

Getting to the Finish Line on Electronic Records



Wednesday, March 29, 2023, 8:30 a.m. - 3:30 p.m.

Clifford Chance, 2001 K St, NW, 9th Floor,
Washington, D.C., 20006

Jointly presented by the Northern Virginia, Greater Washington, and Metropolitan Maryland chapters of ARMA

Our first in-person joint chapter seminar since 2019! This seminar will explore the next steps in your electronic records management, whether you are engaging with complex digitization projects, large-scale management challenges, automation, or figuring out how to apply the latest NARA guidance from the presidential records directive. We will include a panel discussion on FADGI and a case study of an auto-declassification solution from a local vendor. Attendees will also get the chance to interact with vendors active in the electronic records and data management space. We will finish with a special presentation from the White House records director on how he is dealing with his challenges of managing paper and electronic presidential records.

8:30-9:00 **Registration/Continental Breakfast**

9:30-10:30 **Panel Discussion: Getting to End on Digitization**

More on FADGI

This panel discussion centers on the following aspects of the digitization process: implementation and execution of policy to support digital transformation and information governance; quality control resources and techniques to ensure information is digitized accurately; production procedures for efficient conversion; and proper output to records management systems for archiving and search.

10:00-10:45 Sponsor Talk – BMS CAT

10:45-11:45 **Case Study: Auto-Declassification**

Electronic Automatic Declassification Review (eADR)

Dan Beard will provide an overview of QualX Corporation's eADR solution to support the OMB NARA M-19-21 and OMB NARA M-23-07 Memoranda requiring Federal Agencies to create, retain, and manage Federal records in electronic format. Governing the Automatic Declassification Review (ADR) Program, Presidential Executive Order 13526 states, "All classified records shall be automatically declassified on December 31 of the year that is 25 years from the date of origin..." Federal Agencies with classified records are required to review classified permanent records prior to transfer to NARA Archives to determine if each record can be declassified, or if the record must remain classified. Supportive of the requirements of the OMB and NARA memorandums, QualX has developed a process for conducting automatic declassification reviews in an electronic environment. Mr. Beard will provide a review of the requirements, the solution, and the benefits of the eADR module.

11:45-12:00 Sponsor Talk - National Office Systems (NOS)

12:00-12:45 **Lunch**

12:45-12:50 Sponsor Talk – Iron Mountain

12:50-1:30 **M-19-21 Update**

A presentation on OMB/NARA memo M-19-21, Transition to Electronic Records. There will be a discussion on how agencies have responded to the transition, particularly relating to digitization, strategic planning, and transferring records practices and guidelines. The session will also include additional guidance from NARA, including the M-19-21 exceptions process, since the last time we tracked this topic was in November 2022.

1:30-1:45 Sponsor Talk - Feith

1:45-2:00 **Break**

2:00-2:15 Sponsor Talk - Zimmerman Associates, Inc. (ZAI)

2:15-3:00 **Unique Challenges of Managing White House Records**

This session will focus on the unique responsibility of managing presidential records: Obligations under the Presidential Records Act, technological challenges of both paper and electronic records, adapting records management practices to each new administration, and dealing with the upheaval of a Presidential transition.

3:00-3:15 **Conclusion/Wrap-up:** Chapter Presidents

3:30-4:30 Post-Spring Seminar Mixer

Speakers



DAN BEARD, CRM

QualX

Dan is currently serving as President of the ARMA-NOVA chapter and has over 19 years of experience as a trusted information governance senior leader, recognized for building strategic partnerships with national and global clients and stakeholders for federal, commercial, and non-profit organizations. Mr. Beard is passionate about streamlining complex systems, processes, and content management to improve business operations and protect clients' sensitive information and intellectual property. Mr. Beard is a Program Manager and Technical Subject Matter Expert (SME) in Records and Information Management (RIM) and the development and implementation of RIM solutions for Federal Agencies. He holds a Master of Business Administration, and Finance from Drake University and a Bachelor of Arts degree in Economics and International Business from the State University of New York at Buffalo.



CHRIS BEASLEY

President & CEO, Edge Digital Group

Chris has nearly 30 years of experience in information governance, records management, information technology, and digital transformation. Through strategic partnerships, Chris has built a best-of-breed solution stack to meet federal government challenges like M-23-07. He has firsthand experience helping organizations cross the digital divide.

PHILIP DROEGE

Director of Records Management, The White House



Philip currently serves as the Director of the White House Office of Records Management. He grew up in the Maryland suburbs of Washington, DC, and graduated from Concordia College in Seward, Nebraska, in 1989. Philip started his professional life as a high school teacher on Long Island, New York. In July of 1990, he moved back to Washington, DC, to take a job in the White House as a Records Technician. During his 32 years in the Office of Records Management, he has served in six Presidential Administrations as a Records Analyst, Supervisor, and Deputy Director and his current position as Director, which he has held since 2004.

LISA HARALAMPUS

Director, Records Management Policy and Outreach, National Archives and Records Administration



Lisa has nearly 30 years of experience in federal government records and information programs working at NARA and the U.S. Department of State. She has experience developing and implementing enterprise-wide information management policies and training and with developing and operating multi-million-dollar IT systems to maintain and provide access to electronic archives. In her current role, she develops and issues government-wide records management policies and guidance for federal agencies related to records management standards, technology, and processes. Lisa leads NARA's Federal Electronic Records Management Initiative (FERMI).



SUSHEEL JOHN

Vice President of Strategy and Products, ibmi

Susheel has nearly 25 years of global experience in intelligent document processing solution industry. Susheel has worked with a diverse client base spread across multiple countries globally and built strong businesses in his career. His diverse experiences have helped build an immense wealth of knowledge in solving customer problems relative to information capture.



DON WILLIAMS

Founder, Image Science Associates

Don's early 25 yr. career was spent as a research imaging scientist at Eastman Kodak, where he was exposed to a broad category of digital and analog imaging modalities. Since 2007 then, he has worked with the world's largest library to help create and modify the FADGI still imaging guidelines and the supporting reference targets and software to support that effort. He is a participating member of ISO TC42/WG18 for digital capture performance metrics and was the editor for ISO 12233 for camera and scanner resolution measurement. He frequently teaches and consults on image quality performance and methods to accomplish accurate and consistent digital imaging outcomes and works with industry and other non-federal organizations on the structure and implementation of the CUI program and its impact on the protection of sensitive information within these entities.