This interactive workshop focuses on turning AI concepts into practical, high-impact applications within Records and Information Management programs.

Participants will learn how to identify meaningful AI use cases aligned with business needs, distinguish between automation and AI solutions, and evaluate initiatives for feasibility and strategic fit. Through guided exercises and real-world examples, attendees will leave with actionable frameworks to scope, plan, and implement AI initiatives that deliver measurable value.

FULL CONFERENCE PROGRAM

CONCURRENT LEARNING SESSIONS

WEDNESDAY, JULY 22
10:30 AM – 11:30 AM

Government Networking Groups

OVERVIEW: NAGARA's Government Networking Groups provide a dedicated space for archivists, records managers, and information professionals to connect with peers facing similar challenges within their specific level of government.

Whether you work at the **federal, state, tribal, or local** level, or within an **institution of higher learning**, these groups offer valuable opportunities to exchange ideas, discuss emerging issues, and share best practices.

Held as one of the very first activities of the conference, these networking groups are the perfect way to kick off your conference experience – helping you make new connections, identify colleagues with shared interests, and start meaningful conversations from day one. And this is just the beginning! Throughout the conference, you'll have many more opportunities to expand your professional network and build lasting relationships with fellow attendees.

WEDNESDAY, JULY 22
11:45 AM – 12:45 PM

CONCURRENT
SESSION BLOCK 1

AC26 | Session 01

Clutter to Clarity: Building a Paperless Future with Governance, Metadata, and Risk Management

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Archives, Records Management, Technology/Tools

Levels: Intermediate

GARA: *forthcoming...*

Overview

As agencies race to digitize, many have focused on scanning paper without establishing the governance structures necessary to ensure legal defensibility, compliance, and long-term access. This session addresses the critical gap between digitization and digital trustworthiness by exploring how to build a paperless-ready agency (one that is not only digital in format, but also compliant, audit-ready, and secure).

This training walks attendees through the foundational elements of a compliant digital records environment, using an electronic content system (ECS) as a case study for an official system of record. We explore how metadata, governance policies, and risk management controls work together to create a trustworthy digital environment that meets federal, state, and local requirements.

Key Topics Covered

- **Governance Structures:** Establishing policies and procedures that support digital compliance (including roles, responsibilities, and oversight mechanisms)
- **Metadata as Compliance:** Required metadata fields for an ECS and how they support audit readiness and legal defensibility
- **Trustworthy Digital Images:** Standards and technologies that make digital records legally equivalent to paper originals
- **Chain of Custody & Audit Trails:** Maintaining integrity and accountability in digital systems (ensuring records are admissible and reliable)
- **Risk Management Controls:** Identifying and mitigating risks in digital records management (including unauthorized access, data loss, and improper disposition)

Learning Objectives

- Understand the components of a compliant digital records environment
- Identify required metadata fields and their role in legal defensibility
- Learn how to implement governance structures that support digital transformation
- Gain tools for assessing and mitigating risk in digital records systems
- Explore real-world examples of ECS implementation and lessons learned

Presenters



Charlene L. Lucero

Records and Information Management Specialist, Bureau of Land Management, Headquarters

Charlene Lucero is a records and information management professional with 19 years of federal service, including 14 years specializing in federal records management. She has led enterprise records governance initiatives focused on electronic records modernization, file plan development, taxonomy design, and strengthening compliance frameworks aligned with federal mandates and cybersecurity priorities.

Charlene has played a key role in advancing digital transformation efforts by integrating records management principles into enterprise

content systems, improving information lifecycle controls, and enhancing accountability across business units. She is passionate about bridging policy and practice—helping agencies move beyond compliance-driven records management toward strategic information governance.

Karen D. Jackson

Records and Information Management Specialist, Bureau of Land Management, National Interagency Fire Center



Karen Jackson is a Records Administrator at the National Interagency Fire Center under the newly established DOI Wildland Fire Service. She serves as Co-Chair of the DOI BLM Records Management Board, contributing to bureau-wide records governance efforts and collaborating with records professionals and leadership on policy implementation, program coordination, and compliance with federal records management requirements. In her role, she provides subject matter expertise that supports the modernization and effective administration of records programs across complex interagency operations.

With 18 years of federal service within the Department of the Interior, Ms.

Jackson has developed a recognized specialty in interagency incident fire records administration. Her work focuses on strengthening records management practices through training, compliance guidance, and practical strategies for managing electronic records in operational environments. Working with dispatch centers and offices across the country, she helps advance consistent and reliable records practices that support operational accountability, transparency, and long-term records stewardship.



Tracy Queensberry

*eERDMS Support Services
(Contractor) for BLM, U.S. Department
of the Interior, Office of the Chief
Information Officer*

Tracy Queensberry is a governance and information management leader focused on advancing paperless transformation through metadata strategy, compliance alignment, and risk-based lifecycle management in complex federal environments. With deep experience bridging policy, operations, and digital modernization, she helps organizations move from fragmented paper processes to sustainable, defensible information ecosystems. Tracy is particularly passionate about turning governance from a compliance burden into a strategic enabler for mission delivery.

AC26 | Session 02

Building a Comprehensive Digital Repository: Strategies for Collaborative Collection Development

Target: Federal, State, Local, Public Institutions of Higher Learning

Focus: Archives, Technology/Tools

Levels: Intermediate

GARA: *forthcoming...*

Overview

The Digital History and Archives team at the Federal Reserve Bank of St. Louis has developed an innovative approach to building comprehensive digital collections across multiple platforms. In this session, practical strategies will be shared for identifying gaps, acquiring materials from diverse sources, and creating cohesive collections that serve both public access and institutional memory.

The Federal Reserve System is a unique public-private hybrid, combining an independent federal agency (Board of Governors) with 12 regional corporations (Reserve Banks). Our team supports three integrated historical information platforms for the Federal Reserve System: FederalReserveHistory.org, the FRASER digital library, and FedPreserve, our internal digital archive. Like many institutions, our physical holdings of historical records are incomplete. This ecosystem creates challenges that require systematic approaches and creative solutions. To build truly comprehensive collections, we look beyond our institutional boundaries—partnering with other libraries, leveraging the Wayback Machine to recover "lost" content from the 1990s and 2000s, and establishing collaborative relationships with other government agencies.

The presentation will include real-world examples from our experience building collections to support a variety of uses, from internal research agendas to public records requests. We will discuss prioritization strategies for evaluating potential collections, demonstrate digital techniques for recovering lost web content, and provide examples of successful collaborative relationships with internal and external partners. The presentation assumes working knowledge of archival concepts and some practical experience in the field.

Learning Objectives

- Explore systematic approaches to identifying critical gaps in collections
- Consider prioritization frameworks that balance historical significance, serving multiple audiences and purposes, and resource constraints
- Learn adaptable approaches to expanding digital collections beyond institutional holdings
- Explore methods for measuring and communicating the impact of collection development efforts to stakeholders

Presenters



Pamela Campbell

Senior Archivist, Federal Reserve Bank of St. Louis

Pamela Campbell is a digital projects librarian and the archivist at the Federal Reserve Bank of St. Louis. In that role, she works to facilitate and promote preservation and use of historical materials from across the Federal Reserve System. She supports FRASER, the digital library of economic



and business history, and the Bank's internal archives.

Genevieve Podleski

*Senior Digital History Librarian,
Federal Reserve Bank of St. Louis*

Genevieve Podleski is a digital history librarian at the Federal Reserve Bank of St. Louis. In that role, she supports both FRASER, the St. Louis Fed's digital library of U.S. economic, financial, and banking history, and FederalReserveHistory.org, the Federal Reserve System's history gateway for educators, students, and the general public.

AC26 | Session 03

Training the Trainer: Creating Records Management All Stars

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Archives, Records Management

Levels: Beginner, Intermediate, Advanced

GARA: *forthcoming...*

Overview

Records Management is a team sport (it is key that everyone is using the same playbook and listens to the coach). A great coach leads an effective training program that empowers employees with knowledge and confidence in recordkeeping. The right plays build a solid training program that keeps your playing field in compliance. The trainer can make or break a

program before everyone takes their seats (how can you create a resilient program that adapts to the challenges of budgets and approval layers)?

This session is aimed at leaders of all levels of experience and addresses key ideas for building a strong collaborative program.

Whether your organization already has a RIM training course in place or you're looking to start one, this session is for you.

Key Topics Covered

- What to consider when selecting a training platform
- Annual reassessments
- Building rapport across the agency (especially with IT and HR)
- Tailoring training to the perspective of the audience
- Incorporating accessibility requirements and aligning communications
- Building early advocates
- Developing a Records Management Master Plan

Using real world successes (and failures), the presenters offer advice on strategic leadership through training to help you build a scalable, sustainable records culture that can pivot with change.

This is not a traditional technical session on training platforms. Instead, it highlights the importance of leadership through relationship building, transparency, and strategic planning. Attendees will learn how to assess current tools and platforms, create a training plan, tailor content to diverse audiences, build rapport across departments, collaborate with IT and legal teams, and use training as a tool for change management and policy reinforcement.

Presenters

**Ashley White**

Records Manager, Division of TennCare

Ashley White is the Records Manager for the Division of TennCare (Tennessee's managed Medicaid/Medicare agency). She brings over 20 years of experience in museums, archives, and libraries. As a team of one, she focuses on records requests, training, data retention and governance; she weighs in on litigation hold and disaster recovery processes as well. Ashley is a former NAGARA mentee, a current mentor, and has also participated in TennCare's mentorship and Leadership Academy. When off the clock, Ashley prefers playing video games, playing with her dog, and continues to involve herself in history as much as possible. Her personal project for 2026 is the restoration and rededication of a Revolutionary War soldier's family cemetery.

**Teshawna Threat**

Records and Information Management Analyst, Library of Virginia

Teshawna has been a Records Management Analyst for the Library of Virginia for over 2 years, holding a certification as a Records and Information Management Analyst from the ICRM. She currently serves as Chair for the ICRM Academic

Partnership Committee, promoting the profession of records management with current graduate students across the nation. Additionally, she serves as the Treasurer of the ARMA International Richmond Chapter.

As a graduate of Louisiana State University, Teshawna proactively works as an alum providing insight into the career background of library services and records management. Working for public libraries for over 16 years, Teshawna became a certified Librarian in 2023, as she is dedicated to the organization and accessibility of information for clients and patrons.

AC26 | Session 04

From Chaos to Clarity: How the City of Seattle Transformed File Shares into an AI-Ready Data Governance Powerhouse

Target: State, Local, Public Institutions of Higher Learning

Focus: Records Management, Technology/Tools

Levels: Beginner, Intermediate, Advanced

GARA: *forthcoming...*

Overview

The City of Seattle faced a familiar challenge: decades of unmanaged data sprawling across file shares, with little visibility or control. Through its partnership with RecordPoint, Seattle transformed this legacy sprawl into a foundation for trusted, AI-ready governance. This session reveals the steps,

lessons, and real-world results from Seattle's journey, showing how automated classification, risk management, and governance insights turned an overwhelming challenge into strategic business value.

This session provides practical, actionable insights into how a public-sector organization can transform unmanaged, high-risk legacy data into a trusted foundation for AI innovation. Using the City of Seattle as a real-world case study, attendees will learn proven strategies, governance models, and implementation tactics they can take back to their own agencies.

Participants Will Gain

1. A clear framework for modernizing legacy file shares (including assessing, classifying, and cleaning up decades of accumulated content).
2. Practical techniques for implementing automated data governance (including automated classification, metadata enrichment, and risk detection that can scale IG without increasing staffing).
3. Lessons learned from a large U.S. city's transformation journey (what worked, what didn't, and what to consider when starting similar initiatives).
4. A defensible approach to preparing government data for AI (ensuring underlying data is compliant, trustworthy, and ethically sound).
5. Skills for building the business case and demonstrating ROI (language, metrics, and talking points for leadership, auditors, and elected officials).
6. Real-world examples of AI use cases for government (how Seattle leverages governed data today and what future AI-enabled services are planned).

In summary, attendees will leave with practical tools, proven approaches, and an inspiring real-world example showing how

data governance is not just compliance work (it is the essential foundation for digital transformation and AI-enabled government service delivery).

Presenters



Andrea Bettger

City Records Management Analyst (Sr.), City of Seattle

Andrea has been a Records Analyst with the City of Seattle since 2002. She previously worked in archives and records management with the Oregon Historical Society, Lummi Indian Business Council, and the City of Portland. Bettger was an active member of ARMA International (Greater Seattle Chapter) from 2003 to 2020 and served multiple roles including chapter president. She is active in NAGARA and currently serves as one of the local government representatives on the board. Bettger has a Bachelor of Arts in History from Portland State University and a Masters-in-History with emphasis in Archives and Records Management from Western Washington University.



Kris Brown

EVP Evangelism, Partners and Solutions Engineering, RecordPoint

Kris Brown is Executive Vice President of Solution Engineering at RecordPoint, where he helps organizations move from governance to growth. With more than 20 years in

enterprise content and information management, Kris has led technology change across Australia, New Zealand, the UK, and the US. He brings deep expertise in the needs of highly regulated industries and how trust and transparency underpin successful data strategies. Today, Kris is focused on how data governance and AI come together, enabling organizations to protect sensitive information, meet compliance demands, and confidently unlock new innovation.

AC26 | Session 05

Preserved and Found: Ending the Compliance vs. Accessibility Trade-Off in the Era of Digital Government

Target: Federal, State, Local, Public Institutions of Higher Learning

Focus: Records Management, Digital Preservation, Technology/Tools

Levels: Beginner, Intermediate

GARA: *forthcoming...*

Overview

For 250 years, US government records have preserved accountability, safeguarded public memory, and underpinned civic trust. Today, US government records managers are navigating a landscape of digital transformation, mounting legacy system debt, and the accelerating demands of AI-

enabled government. The stakes for getting this right have never been higher. The old trade-offs are no longer acceptable.

This session introduces Preserve365 — purpose-built for government records environments and embedded directly within Microsoft 365 — delivering the compliance assurance of digital preservation and the discoverability of modern collaboration tools, simultaneously, without compromise. Through real-world use cases and practical examples drawn from government agencies already making this shift, attendees will leave with concrete strategies they can apply immediately.

What You'll Learn

- How to achieve both compliance and accessibility — without compromise. Search, view, and verify preserved records directly in SharePoint — without sacrificing compliance rigor or long-term integrity.
- How to safely decommission legacy systems. Learn how Preserve365 provides a safe exit path — migrate with confidence, knowing records retain full metadata, integrity, and long-term readability inside Microsoft 365.
- How to make decades of records AI-ready. Learn how Preserve365 turns your long-term records into a trusted, accessible asset your organization can act on today and build on tomorrow.

Each learning objective is grounded in practical examples from agencies at different stages of digital transformation — so whether you're just getting started or already mid-migration, you'll find strategies relevant to where you are.

The records profession's enduring mission — preserving accountability and public trust — is not in tension with digital transformation. It's what makes transformation trustworthy.

Presenter



Mike Davis

Senior Solutions Architect, North America, Preservica

Mike Davis is a senior solution architect for North America for Preservica. Over his 30+ year career, he has been involved in numerous roles within software organizations. He has helped large and small customers alike in public and private industry bring transformative solutions to a broad array of business challenges. He is based in the Boston area where Preservica maintains its North American headquarters.

WEDNESDAY, JULY 22
2:30 PM – 3:30 PM

CONCURRENT
SESSION BLOCK 2

AC26 | Session 06

AI Didn't Break Your Content Strategy (It Exposed It)

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Archives, Records Management, Technology/Tools

Levels: Intermediate, Advanced

GARA: *forthcoming...*

Overview

Generative AI tools such as ChatGPT, Gemini, and Copilot have dramatically lowered the barrier to content creation across the enterprise. While this acceleration unlocks productivity and innovation, it also introduces a new and often underestimated

challenge: an unprecedented explosion in the volume, variation, and velocity of organizational content.

This session explores the second-order effects of AI-driven content creation and why traditional approaches (such as shared drives and ad-hoc file management) are no longer sufficient. Attendees will examine how unclear authorship, uncontrolled duplication, and unmanaged content lifecycles create governance, compliance, and operational risks.

The session argues that content governance and Enterprise Content Management (ECM) are no longer optional investments (they are foundational capabilities for organizations operating in an AI-enabled world). Participants will leave with a practical understanding of why governance must evolve alongside AI adoption and how ECM provides the structure needed to manage content at scale.

Key Topics Covered

- How generative AI changes the scale and speed of content creation
- Why shared drives and folder-based storage break down in an AI-enabled workplace
- Emerging risks around content authorship, version control, and accountability
- The role of content governance in managing AI-generated and human-authored content
- Why Enterprise Content Management is becoming a strategic requirement (not an IT upgrade)

Learning Objectives

- Anticipate governance challenges introduced by AI-generated content (authorship, version sprawl, erosion of authoritative records)

- Apply records management and information governance principles to AI-created and AI-assisted content (retention, disposition, compliance)
- Assess risks of relying on shared drives and ad-hoc storage in AI-enabled environments (especially public-sector and regulated organizations)
- Identify core ECM capabilities that support authenticity, lifecycle control, auditability, and defensible governance
- Engage IT, legal, and leadership using clear, non-technical language to explain why governance must evolve alongside AI adoption
- Develop a readiness mindset for evaluating whether current policies, tools, and practices are sufficient for managing content at AI scale

Practical Takeaways

- Inform policy updates
- Support system selection or modernization discussions
- Guide organizational conversations about risk, compliance, and accountability in an AI-enabled future

Presenters



Alexander (Alex) Webb

Regional Director of Client Engagement, IQ Business Group

Alexander (Alex) Webb, CRM, IGP, is the Director of Client Engagement for IQBG and has over 17 years of experience in the development and implementation of RM programs and ECM systems for local governments. Prior to joining IQBG, Alex was a Senior Business Process Consultant for the

City of Austin, Texas where he oversaw implementation projects of the city-wide ECM and provided continued life-cycle support of the system. Alex also served as chair of the City's Information Management Governing Board, developing city-wide policies and standards to support RM/ECM best practices within the City's information technology governance framework. As the Records and Information Management Officer for the Capital Metropolitan Transportation Authority, Alex developed the authority's RM program strategic framework and oversaw the migration of their digital assets to a new ECM system. Alex is a Certified Records Manager (CRM), an Information Governance Professional (IGP), and holds a Bachelor of Public Administration from Texas State University.



Kelly Murphy

Records Administrator, Trinity River Authority of Texas

Kelly is a graduate from the University of North Texas with a Master's degree in Library Science and a graduate certificate in Archival Management. Kelly attained her CRA from the Institute of Certified Records Managers (ICRM) in 2025, and is currently working towards her CRM. She holds undergraduate degrees from

Baylor University in Environmental Studies and Psychology.

Kelly Interned with Dallas Municipal Archives, where she learned archival practices and gained experience with arrangement and description, creating finding aids, digitizing images, and preservation.

She is currently employed by Trinity River Authority of Texas where she is building a functioning records management program and developing a historical and accessible archive.

AC26 | Session 07

Commemorating Katrina in the New Orleans City Archives & Special Collections

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Archives, Records Management, Technology/Tools

Levels: Intermediate

GARA: *forthcoming...*

Overview

As the City of New Orleans approached the twentieth anniversary of Hurricane Katrina in 2025, the City Archives & Special Collections positioned itself as a leading resource for the City. This included gathering research materials for public access and city officials, serving on the City's Katrina 20 Commission, and planning programming, outreach, and exhibits around Katrina resources.

Compiling Katrina-era municipal records proved daunting. When disasters unfold in real time, records are not always

preserved and conflicting narratives can emerge. Engaging the public around Hurricane Katrina can also be emotionally challenging for everyone involved.

In this session, presenters will share their experience documenting disaster, adapting to changing avenues of information sharing, navigating the shift from physical to digital records, and participating in commemorating the twentieth anniversary of Hurricane Katrina. Attendees will gain a practical framework for preserving disaster records, engaging the public sensitively, and presenting conflicting narratives ethically.

Presenters



Brittanny Silva

Archivist, New Orleans City Archives & Special Collections

Brittanny Silva is an Archivist and Certified Records Manager at the City Archives & Special Collections in New Orleans. Her expertise includes municipal records, property research, digital preservation, records management, and disaster planning. She holds an MLIS from Louisiana State University and was born and raised in New Orleans.



Christina Bryant

Director, New Orleans City Archives & Special Collections

Christina Bryant is the Director of the New Orleans City Archives & Special Collections and has been with the department since 2013. A Certified Archivist with an MLIS and a native New Orleanian, she focuses on

preserving municipal records and the culture they reflect. She previously worked on Hurricane Katrina records recovery projects and served as an archivist at the New Orleans Notarial Archives. Her work centers on making City government history accessible and meaningful to the public.

AC26 | Session 08

A Deep Dive into ICRM Certification

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Records Management

Levels: Beginner, Intermediate

GARA: *forthcoming...*

Overview

This session provides a practical overview of achieving certification with the Institute of Certified Records Managers (ICRM), featuring a group of experienced Certified Records Managers (CRM) who have successfully navigated the ICRM Certification process.

We will share their journeys within the RIM profession, discuss their experiences with the CRM/CRA exams, highlight the career benefits of these certifications, and provide advice for those deciding between the CRM and CRA certification options.

Attendees can expect to gain a well-rounded perspective of the certification process along with personal stories about how ICRM certifications can support professional growth. This is an interactive session and questions from the attendees is

encouraged and to leverage the wealth of knowledge shared by the panelists through their firsthand experiences.

Presenter



Wendy McLain

President, ICRM

Wendy McLain, MLIS, CRM is a veteran RIM/IG leader with 30+ years of experience across government, healthcare, engineering, and energy sectors, where she partnered with IT, Legal, Compliance, and other teams to drive smarter processes, stronger compliance, and meaningful information governance improvements. A believer in giving back, she has served in international leadership roles including the ICRM Board (2012–18; 2025–present) and the ARMA International Board (2019–2024), including serving as President of both organizations. After returning to Baton Rouge in 2024 (trading HEB and tortillas for LSU tailgating and gumbo!) Wendy joined LSU’s School of Information Studies as an Assistant Professor of Professional Practice, where she leads the Graduate Certificate in Records & Information Management and mentors emerging professionals.

AC26 | Session 09

Failing Forward: How a Federal Audit Sparked the Framework of a Strong RIM Program

Target: Federal

Focus: Archives, Records Management

Levels: Beginner

GARA: *forthcoming...*

Overview

A sub-par federal audit is never the desired outcome for any organization. Yet for many institutions, audits are the moment when long-standing gaps in records and information management (RIM) finally come into full view. This session presents a real-world participatory action research case where a federal audit uncovered systemic weaknesses in records practices—and how those findings became the catalyst for building a comprehensive, defensible, and sustainable RIM framework that has been pressure tested on two subsequent federal audits.

The session begins with the audit context: an organization operating under the assumption that its practices were “good enough.” While basic policies existed and staff were making good-faith efforts, the audit revealed inconsistent retention practices, unclear ownership of records, limited documentation standards, and a lack of enterprise-wide governance. Rather than responding with short-term corrective actions designed only to close audit findings, leadership chose to “fail forward,” shifting from reactive compliance to proactive information governance.

To strengthen enforcement and implementation of evolving Department of Defense regulations, the organization established an Accountability Officer role (the first of its kind in a Federally Funded Research & Development Center to single-handedly manage classified collections). Audit findings were treated not as isolated issues to fix, but as indicators of deeper

structural problems requiring a coordinated, strategic response.

Participants will be guided through the turning point where leadership commitment and organizational buy-in transformed the audit response from a checklist exercise into a foundational initiative. The session explores root causes such as unclear accountability, limited staff training, siloed systems, and the misconception that RIM was not a foundational component of compliance readiness.

The core of the session covers the step-by-step development of a strong RIM framework. Attendees will learn how governance structures were established to define ownership, roles, and responsibilities across departments (in adherence to regulations), and how policies and standards were created and aligned (including record schema, retention schedules, and audit-ready documentation practices). Emphasis is placed on making policies practical and integrated into daily workflows (not just written guidance).

Equally important is training and culture change: moving beyond one-time sessions to ongoing education, reinforcement, and shared responsibility. This session also introduces attendees to a DoD special collection environment and the unique challenges faced when RIM compliance is under-credited, showing why resilience and adaptability matter in building an audit-ready program.

Presenters



Emma Rose Powers

Accountability Officer, MIT Lincoln Laboratory

With a blended academic background in national security/homeland security and library science/archives & special collections, Emma offers an unseen lens to a role that preserves critical

data. As an Accountability Officer, she provides liability and order in a blend of security and information management that embodies mastery of control.

Emma specializes in multimedia special collection archives. She is currently an Accountability Officer (Special Security Representative III) at MIT Lincoln Laboratory, responsible for enforcing security regulations and government policies to facilitate national security missions. Tasked with managing material life cycles and their records, she acquires, arranges, describes, stores, preserves, manages, and inventories over 1,600 items in her repository.

Her education includes a Bachelor of Science in Criminal Justice (Johnson & Wales University), a Master of Arts in Strategic Intelligence and Analysis with a concentration in Homeland Security (Northeastern University), and she is a candidate for a Master in Information & Library Science and Archives and Special Collections certificate (University of Southern Mississippi).

Emma serves on several NAGARA committees, holds a GARA certificate, is vice president for the Library and Information Science Student Association (LISSA), and is a member of professional organizations including

the Society of American Archivists (SAA), New England Archivists (NEA), and the Special Libraries Association (SLA).



Jeremy Bartee

Accountability Officer, MIT Lincoln Laboratory

Jeremy Bartee is an intelligence and security professional with more than 17 years of experience supporting national security, sensitive program oversight, intelligence operations, and personnel security. Currently serving as an Accountability Officer at MIT Lincoln Laboratory, he specializes in classified material control, security program compliance, operational risk management, and records and information management (RIM) practices that ensure accountability, audit readiness, and regulatory compliance in high-security environments.

A former United States Marine Corps Intelligence and Security Chief, Jeremy has led intelligence operations, security programs, and multinational field investigations across the Indo-Pacific region, including POW/MIA recovery missions and disaster response support. His experience includes developing information governance processes, managing sensitive records lifecycles, and translating regulatory requirements

into practical operational procedures that support mission effectiveness and information integrity.

Jeremy is recognized for his practical leadership approach, strong communication skills, and ability to bridge operational requirements with strategic security and information management objectives. He brings a real-world perspective on security compliance, audit preparedness, leadership, and modern RIM practices.

AC26 | Session 10

Unlocking Intelligent Records: How AI-Driven Document Scanning Transforms Government Workflows

Target: Federal, State, Local, Public Institutions of Higher Learning

Focus: Records Management, Technology/Tools, Digitization

Levels: Beginner, Intermediate

GARA: *forthcoming...*

Overview

As government agencies face growing pressure to modernize, the combination of AI and advanced document scanning has become a critical catalyst for improving efficiency, accuracy, and citizen service delivery. In this session, Ricoh will explore how AI-enhanced document capture is reshaping records management (from automated indexing and metadata creation to smart classification and compliance-ready digital archives).

Attendees will learn how modern scanning technologies streamline workflows, reduce manual processing, accelerate digitization initiatives, and create more accessible and actionable information ecosystems. By transforming paper-based processes into intelligent digital workflows, agencies can strengthen governance, increase transparency, and better support mission-critical operations.

Whether you are beginning your digital transformation journey or optimizing an existing program, this session highlights practical strategies and real-world use cases tailored specifically to the needs of government archivists and records professionals.

Attendees Will Gain

- An understanding of how AI-enhanced document capture improves indexing, metadata creation, and classification
- Practical approaches to reducing manual processing and improving workflow efficiency
- Strategies for building compliance-ready digital archives from scanned content
- Insights into real-world government use cases and measurable operational benefits
- Considerations for integrating intelligent scanning into broader modernization and records governance initiatives

Presenter



**Vaughn Minger, AIIM CIP, ECMM,
CaptureP**

*National Sales Manager, Eastern
Region and Federal, PFU America,
Inc., a Ricoh Company*

*Vaughn Minger brings more than 27
years of experience in the document*

imaging and records management industry. A past AIIM chapter president, Vaughn combines deep scanner technology expertise with extensive knowledge of enterprise capture solutions and information governance practices. He works closely with public-sector organizations to modernize document workflows, strengthen compliance, and enable intelligent records ecosystems that support long-term operational efficiency.

WEDNESDAY, JULY 22
4:00 PM – 5:00 PM

CONCURRENT
SESSION BLOCK 3

AC26 | Session 11

Managing Electronic Messaging at the Teacher Retirement System of Texas: Bringing Calm to the Chaos (One Policy at a Time)

Target: Federal, State, Local, Public Institutions of Higher Learning

Focus: Records Management

Levels: Beginner, Intermediate

GARA: *forthcoming...*

Overview

In January 2025, the Teacher Retirement System of Texas (TRS) implemented an electronic messaging policy that automated retention of emails and Microsoft Teams chats across the agency. This session is a case study on the multi-year effort to implement the policy.

Topics Covered

- Technical elements of policy implementation using Microsoft Purview

- Efforts to gain executive and agency backing of the policy
- Change management strategies deployed during implementation
- Training methods and best practices for email management
- Approaches to capturing email records and lessons learned after deployment

Audiences will gain a better understanding of change management strategies for implementing electronic messaging policies.

Key takeaways include methods for training organizations on best messaging practices and capturing records in messaging. Participants will also learn about unique challenges posed by Microsoft Teams messaging and mitigation strategies for capturing chat records, along with practical guidance for implementing messaging governance using Microsoft Purview.

Presenter



Claire Ridley

Records Analyst, Teacher Retirement System of Texas

Claire Ridley is a Records Analyst at the Teacher Retirement System of Texas and is a Certified Records Manager. Her experience at TRS includes Microsoft Purview implementation, change management strategy, and retention schedule management. She holds a Bachelor of Arts in Archaeology and Classics from Saint Anselm College and a Master of Science in Information Studies from the University of Texas at Austin.

AC26 | Session 12

Starting from Scratch: Lessons Learned from a New Program in a Historic State Agency

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Archives, Records Management, Technology/Tools

Levels: Intermediate

GARA: *forthcoming...*

Overview

The Massachusetts Bay Transportation Authority delivers regional transit services within a 100+ year-old institutional context. Until 2023, however, it and its predecessor entities had no central records, archives, or information management program. This gap created significant risk for the Authority, particularly in an environment of limited resources from oversight agencies and the State Archives.

Deputy directors for the RIM and Archives/Digital Asset Preservation workstreams will share lessons learned to date on obtaining stakeholder buy-in, embedding best practices in archives management, and advocating for strengthened records retention policies applicable across local, tribal, state, and federal government environments.

Learn how a small team built champions outside their department, introduced new systems while managing legacy paper backlogs, and navigated a hybrid physical-digital environment. The presenters will also discuss how collaboration with peer agencies helped build momentum and institutional support.

Participants will gain practical guidance on identifying allies, managing change during system implementation, addressing legacy backlogs, and integrating governance practices into

daily workflows—particularly in organizations where a formal RIM program did not previously exist.

Presenters



Alison Anderson

Deputy Director, Archives and Digital Asset Preservation, Massachusetts Bay Transportation Authority

Alison Anderson is a Certified Archivist (CA), Digital Archives Specialist (DAS), and holds a master's degree in library and information science with a concentration in archives management from Simmons University. She has previously served as senior cochair of the Society of American Archivists Design Records Section and as a member of the SAA Digital Design Records Taskforce.

With over fifteen years of experience working with visual materials (including architectural and construction records), her interests include enhancing metadata, improving workflows, and creating connections across systems and collections to improve the user experience.



Sarah R. Demb

Deputy Director, Records & Information Management, Massachusetts Bay Transportation Authority

Sarah R. Demb is the MBTA's first Deputy Director of Records and Information Management, responsible for establishing the RIM program and spearheading updates to the Massachusetts Statewide Records Schedule to include MBTA operations records.

Prior to 2024, she served as Senior Records Manager/Archivist at the Harvard University Archives for a decade. She has also worked as Museum Archivist and Records Manager for the Museum of London, Records Management Advisor for the London Museums Hub, and Project Manager at the International Records Management Trust.

She holds an MLIS from the University of Texas at Austin and is co-author of Records Management for Museums and Galleries: An Introduction (Chandos Publications, 2012). She has contributed to The Handbook of Archival Practice (Rowman & Littlefield, 2021) and Museum Archives: Practice, Issues, Advocacy (SAA Publications, 2022).

You Belong Here: Building a Culture of Belonging and Resilience for First Generation Information Management Professionals

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Archives, Records Management

Levels: Beginner, Intermediate

GARA: *forthcoming...*

Overview

As the field of Information Management (IM) evolves, a new generation of professionals is entering the workforce, many of whom are the first in their families or organizations to pursue careers in this discipline. These “first-generation” IM professionals often navigate complex environments without established networks, mentors, or clear pathways for advancement.

This session explores how organizations and leaders can foster a sense of belonging, inclusion, and professional identity among first-generation practitioners. Drawing on insights from organizational development, equity in professional learning, and real-world examples, this presentation highlights strategies to create mentorship pipelines, inclusive onboarding, and professional cultures that empower diverse IM talent. Participants will gain practical tools to strengthen engagement, retention, and innovation within their teams and institutions.

This session directly supports NAGARA’s mission to advance the professional practice of information management by addressing the human dimension of our work. As IM becomes increasingly interdisciplinary, the profession must attract and retain diverse talent with varied academic and cultural backgrounds. By spotlighting first-generation professionals,

this session helps organizations align their culture with innovation, inclusion, and long-term sustainability.

By the end of this session, participants will be able to:

1. Define what it means to be a “first-generation” professional in the field of Information Management.
2. Recognize the challenges and strengths first-generation professionals bring to IM workplaces.
3. Apply practical strategies to build inclusive learning, mentorship, and leadership pipelines.
4. Design cultural practices that foster psychological safety and belonging across IM teams.

Presenter



Dr. Julia Mewbourne

Manager, Records Management & Imaging Services, Metropolitan Water District of Southern California

Dr. Julia Mewbourne is an accomplished information governance and public administration leader with expertise in records management, organizational strategy, and transformational project delivery. She oversees digital and physical information assets, archive and library services, reprographics operations, and enterprise-wide data governance initiatives.

Julia is both a practitioner and a scholar. She holds a Doctor of Public Administration (her dissertation focused on creating cultures of belonging to support first-generation graduate students), a Master of

Education in Human Resource Development, and is a certified Information Governance Professional (IGP). She also teaches public policy and urban studies courses as an adjunct faculty member.

Her work centers on designing and implementing solutions that balance compliance, efficiency, and innovation. She has led enterprise records conversion efforts and launched new technology platforms to improve information access, reduce operational risk, and integrate sustainable service models.

Julia frequently presents on topics at the intersection of governance, leadership, and information strategy and has been featured at national conferences including ARMA, MER, and InfoGovCon.

AC26 | Session 14

Shorter, Faster, Longer? How Chunking Training Increases Retention of (Learned) Information at the University of Illinois

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Records Management

Levels: Beginner, Intermediate, Advanced

GARA: *forthcoming...*

Overview

Training and outreach are core components of any records management program, but choosing the most effective approach can be challenging. This session focuses on a crucial and often overlooked element of program sustainability: how to make training effective, memorable, and usable in day-to-day work.

Learn how the University of Illinois is increasing visibility and adoption of records management services through short, focused, single-topic videos (and effective outreach during orientation and trainings). The presenter will share what they've learned from creating orientation materials, and why "chunked" training has helped increase both engagement and use of RM services.

Attendees will leave with practical ideas for improving awareness, increasing use of RM services, and strengthening any step of their training and outreach process—regardless of agency size, structure, or maturity level.

Presenter



G Mast

*Records Management Coordinator,
University of Illinois*

G graduated from the University of Texas at Austin with a Master's in Library and Information Science and has a prior background in education. They have been a coordinator for records management at the University of Illinois since 2023. During their tenure, they have worked to increase the effectiveness of training and outreach for the Records and Information Management Services team.

AC26 | Session 15

Beyond the Gold Rush: A Records Manager's Field Guide for AI Governance

Target: Local, State, Federal, Tribal, Public Institutions of Higher Learning

Focus: Records Management, Information Governance, AI

Levels: Intermediate, Advanced

GARA: *forthcoming...*

Overview

As the public sector races to adopt artificial intelligence, the “regulatory paradox” has reached a fever pitch. Agencies are no longer just exploring the frontier (they are feeding their records into AI engines).

For records managers and archivists serving as the “Territorial Marshals,” the challenge has shifted. You are no longer just protecting static boxes or servers (you are managing the fuel for AI-powered workflows). This session focuses on how to ensure your agency’s transition to AI is built on a foundation of compliant, secure, and well-managed information.

What We’ll Cover

- **Defensible Data Minimization:** Ensure only necessary records are accessible to AI (reducing “garbage in, garbage out” risk).
- **Modernizing Retention for AI:** Update “need-to-keep” policies so tools don’t ingest (or hallucinate from) expired or obsolete records.
- **Advocating for Information Privacy:** Speak the language of privacy to IT and vendors so AI architectures respect sensitive citizen data.

- **Validating the Output:** Define the records manager's role in human-in-the-loop systems to keep AI-generated content accurate, authentic, and trustworthy.

The AI landscape will keep shifting, but your role as the arbiter of trust is more critical than ever. Join us as we workshop practical governance strategies that move agencies from unregulated innovation to secure, records-compliant transformation.

Presenter



Nathan Wright

Senior Manager of Marketing, Iron Mountain Government Solutions

Nathan Wright is the senior manager of marketing for Iron Mountain Government Solutions. Residing in New York City, he has a passion for information-driven innovation, and has been experimenting with and driving AI adoption for nearly a decade.

THURSDAY, JULY 23
10:30 AM – 11:30 AM

CONCURRENT
SESSION BLOCK 4

AC26 | Session 16

Bridging Influence Gaps by Creating an Information Governance Program

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Records Management, Technology/Tools

Levels: Intermediate, Advanced

GARA: *forthcoming...*

Overview

This session explores what Information Governance (IG) programs look like in government environments and how they can transform compliance, collaboration, and organizational outcomes. Attendees will examine the seven principles of Information Governance as defined in ARMA International's "The Principles" and The Information Governance Implementation Model (IGIM 2.1) and see how those principles translate into practical actions.

Drawing on real-world experience, the presenter will share lessons from the trenches and demonstrate how Information Governance can strengthen records-keeping standards, build institutional credibility, and bridge influence gaps across departments.

Participants will gain an understanding of the Information Governance Maturity Model and leave with actionable steps to identify strategic goals, increase institutional support, and build cross-functional buy-in that elevates the role of RIM professionals across the organization.

Presenter



Megan M. Sokolow, MLIS, CRM, CIP

*Records Management Officer,
Livingston County, New York*

Megan Sokolow is the Records Management Officer for Livingston County, NY. She is passionate about local government records, building a sustainable model of Information Governance that blends archival preservation with risk management, and increasing general interest in government archives work.

Megan's goal for her County is democratizing access to strong information governance through

outreach, education, and advocacy. She holds a Master's in Library and Information Science, is an AIIM-Certified Information Professional (CIP), and an ICRM-Certified Records Manager (CRM). Of all her accomplishments, she is most proud of convincing her two teenage children that information governance is interesting.

AC26 | Session 17

Work With What You've Got

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Technology/Tools

Levels: Beginner

GARA: forthcoming...

Overview

As an information specialist, you have no shortage of new programs pitched as “the” solution—especially amid all the recent noise around AI. But are you making the most of the tools you already have in your toolbox? This session focuses on practical, accessible ways records management professionals can leverage common Microsoft programs that most organizations already use.

You'll Explore

- Loop vs. OneNote vs. Wikis for building accessible project history with fewer versions
- Spreadsheets vs. Lists for tracking retention and record types

- Teams and SharePoint archiving features (manual and automated) to identify records nearing retention

The session also covers how to use these familiar tools as a jumping-off point with colleagues to adopt best practices around their own content management.

Whether or not you have access to cutting-edge AI tools, you can leave with clear, actionable approaches for improving day-to-day content habits and strengthening records management outcomes using Microsoft programs your organization likely already has.

Presenter



Anne Pederson

Program Manager, Content and Collaboration, Metro Transit (Metropolitan Council)

Anne brings more than 20 years in customer experience—first as a librarian, then as a web content specialist for Hennepin County in Minneapolis, and now as the content management lead at Metro Transit. She is passionate about bridging the digital divide for customers by meeting them where they are and encouraging a dialogue about how technology can simplify (rather than complicate) daily work. She received her Bachelor of Arts in history from the University of St. Thomas (St. Paul, Minnesota) and a dual Master of Library Science and Master of Arts in History from Indiana University (Bloomington).

AC26 | Session 18

Streamlining Government Event Planning: A Case Study in Planning Milestone Celebrations for Veterans Health Administration Hospitals

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Archives, Technology/Tools

Levels: Beginner, Intermediate

GARA: *forthcoming...*

Overview

Milestone anniversaries call for celebration. Ahead of America 250, the Veterans Affairs History Office (VAHO) partnered with the Library of Congress's Federal Research Division (FRD) to create celebration planning guidance that streamlines event planning for the VA's milestone anniversaries. Because event planning can vary widely, FRD built a practical resource to ground planning efforts, including a landscape scan, considerations and recommendations, a planning worksheet, a sample timeline, and an example packet of celebration materials.

Prior to the creation of this guidance in 2025, there was no baseline for milestone celebrations across Veterans Health Administration (VHA) hospitals: no centralized examples, references, or guidelines. To address this, FRD reviewed past celebrations and best practices across VHA hospitals and comparable organizations in the federal and private sectors (including the Forest Service, National Park Service, GAO, GSA, American Heart Association, and Shriners Hospital for Children). These efforts helped establish a baseline of common events and activities and produced recommendations for implementation.

The FRD team also drew on institutional archives to inform the guidance and provide example materials for future teams to

reference. FRD will discuss how VAHO has utilized the guidance to plan milestone celebrations across the VHA and how they expect to use it going forward.

The session will also explore how systematized planning tools can help bridge archives and public audiences by supporting engaging, public-facing events that utilize agency archival and historical records. Following the presentation, the presenters will invite audience questions and discussion on celebration planning and public engagement.

Presenters



Marianna Fotakos

Senior Researcher, Library of Congress, Federal Research Division

Marianna Fotakos is a senior researcher with the Federal Research Division at the Library of Congress. She is a trained anthropologist with degrees from Louisiana State University and the George Washington University. Marianna specializes in qualitative research (including interviews, qualitative analysis and coding), historical research, landscape scans on federal topics, knowledge management processes, and oral history.



Elisia Bendy

Research Assistant, Library of Congress, Federal Research Division

Elisia Bendy has served as a research assistant at the Federal Research Division (FRD) within the Library of Congress since late 2023. She has helped produce history documents,

oral histories, and social science analyses, and has performed metadata tagging in service of federal clients. Before FRD, she held research and assistant roles with the Smithsonian and at her university's library. She holds a bachelor's degree in American studies.

AC26 | Session 19

The Cauliflower Strategy: Sneaking RIM Into Organizational Priorities and Success

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Records Management

Levels: Beginner, Intermediate, Advanced

GARA: *forthcoming...*

Overview

Records management is more than compliance—it is a strategic enabler. Yet traditional “one-size-fits-all” RIM messaging is often ignored. This session introduces the “Cauliflower Strategy”: blending RIM into broader organizational initiatives so it is embraced with less resistance and greater impact.

Presenters will explore how records professionals can build creative partnerships and position records management as part of the solution to organizational challenges (rather than an unfunded mandate). You'll hear practical ideas for increasing visibility, making the case for additional resources, and rallying support from new allies.

Attendees Will Learn How To

- Identify and engage partners who can champion RIM in unexpected ways
- Integrate RIM into broader organizational initiatives
- Flip the script from generic messaging to tailored impact
- Proactively identify risk implications where RIM adds value
- Mobilize allies to support business cases for increased RIM resources

Leave with a refreshed mindset for positioning RIM as a proactive, future-ready partner that drives organizational success.

Presenters



Pari Swift

University Records Manager, The Ohio State University

Pari Swift is the University Records Manager for The Ohio State University. She partners with IT, security, privacy, compliance, public records, and legal affairs on intersecting initiatives. Previously, she developed the records management program at the Ohio Attorney General's Office and began her career at the State Archives of Ohio.

Pari is active in NAGARA as Professional Development Committee Chair and has served as past President and Treasurer. She holds a Master of Library and Information Science from the University of



Pittsburgh and became a Certified Records Manager in 2014.

Heather Hahn

Records Manager, Nevada Department of Transportation

Heather Hahn is the Records Manager for the Nevada Department of Transportation (NDOT), where she ensures information is organized, secure, and accessible for staff and the public. She holds a Master's in Archives and Records Administration from San José State University.

Formerly a crime scene investigator, Heather brings strong attention to detail and a commitment to best practices to her information governance work. She is passionate about outreach and positioning records management as a strategic resource—not just a requirement.

AC26 | Session 20 FORTHCOMING...

**THURSDAY, JULY 23
12:00PM – 1:00 PM**

**CONCURRENT
SESSION BLOCK 5**

AC26 | Session 21

No Drama, No Trauma: Ensuring that Record Disposition is Defensible

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Archives, Records Management, Technology/Tools

Levels: Beginner

GARA: *forthcoming...*

Overview

Defensible disposition is the justifiable disposal of records that no longer need to be retained according to approved Retention and Disposal Schedules and that are not subject to legal holds. Defensible disposition is authorized, irreversible, and auditable. To ensure the process is defensible, custodians need standard operating procedures that confirm the correct records were identified as eligible, disposal activities were authorized, documented for auditing, and executed through transparent, predictable, and consistent steps with built-in quality controls.

The State of Michigan Records Management Services (RMS) was established by Michigan law in 1952 and brings over 70 years of experience delivering defensible disposition for paper and electronic records. RMS supports government agencies in managing records and information in effective, cost efficient, and legally compliant ways across all levels and branches of Michigan government.

RMS has operated a records center since 1954 with capacity for more than 500,000 cubic feet of records. The State Records Center receives and disposes of approximately 20,000–30,000 physical containers annually. RMS also supports electronic document management through Content Manager; as of 2025, the system housed 49.5 million records (33 TB), supporting 4,400 users across 140 agencies.

Over time, RMS developed process maps, SOPs, and detailed instruction manuals with built-in quality controls to ensure eligible records are destroyed defensibly. These manuals are supplemented by tracking tools, document templates, communication templates, and filing systems that support each disposal cycle end-to-end.

RMS is also developing tools and approaches to help IT teams adopt defensible disposition practices for applications that create and store electronic records. Because disposition is rarely defined as a business requirement during system acquisition and development, systems often lack the controls and procedures needed for systematic disposition and legal holds. Michigan is working with multiple teams to define requirements, adopt planning forms, and publish model workflows that promote quality control and defensibility.

Attendees will benefit from Michigan's extensive experience and will receive procedures and tools they can adapt to their own organization for both paper and electronic records disposition.

Presenters



Caryn Wojcik

*Senior Government Records Analyst,
State of Michigan, Records
Management Services*

Caryn Wojcik is the Senior Records Analyst for the State of Michigan Records Management Services. She began working for the State of Michigan in 1996 and is responsible for developing Retention and Disposal Schedules, supporting information governance initiatives, and training government employees on best practices for records management.

Ms. Wojcik earned her bachelor's degree in history (1993) and master's degree in information and library science (1995) from the University of Michigan (Ann Arbor) and is a Certified Archivist (Emeritus). She served as Secretary to the NAGARA Board (2003–2012), was elected to the NAGARA presidential track in 2019, served as President (2020–2021), and currently serves as the NAGARA representative on the NHPRC.

Megan Malone

*Records Analyst, State of Michigan,
Records Management Services*

Megan Malone is a Records Analyst at the State of Michigan Records Management Services, where she develops retention schedules and provides records management expertise to state and local government agencies. She earned an MLIS and a certificate in Archival Administration from Wayne State University (Detroit), and is a Certified Archivist.

AC26 | Session 22

CPR: Reviving the City of Philadelphia Department of Planning and Development Archives

Target: Tribal, State, Local

Focus: Archives, Records Management

Levels: Beginner, Intermediate

GARA: *forthcoming...*

Overview

In March 2024, the City of Philadelphia hired an archivist for its Department of Planning and Development after more than 50 years without dedicated archival oversight. Facing nearly 1,800 cubic feet of unmanaged working material, the new archivist had to quickly stabilize the archive, create policy, manage risk, and build institutional support—all while navigating shifting leadership priorities and intense public scrutiny through research and Right to Know requests.

From physical hazards and locked file cabinets to inconsistent recordkeeping practices and limited supplies, this case study explores what happens when the fundamentals of records management are neglected—and how to rebuild from the ground up.

The session will highlight the planning process, priority setting, internal outreach, risk management practices (including PPE considerations), succession planning, and creative supply solutions that helped stabilize and modernize the archive. It will also discuss strategies for managing up, communicating your value, and integrating historic materials into modern workflows.

Participants Will Gain

- Practical steps to stabilize and organize a new or neglected government archive
- Low-cost (or free) collection improvement strategies while awaiting funding
- Support and perspective for early-career archivists working independently

- Tested strategies for outreach, internal programming, and managing up
- Guidance for experienced professionals on mentoring and advising similar roles

Presenter



Rebekah Grimes

*Archivist II, City of Philadelphia –
Department of Planning and
Development*

Rebekah Grimes (she/her) has served as the dedicated archivist for the City of Philadelphia’s Department of Planning and Development for two years, focusing on integrating historic documents into modern workflows and promoting equitable access to history.

She is currently pursuing her MLIS in Archives and Curation at Drexel University and graduated from Gettysburg College in 2020 with a degree in history. She is a two-time Brian C. Pohanka Fellow and has worked with Gettysburg National Military Park, the Seminary Ridge Museum, the Museum of the American Revolution, and Musselman Library.

Outside of work, she enjoys Dungeons and Dragons, mixology, video games, and experimenting in the kitchen.

AC26 | Session 23

Addressing Invisible Decisions: Bridging the Gaps between Governance Silos in the Vermont Criminal Justice System

Target: State, Local

Focus: Records Management, Tools/Technology

Levels: Intermediate

GARA: *forthcoming...*

Overview

Criminal justice agencies depend on well-managed records to support daily operations, meet legal requirements, improve services, and maintain accountability. In practice, criminal justice records are often fragmented across state and municipal agencies (including law enforcement), created, stored, and reused across multiple agencies and systems without clear documentation of ownership, retention, access, or governance. The result can be invisible decision-making, inconsistent retention, overlapping authority, ad hoc sharing, and challenges responding to public records requests.

To encourage consistency and better understand these issues, the Vermont Division of Racial Justice Statistics (DRJS) conducted a criminal justice system gap analysis grounded in established records and information management practices. Supported by a cross-agency team, the project examines how criminal justice records and information are created, maintained, shared, and governed across Vermont's criminal

justice landscape. The work also surfaced connections beyond criminal justice, reinforcing the importance of breaking down agency boundaries for transformative information governance.

Using real-world examples, the team applied a unified RIM framework—combining generally accepted recordkeeping principles, traditional record inventories, and functional analysis—to identify where records are fragmented, duplicated, or siloed. An information governance maturity model was used to assess how governance decisions about sharing, access, and reuse are made.

This session argues that the solution is not necessarily new technology. Instead, it highlights a low-cost, practical methodology (and lessons learned) that uses existing RIM tools to deliver meaningful improvements in data sharing, quality, storage system visibility, and long-standing governance silos.

Attendees Will

- Learn how governance decisions (ownership, standards, access controls) affect record quality, reuse, and transparency
- Gain a practical framework for assessing information gaps within their own agencies
- Identify common governance challenges that limit effective sharing and coordination
- Develop shared language to collaborate more effectively with peer agencies
- Support colleagues as records, workflows, and technology change

Presenters



Laura Carter

Analyst, Division of Racial Justice Statistics, Office of Racial Equity, State of Vermont

Laura serves as an Analyst for the Division of Racial Justice Statistics (DRJS) at the State of Vermont Office of Racial Equity. She is passionate about racial and social justice and about data and information governance, with a strong interest in improving statewide processes and systems.

She previously worked as a Records and Information Management Specialist at the Vermont Department of Corrections and at the Vermont State Archives and Records Administration. Laura holds an MLIS with a concentration in Archival Studies from Simmons University and a BA in Literature with a minor in Philosophy from the University of North Carolina at Asheville. She also earned a certificate in Restorative Justice from the Vermont Law and Graduate School.



Megan Wheaton-Book

Records and Information Management Specialist IV, Agency of Human Services, State of Vermont

Meg Wheaton-Book is an experienced Records and Information Management Specialist with Vermont's Agency of Human Services, providing a wide

range of records and information services across agency systems and operations. Meg joined NAGARA in 2015 and has been an enthusiastic supporter ever since, serving as Secretary of the Board of Directors from 2022 to 2026.



Andrew Rais

Records and Information Management Specialist III, Vermont State Archives and Records Administration, State of Vermont

Andrew Rais is a Records and Information Management Specialist with the Vermont State Archives and Records Administration (VSARA). He received his BA in history from Framingham State University and his MLIS from Simmons College.

In his current role, Andrew works with the Vermont Judiciary and Executive Branch agencies to establish and implement tailored solutions for recordkeeping and information governance needs. He also supports routine VSARA operations, including processing archival records and assisting with reference services.

Thinking Inside The Box: Enhancing Training And Outreach Within Your Organization

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Records Management

Levels: Beginner, Intermediate, Advanced

GARA: *forthcoming...*

Overview

This session focuses on practical strategies and proven examples for enhancing training and outreach within your organization. Learn new ways to market your program to strengthen compliance and build buy-in from management and staff, along with ideas for creating engaging education beyond once-a-year required trainings.

Attendees will receive guidance on effectively promoting their records program to increase awareness, improve compliance, and strengthen their voice within the organization. Practical examples of marketing strategy and communication concepts will help you expand impact across all levels, while providing concrete suggestions for improving awareness and compliance through creative (and realistic) training approaches.

This Session Will

- Help you promote your program with the people most impacted by records management and increase your influence
- Illustrate why strong marketing and training matter for effective records management programs
- Share proven strategies for increasing awareness of your records program

- Provide examples of successful training and marketing campaigns (government and private sector)
- Demonstrate how to improve training and outreach using current resources (from a government perspective)
- Invite participant questions and idea-sharing during the session

Presenters



Deborah Robbins

Information Management, Manager, RSI Entech (Contractor to DOE Legacy Management)

Deborah has over twenty years of experience in records and information governance across city, county, and federal government, legal, finance, education, and private sectors. She has served in ARMA leadership roles, leads a CRA/CRM study group, and instructs for Feith's Records Management University. Deborah speaks on topics including data mapping, improving RIM compliance, change management, professional development, and business continuity and disaster recovery.



Tina Spielmann

Records Program and Policy Manager, RSI Entech (Contractor to DOE Legacy Management)

Tina Spielmann is a records management professional focused on records education and outreach. She

currently supports the Department of Energy, Legacy Management as a contractor under RSI Entech. Outside of work, she enjoys daydreaming, reading, and cuddling with her two cats.

AC26 | Session 25

The Digital First Impression Revisited: New Research on Trust, AI, and Accessibility in Local Government

Target: Local

Focus: Technology/Tools, Public Access, Accessibility, Trust and Transparency

Levels: Beginner, Intermediate

GARA: *forthcoming...*

Overview

Last year, we explored a powerful idea: a local government's website is more than a service portal (it's a signal of leadership quality). This year, we return with updated national research and sharper insights that further clarify the connection between digital experience, transparency, and resident trust.

Join Brenden Elwood (Vice President of Market Research at CivicPlus) as he shares findings from CivicPlus' 2025 national survey of more than 34,000 U.S. residents (part of an ongoing research initiative launched in 2022 to better understand what most influences trust and satisfaction in local government).

Key Findings and Discussion Points

- 62% of U.S. residents think the quality of their local government's website reflects the quality of the leadership
- 70% of residents say website accessibility compliance is highly important, and about 68% say it should be a high priority
- More than half of residents say their top concerns with AI focus on personal financial and health information being compromised (48% support usage outright if it is secure, and 28% are on the fence)
- 94% either support more or the same investments in resident technology as in previous years (only 6% say their community should spend less)
- 79% support investing tax dollars to increase efficiencies in getting information out to the public
- Top investment priorities include mass notification services, easy-to-navigate websites, web and mobile accessibility (universal accessibility), and online notifications and alerts (proactive communication channels)
- Digital self-service tools, transparent communication channels, accessible public records, and inclusive online experiences are not just operational conveniences (they shape how residents interpret leadership effectiveness, accountability, and responsible stewardship of taxpayer dollars)

In this updated session, Brenden will also share new analysis on public sentiment toward AI in local government, evolving expectations around digital accessibility, and the increasingly important role public records professionals play in reinforcing transparency (along with strategic considerations to accelerate trust-building among six key segments of the resident population).

Digital transformation isn't simply about modernization (it's about sustaining public trust).

Attendee Takeaways

- **Hear the latest national research from CivicPlus:** Gain updated insight from the 2025 resident survey and understand how digital engagement correlates with trust
- **Quantify the link between digital engagement and trust:** Learn why residents who frequently use their local government website exhibit higher levels of trust (and how to increase meaningful engagement)
- **Understand resident expectations around transparency and records access:** Explore why many residents consider access to administrative decisions and public records essential to building trust
- **Navigate public sentiment around AI:** Understand how residents view AI use in local government and how to communicate emerging technology initiatives transparently and responsibly
- **Strengthen the case for mobile, accessibility, and self-service investment:** Use clear data points (including support for mobile reporting tools) to justify continued investment in inclusive, accessible digital experiences

Presenter



Brenden Elwood

*Vice President of Market Research,
CivicPlus*

*CivicPlus® Vice President of Market
Research Brenden Elwood is
passionate about resident
engagement, community betterment,
and knowledge gained through*

research and conversation. With over 14 years of experience as an elected official and in professional research, Brenden helps CivicPlus continue to scale and deliver best-in-class solutions. Brenden leads the CivicPlus Market Research arm and develops research programs to better understand how CivicPlus solutions positively impact resident experiences in the communities they serve (and how those solutions can be tailored to meet evolving needs).

THURSDAY, JULY 23
2:30 PM – 3:30 PM

CONCURRENT
SESSION BLOCK 6

AC26 | Session 26

4 Pillars to Compliance: Building Beyond the Policy Foundation

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Records Management

Levels: Beginner, Intermediate

GARA: *forthcoming...*

Overview

For those outside of RIM, navigating policy and retention schedules can be intimidating. For RIM professionals, the greater challenge often begins after the policy is written: How do you get people to actually manage their records—and how do you know they are doing it?

In this session, Jenny Alexander, Director of Records and Information Management Services at the University of Texas at Austin, shares the University's roadmap for raising the bar on compliance through a holistic, four-pillar approach: relationships, training, inventory, and monitoring.

For each pillar, attendees will hear about real-world challenges, successes, and future goals—along with actionable recommendations for implementing similar efforts within their own organizations. The session includes practical ideas for using M365 to simplify or automate administrative tasks, applying change management strategies to ease resistance, and building the relationships necessary to sustain long-term compliance.

Participants will leave with scalable ideas and a suggested implementation sequence for incrementally strengthening compliance—demonstrating that a holistic approach does not require being everywhere at once, but rather making steady progress across every opportunity.

Presenter



Jenny Alexander, MSIS, CRM

Director of Records and Information Management Services, University of Texas at Austin

Jenny Alexander has served as Director of Records and Information Management Services at The University of Texas at Austin since September 2023, supervising a talented team dedicated to keeping information organized, accessible, and legally compliant across the University.

Prior to her role in public higher education, Jenny served as Records

Management Officer for the Texas Department of State Health Services and for the Texas Health and Human Services System. Throughout her career at the city, county, and state levels, she has focused on public service, process improvement, and strengthening information practices.

Jenny holds a Master's degree in Information Studies from the University of Texas at Austin and a Bachelor's degree from Yale University. She is a Certified Records Manager.

AC26 | Session 27

Project Development for Managing Congressional Records: Processing the Richard C. Shelby Collection

Target: Federal, State, Public Institutions of Higher Learning

Focus: Archives, Records Management

Levels: Intermediate

GARA: *forthcoming...*

Overview

In 2022, The University of Alabama Libraries Special Collections received a grant to process and preserve the archives of Senator Richard C. Shelby as part of the United States Senate Preservation Partnership Grants program. Participation in the grant program provides a unique opportunity to preserve Senate history and ensure long-term access to the Senator's public service record.

This session shares an ongoing case study focused on the challenges and successes of stewarding a large congressional collection with significant research and civic value. Project planning has required new workflows to address unique formats and content, and ongoing collaboration with the Senate Historical Office has helped optimize processing, description, and preservation approaches.

Key Topics Include

- Surveying collection contents (scope, significance, formats) and adjusting plans based on research value
- Identifying and managing sensitive and restricted materials (including high volumes of PII)
- Staffing and project management (roles, communications, cohesion, efficiency)
- Reporting procedures and stakeholder communications
- Quality control for rehousing, description, accuracy, and completeness
- Born-digital and electronic records workflows (organization, description, preservation and access copies)
- Web and social media archiving challenges (embedded and dynamic content)
- Preservation and access strategies for legacy audiovisual media (specs and reformatting procedures)
- Transcription workflows to improve discoverability and searchability

A major emphasis is born-digital processing. Special Collections did not have an established born-digital program prior to receiving the Shelby collection, and project staff developed sustainable strategies through testing and evaluation of tools and approaches. Tools discussed include

FTK Imager, Autopsy, and CaseGuard (alongside format migration and reformatting workflows).

The session also highlights the benefits of building a community of practice among Senate Preservation Partnership grant recipients through ongoing check-ins and information sharing. Attendees will leave with practical takeaways for multi-year, grant-funded congressional processing projects and for strengthening born-digital capacity more broadly.

Presenters



Jessica Robertson

Head of Special Collections, The University of Alabama Libraries

Jessica Robertson serves as the Head of Special Collections at The University of Alabama Libraries. Her background is in digital special collections program development and grant management. She received her M.S.I.S. from UNC-Chapel Hill in 2018.



David Ferrara

Congressional Processing Digital Archivist, The University of Alabama Libraries

David Ferrara is the Congressional Processing Digital Archivist at the University of Alabama Libraries Special Collections, where he processes born-digital and digitized materials within the Richard C. Shelby Papers. He holds a BA and MA in history from the University of New Hampshire and a Ph.D. in history from the University of Alabama.



Tyler Hendrix

Lead Congressional Processing Archivist, The University of Alabama Libraries

Tyler Hendrix is the Lead Congressional Processing Archivist working on the Richard C. Shelby Papers at the University of Alabama (since July 2023). He earned a BA in History (2019) and an MA in History with a Public History concentration (2022) from Georgia Southern University, and will complete his MLIS from the University of Southern Mississippi in December 2026.

AC26 | Session 28

Mixing Your IG Mission and Message for the Crowd, OR How To Get Your Vocals Heard Across the Roar!

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Information Governance, Records and Information Management, Program Communication

Levels: Intermediate, Advanced

GARA: *forthcoming...*

Overview

In many organizations, the mission and messages of the information governance (or records and information management) program are not effectively communicated to staff, leaders, contractors, and other stakeholders. There are many reasons for this, including the priority (or lack thereof)

given to your program, communication skills, budget constraints, and more.

This session offers practical ideas, tools, and methods you can seek out and use within your organization to improve the odds of having your IG voices heard above the roar. It also explores how (especially in shifting regulatory and operational environments) IG and RIM messaging may need to align more directly with organizational mission and operational effectiveness, not just compliance.

Key Takeaways

1. How to find and use communications tools your organization may already have
2. How to build a broad network of IG stakeholders who help spread your program's messages
3. How to engage leaders across the enterprise and identify where you can help improve IG in their business units
4. How to help business units build supplemental IG training that reinforces and extends your program
5. How to keep program messaging fresh
6. The case for evolving your program as the enterprise changes

Presenter



Tod Chernikoff, CRM, IGP, CIP

ETS Analyst V, Navy Federal Credit Union

Tod Chernikoff is a Certified Records Manager, an Information Governance Professional, and a Certified Information Professional. He has over thirty years of experience providing records and information management

and information governance services to organizations and clients. He has served ARMA International in positions at the local, regional, and international levels, including as a member of the ARMA International Board of Directors. Tod received the ICRM's 2014 Alan Andolsen Award in recognition of outstanding CRM Mentorship. He is a member of the Enterprise Data Risk Governance Team at Navy Federal Credit Union, where he helps enable RIM Governance efforts across the global enterprise..

AC26 | Session 29

How Does Your Agency Compare? Benchmarking AI Readiness in RIM

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Technology/Tools

Levels: Beginner, Intermediate

GARA: *forthcoming...*

Overview

Drawing from the *AIIM 2025 Industry Watch: State of Intelligent Information Management Technology* report, this session explores what separates AI-ready organizations from those still struggling with adoption.

Organizations that feel “very prepared” for AI share clear characteristics: 66% have established AI governance policies, 65% have formal data quality processes, and they demonstrate significantly stronger performance across core information management capabilities. The research shows that combining

governance frameworks with strong data quality processes can increase AI adoption rates by 20–50% across use cases.

For government records managers, this confirms that expertise in lifecycle management, metadata standards, and systematic governance is foundational to AI readiness. This session will help you assess your agency's current position, understand which capabilities matter most, and reposition traditional RIM as a strategic advantage in the age of AI.

Attendees Will

- Benchmark their agency against 288 organizations to identify AI readiness gaps and maturity level
- Reframe their value proposition using data that demonstrates RIM as foundational to AI success
- Prioritize investments strategically by understanding which capabilities most impact AI adoption
- Create an actionable roadmap to move from compliance-focused to innovation-enabling information management

Presenter



Tori Miller Liu , MBA, FASAE, CAE, CIP

President & CEO, Association for Intelligent Information Management

Tori Miller Liu is President & CEO of the Association for Intelligent Information Management (AIIM). Previously, she served as Chief Information Officer of the American Speech-Language-Hearing Association (ASHA) and has worked in association management since 2006.

A frequent international speaker, Tori

has presented at AIIM events worldwide, the NAGARA Annual Conference, ARMA Canada, 930Gov, RIMPA Live, and numerous association and digital strategy events across four continents.

She is a Certified Association Executive and Certified Information Professional, holds an MBA from George Washington University, and was named a Fellow of the American Society of Association Executives (ASAE) in 2023. She received the Association Women Technology Champions Technology Leadership Award in 2024.

AC26 | Session 30

Diversity, Equity, Inclusion, and Accessibility in Archives and Records Programs

Target: Federal, State, Local

Focus: Archives, Records Management

Levels: Beginner, Intermediate, Advanced

GARA: *forthcoming...*

Overview

Join this session for an energizing look at the practical impact of Diversity, Equity, Inclusion, and Accessibility (DEIA) in archives and records management. Learn how SourceAmerica leverages the AbilityOne Program to support inclusive employment pathways for individuals with disabilities while strengthening records operations and services.

Key Topics

1. Navigating new federal directives while prioritizing inclusivity
2. Automated and secure records processes that also promote accessibility
3. Skills development resources and best practices supporting disability inclusion in records roles
4. Why DEIA strengthens culture, service delivery, and community engagement
5. How the AbilityOne Program creates meaningful job opportunities for individuals with significant disabilities
6. Partnership success stories connecting skilled talent to records management work

Specific Objectives

- Increase awareness and understanding of DEIA in records programs
- Support networking and collaboration among professionals advancing DEIA initiatives

What You'll Leave With

- Straightforward, actionable strategies to enhance DEIA in your organization
- Resources and examples you can apply directly to your work
- Connections with SourceAmerica and subject matter experts focused on inclusion
- Practical ways to strengthen your leadership through inclusive practices aligned with emerging standards

Join us in shaping a future where diversity is celebrated and integrated into every facet of records management.

Presenter



Patsy Ross

Subject Matter Expert, Records Management, SourceAmerica

**THURSDAY, JULY 23
3:45 PM – 4:45 PM**

**CONCURRENT
SESSION BLOCK 7**

AC26 | Session 31

The Value of a Records Management Program Health Check: Using Audit to Diagnose Gaps and Propose Solutions for Your RM/IG Program

Target: Federal, State, Local, Public Institutions of Higher Learning

Focus: Archives, Records Management, Technology/Tools

Levels: Beginner, Intermediate, Advanced

GARA: *forthcoming...*

Overview

Many organizations treat Audit as the enemy. This session flips that mindset: Audit can be your strongest ally and a powerful supporter of the Records Management (RM) and Information Governance (IG) function.

Using a “program health check” approach, you’ll learn how to evaluate your RM/IG program across the organization and diagnose where you fall on a spectrum from “critical condition” to “perfect health.” The session also examines end-user perception (because perception becomes reality) and how to move a negative perception toward buy-in and shared ownership.

You'll leave with practical checklists you can apply immediately to assess gaps, prioritize improvements, and use a teamwork approach to help your program excel.

Presenter



Raymond C. Davis

Senior Principal Consultant (RIM)

Ray Davis is a leader in the Records Management (RM) and Information Governance (IG) profession with over 30 years of experience.

Ray's impact began at Commerce Bank, headquartered in Cherry Hill, NJ. Joining in 1989, Ray built their RIM/IG program from the ground up. The initiative evolved from a modest in-house program supporting 28 locations across four states into a sophisticated, fully outsourced operation servicing 1,200 locations from Maine to Florida by 2009.

Currently, Ray serves as a Senior Principal Consultant at The FX Organization in Palmyra, NJ. In this role, he partners with organizations to modernize and optimize their Records Management programs. He is also a dedicated educator, frequently creating, producing, and broadcasting professional RM/IG webinars for the global community.

AC26 | Session 32

Using Bitmoji to Create Knowledgeable, Engaging, and Unforgettable Trainings

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Technology/Tools

Levels: Beginner

GARA: *forthcoming...*

Overview

If people remember far more of what they see than what they hear, why are so many employee trainings still limited to bullet-point slides? Research shows that higher-quality training increases productivity, profitability, engagement, and retention of material.

This session demonstrates how to transform traditional records management training into something knowledgeable, engaging, and unforgettable using the free Bitmoji app. Learn how to create a customized avatar, locate images that reinforce learning objectives, and integrate them into presentations that bring otherwise routine material to life.

Attendees will leave with practical guidance for designing visually engaging sessions, structuring content for clarity and retention, and rethinking how records training can inspire participation rather than resistance.

Presenter



Alexandra Cardaropoli

Records Analyst, City of Carrollton, TX

Ali Cardaropoli serves as the Records Analyst for the City of Carrollton, Texas. Since joining the City in 2015, she has spent the past decade

strengthening and expanding the organization's Records Management program, with a strong focus on developing clear and engaging training for staff across all departments.

Ali is an active member of ARMA International and currently serves as Co-VP of Membership for the ARMA Dallas Chapter. She joined NAGARA in 2025 and is pursuing her GARA Certificate, along with ICRM accreditation as both a Certified Records Analyst and Certified Records Manager.

Ali holds a Bachelor of Arts in English from Oklahoma City University, graduating with high honors. Outside of work, she is writing her first young adult novel and enjoys relaxing with her dog and a good book.

AC26 | Session 33

Practice Makes Prepared: Open Records Request Drills

Target: Federal, Tribal, State, Local

Focus: Records Management

Levels: Beginner, Intermediate

GARA: *forthcoming...*

Overview

When you are new to an organization (or new to open records work), the first major request can feel overwhelming. You may be asking: Who owns the record? Where is it stored? What

information does it contain? That stress increases when record creators and subject matter experts are unfamiliar with the requirements of open records requests.

This session shares how South Platte Renew (Colorado's third-largest wastewater facility) used open records request drills to prepare for the real thing and close knowledge gaps along the way. Through practice scenarios, the organization identified challenges, uncovered opportunities for improvement, and strengthened understanding of records responsibilities across staff roles.

Attendees will learn how to run their own open records request drills, use the results to map the records landscape, and increase engagement and confidence across record creators and records professionals (leading to faster, more accurate responses when the real request arrives).

Presenter



Roxanne Ward

*Records and Information Specialist,
South Platte Renew*

***Roxanne Ward** graduated from the University of North Texas in 2021 with a Masters in Library and Information Science. She spent two years as a Records Analyst for Harris County before moving to Colorado to manage the Records and Information Program at South Platte Renew, Colorado's third largest wastewater facility. Roxanne is currently President-Elect for the ARMA Mile High Denver Chapter and is working towards her CRM.*

AC26 | Session 34

From Retention Schedule to Information Map: Transforming Complexity into Clarity

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Records Management, Technology/Tools

Levels: Intermediate, Advanced

GARA: *forthcoming...*

Overview

Information is no longer confined to file rooms or a handful of on-premises repositories. Today, content is dispersed across cloud platforms, collaboration tools, line-of-business systems, mobile devices, AI environments, messaging systems, and social media. This fragmentation makes it difficult for RIM professionals to apply retention rules consistently and confidently.

This session introduces a practical, modern approach to translating traditional retention schedules into dynamic information maps—visual, functional tools that reveal where information lives, who owns it, and how it should be governed. Through real-world examples and actionable techniques, presenters will demonstrate how information mapping brings clarity to complex ecosystems.

Topics Covered

- Identifying and categorizing information assets across diverse systems
- Connecting retention rules to real data locations and business processes
- Building maps that support compliance, risk reduction, and operational efficiency

- Strengthening collaboration between RIM, IT, Legal, Privacy, and business units
- Preparing for emerging technologies and evolving data governance expectations

Attendees Will

- Understand why traditional retention schedules fall short in distributed environments—and how mapping fills the gap
- Gain step-by-step methods for aligning retention rules with real-world systems and ownership
- Learn how information maps create a shared language across governance stakeholders
- Leave with clear next steps for transforming retention schedules into actionable information maps

Presenters



Kiji Burston

Director of Information Governance and Operations, Cadence Group

Mr. Burston brings more than 25 years of leadership and hands-on expertise in Records and Information Governance, advising federal agencies, global corporations, law firms, and state and local governments. His work spans technology enablement, retention strategy, risk mitigation, organizational assessment, and large-scale transformation initiatives. He holds an MBA and is a certified Information Governance Professional.



Tina Teree Baker, IGP

President, Cadence Group

Tina Teree Baker has led Cadence Group since 1988 and brings over 25 years of experience designing and operationalizing adaptable information governance programs for federal agencies and global corporations. A certified Information Governance Professional with a master's designation in Electronic Records Management, she is a frequent national speaker on sustainable compliance, defensible destruction, and information mapping.

AC26 | Session 35

From Chaos to Confidence: How Strong Repositories & Retention Schedules Enable AI Readiness and Cyber Resilience

Target: Federal, Tribal, State, Local, Public Institutions of Higher Learning

Focus: Archives, Records Management

Levels: Intermediate

GARA: *forthcoming...*

Overview

Important Note: This session is designed purely as thought leadership and educational guidance. It is not a vendor sales presentation, product demonstration, or promotional opportunity. The focus is on sharing best practices,

frameworks, and insights relevant to NAGARA's public-sector community.

Public-sector organizations are under increasing pressure to modernize systems, prepare for AI-driven capabilities, and safeguard sensitive information (all while managing decades of records stored across legacy systems, file shares, and cloud platforms). For government agencies, real progress doesn't begin with new tools (it begins with understanding, organizing, and governing the information you already have).

This session examines how a well-managed repository (supported by clear, current, and defensible retention schedules) forms the foundation for both responsible AI adoption and stronger cyber resilience. Attendees will gain practical insight into how data sprawl, outdated schedules, and ungoverned ROT (redundant, outdated, trivial content) complicate modernization efforts, trigger compliance risk, burden staff, and widen the impact of cyber incidents.

Designed for archivists, records managers, IT leaders, and government administrators, this session provides a roadmap for improving data hygiene and strengthening the governance layer needed to advance digital transformation, respond to public records obligations, and prepare for AI in today's public sector environment.

Key Takeaways

- How foundational governance accelerates modernization and AI readiness (and why accurate, well-classified, and accessible records are essential for trustworthy AI, automation, and efficient public services)
- How modern retention schedules reduce exposure and support compliance (including how updating and simplifying schedules can reduce sensitive data holdings, minimize breach impact, and improve

responsiveness to public records, legal, and regulatory requirements)

This session helps attendees understand how strong records management and updated retention practices support cybersecurity, AI readiness, and overall information resilience. It's designed for professionals exploring how data quality, governance, and repository health influence an agency's ability to protect information and modernize responsibly.

Presenter



Kurt Thies

Senior Director, Morae

Kurt is an entrepreneur, writer, and speaker with over 30 years of experience as a strategic advisor and expert in information lifecycle management. He previously founded Accutrac Software Inc. (a records management software solution used by leading law firms, government agencies, and Fortune 1000 corporations). He currently serves as a Senior Director at Morae, bringing a consultative approach and strategic leadership to drive growth and deliver customer-centered solutions.