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 MAIG, NARA

 BRIDG MEETING, OCTOBER 20, 2020

 SPEAKER: SO BEFORE WE GET TO THE AGENDA, I HAVE

 A FEW QUICK ANNOUNCEMENTS THAT I WANT TO SHARE

 WITH ALL OF YOU. FIRST, STAYING ON THE COVID

 THEME, THIS MORNING WE POSTED AN UPDATE TO OUR

 COVID AND RM FAQ'S THAT WE INITIALLY POSTED IN

 APRIL. WE MADE RECENT CHANGES TO IT TO NOTE THAT

 WE'RE LOOKING AT THE GRS TO LOOK AT THE RECORDS

 THAT ARE NOW BEING CREATED. MINOR CHANGES TO THE

 LANGUAGE IN THERE. SO I ENCOURAGE YOU TO TAKE A

 LOOK AT IT. IF YOU HAVE ANY QUESTIONS ABOUT THE

 DETAILS OF WHAT IS IN THE COMMUNICATION, PLEASE

 GET IN TOUCH WITH THE GRS TEAM. SECOND, ALSO

 RELATED TO COVID, I WANTED TO GIVE YOU A HEADS UP

 ON THE COMMUNICATION THAT WE ARE GOING TO BE

 SENDING OUT TOMORROW. WE HAVE BEEN GETTING

 QUESTIONS FROM SOME AGENCIES ASKING US TO DO

 ON-SITE APPRAISAL WORK. AND AT THIS POINT, WITH

 NARA AND MOST AGENCIES IN THE EARLY STAGES OF

 RE-OPENING, WE ARE NOT SCHEDULING ANY IN-PERSON

 AGENCY VISITS. SO OUR FOCUS RIGHT NOW IS ON

 DOING THIS WORK SAFELY, USING THE TOOLS AT OUR

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 DISPOSAL TO CONDUCT THE WORK VIRTUALLY. IN

 TOMORROW'S COMMUNICATION, YOU WILL FIND FURTHER

 DETAILS ON OUR APPROACH AND WE ALSO ARE INCLUDING

 SOME TIPS ON HOW YOU CAN PREPARE FOR VIRTUAL

 MEETINGS FOR APPRAISAL AND AS WE CONTINUE TO WORK

 THROUGH THIS TOGETHER. SO IF YOU HAVE ANY

 QUESTIONS ABOUT THAT COMMUNICATION, I ENCOURAGE

 YOU TO GET IN TOUCH WITH YOUR APPRAISAL ARCHIVIST

 AND WE WILL BE HAPPY TO DISCUSS WHERE WE ARE.

 FINALLY, JUST A QUICK UPDATE WITH REPORTING NEWS,

 AS I'M SURE YOU ARE AWARE AT THE END OF THE MONTH

 WE POSTED OUR RECORDS MANAGEMENT REPORT. I THANK

 ALL OF YOU FOR COLLECTING THE DATA AND SENDING IN

 YOUR REPORTS IN ON TIME AT REALLY A TIME THAT I

 WAS I'M SURE INCONVENIENT FOR ALL OF US. SO

 THANK YOU FOR DOING THAT AND GETTING US THE DATA.

 AS YOU KNOW, AND I'M SURE'S IT IS THE SAME IN

 YOUR AGENCY AS WELL, THE WORK CONTINUES. SO

 RIGHT NOW WE'RE ALREADY WORKING ON THE TEMPLATES

 AND THE QUESTIONS THAT WE WILL USE FOR THE

 REPORTING PERIOD NEXT YEAR. AT THIS POINT, WE

 EXPECT THE REPORTING WINDOW TO RUN FROM

 JANUARY THROUGH MARCH AND WE WILL TALK A LOT MORE

 ABOUT THAT AND THE PLANS FOR REPORTING AT OUR

 NEXT BRIDG MEETING IN DECEMBER. SO IF YOU HAVE

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 ANY QUESTIONS ON ANY OF THIS, PLEASE SEND THEM IN

 AT ANY TIME IN THE CHAT. AND WE WILL DISCUSS IN

 THE GENERAL Q AND A AT THE END OF THE MEETING.

 SPEAKER: SO LET'S KEEP THINGS MOVING AND TAKE A

 LOOK AT THE AGENDA, IF WE COULD FLIP THE SLIDE.

 SO WE HAVE A REALLY GOOD PROGRAM AND YOU CAN SEE

 FROM THE AGENDA WE HAVE QUITE A BIT TO COVER. SO

 WE CAN GO BACK ONE SLIDE. SO I JUST WANT TO DO A

 QUICK RUN THROUGH. FIRST WE HAVE GORDON AND JEFF

 WHO WILL TALK ABOUT WHAT IS GOING ON WITH THE

 FRCP. THEN I WILL BE BACK TO TALK ABOUT TWO

 BULLETINS AND THEN TURN IT OVER TO LISA TO TALK

 ABOUT TRANSITION, WHICH IS A BIG TOPIC RIGHT NOW.

 AND THEN WE WILL CLOSE THE MEETING WITH A

 PRESENTATION ON OUR COGNITIVE TECHNOLOGIES WHITE

 PAPER WHICH WE POSTED YESTERDAY. SO IT IS VERY

 TIMELY. WE WILL HAVE A CHANCE TO GIVE YOU AN

 OVERVIEW OF CONTENT OF THAT WHITE PAPER.

 HOPEFULLY AFTER THAT WE WILL HAVE TIME FOR

 GENERAL Q AND A AND WE CAN HANDLE ANY CHAT

 QUESTIONS THAT COME IN. SO WITH THAT, I WILL

 TURN IT BACK OVER.

 SPEAKER: THANK YOU, LAWRENCE. THIS IS REMINDER

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 TO OUR VIEWERS THAT IF YOU ARE NOT ABLE TO ASK

 YOUR QUESTION IN AN INDIVIDUAL Q AND A SESSION WE

 WILL HAVE A CLOSEOUT Q AND A SESSION WITH ALL OF

 THE PRESENTERS FROM TODAY'S PROGRAM. NOW PLEASE

 WELCOME GORDON AND JEFFERSON WHO WILL PROVIDE AN

 UPDATE ON THE FRCP PROGRAM

 SPEAKER: THANK YOU. GOOD MORNING. I'M GORDON,

 DIRECTOR OF THE CUSTOMER RELATIONSHIP MANAGEMENT

 FOR THE FEDERAL RECORDS CENTER PROGRAM. AND I

 HOPE EVERYONE IS DOING WELL AND STAYING SAFE IN

 OUR CURRENT ENVIRONMENT. BUT AS WE CONTINUE TO

 GRADUALLY AND SAFELY OPEN THE 18 FEDERAL RECORD

 CENTERS AROUND THE COUNTRY, YOU ARE ABLE TO GET

 SOME REAL TIME INFORMATION IF YOU WERE TO GO TO

 FRC.GOV AND YOU CLICK ON OPERATING STATUS, AND IT

 ADVISES ALL OF OUR AGENCY CUSTOMERS WHAT PHASE

 EACH OF THE RECORDS CENTERS ARE IN. AS OF THIS

 MORNING, WE HAVE NINE -- EIGHT, I'M SORRY,

 CENTERS IN PHASE 1, 9 IN PHASE 2 AND 1 CENTER IS

 CURRENTLY CLOSED DUE TO THE COVID METRICS IN THAT

 COUNTY IN ILLINOIS. SO PLEASE KEEP IN MIND THAT

 10 TO 20 PERCENT OF OUR STAFF ARE WORKING DURING

 LIMITED HOURS IN PHASE ONE. AND 25 TO 50 PERCENT

 OF THE STAFF ARE IN THOSE BUILDINGS DURING PHASE

 5

 TWO. SO, ALSO, CUSTOMERS, BEFORE YOU SEND ANY

 RECORDS TO ANY OF THOSE CENTERS, PLEASE MAKE SURE

 YOU COMMUNICATE WITH THAT RECORD CENTER TO SEE IF

 THEY ARE ABLE TO ACCEPT RECORDS AND WHAT AMOUNT

 OF RECORDS THEY ARE ABLE TO ACCEPT SAFELY. I

 KNOW WE HAVE MANY IN THE RECORDS MANAGEMENT

 COMMUNITY ON THE LINE TODAY. BUT FOR OUR FEDERAL

 RECORDS OFFICERS, IN A RECENT LETTER FROM OUR

 ACTING DIRECTOR OF THE FEDERAL RECORDS CENTER

 PROGRAMS, STEPHANIE, YOU RECEIVED A LETTER FROM

 HER WITH YOUR INNER AGENCY AGREEMENTS FOR 2021.

 AND YOU NOTED IN THAT LETTER IS WHERE WE'RE

 ESTABLISHING A NEW RATE STRUCTURE AND BILLING

 TIMING TO ENSURE THE FEDERAL RECORDS CENTER

 PROGRAM RECOVERS ALL COSTS AS REQUIRED BY LAW.

 SO THIS MORNING WITH ME IS JEFF WHO IS THE

 FINANCIAL ANALYST FROM THE FEDERAL RECORDS CENTER

 PROGRAM WHO WILL SPEAK MORE ABOUT THIS. JEFF.

 SPEAKER: THANK YOU, GORDON. GOOD MORNING TO

 EVERYBODY ON THE PHONE. AS GORDON MENTIONED IN

 LATE SEPTEMBER THE INNER AGENCY AGREEMENTS WERE

 DISTRIBUTED TO EACH OF YOU. IT DOES REVEAL AND

 DOES INCLUDE NEWS ABOUT THE NEW FEE STRUCTURE FOR

 THE RECORDS CENTER PROGRAM. IT IS A MAJOR

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 REORGANIZATION OF OUR FEES. AND WE BELIEVE IT

 WILL SIMPLIFY AND EXPEDITE THE INNER AGENCY

 AGREEMENT PROCESS AS WELL AS BILLING. SO UNDER

 THE NEW STRUCTURE, THE FEES FOR MOST STANDARD

 SERVICES, INCLUDING TRANSFERS, MOST TYPES OF

 DISPOSITIONS, REFERENCE AND RECALLS ARE INCLUDED

 AS BASELINE SERVICES WITHIN THE STORAGE FEE.

 SAID ANOTHER WAY, THERE WILL NOT BE A SEPARATE

 CHARGE FOR REFERENCE, RECALLS, TRANSFERS AND MOST

 DISPOSITION. THE FEES THAT WILL REMAIN IN EFFECT

 AND BILLED SEPARATELY FROM STORAGE INCLUDE BUT

 ARE NOT LIMITED TO TRUCK SERVICE, LABOR RATES,

 PERMIT WITHDRAWALS, AND SPECIAL PROJECTS LIKE

 SCANNING AND SOME CONSULTING WORK. SO THE FEE

 STRUCTURE IS IN EFFECT BEGINNING OCTOBER 1ST.

 AND YOU SHOULD HAVE A COPY OF THOSE 2021 RATES

 THAT WERE ATTACHED TO YOUR INNER AGENCY

 AGREEMENT. WE DO WANT TO POINT OUT AND HIGHLIGHT

 THERE IS NOT A SEPARATE FEE BEING CHARGED FOR THE

 DISPOSAL OF RECORDS. AND WE HOPE THAT THAT WILL

 ENCOURAGE THE TIMELY DISPOSITION OF ELIGIBLE

 RECORDS, WHICH WILL ELEVATE THE ENTIRE RECORDS

 MANAGEMENT, RECORDS LIFE CYCLE PROCESS. I'VE

 GOTTEN A FEW QUESTIONS AND I DID WANT TO COVER

 THEM TODAY, SORT OF THE LEGAL FRAMEWORK UNDER

 7

 WHICH WE CAN MAKE THESE CHANGES. AND I WANT TO

 DRAW YOUR ATTENTION TO THE ENABLING LEGISLATION

 FOR THE RECORDS CENTER PROGRAM FOR THE REVOLVING

 FUND. IT WAS INCLUDED IN PUBLIC LAW 106-58 THAT

 WAS PASSED SEPTEMBER 29, 1999. THAT LAW ACTUALLY

 IS THE OMNIBUS APPROPRIATION. BUT IT INCLUDED A

 LITTLE SECTION THAT ESTABLISHED THE FUND AND IT

 IS CODIFIED IN 44 USC SECTION 2901. BUT IN

 PARAGRAPH, LET ME LOOK IT UP, IN PARAGRAPH C,

 THERE IS A SECTION ABOUT USER CHARGES. AND IT

 ACTUALLY WAS SORT OF -- ITS FOUNDATIONAL

 LEGISLATION FOR US, AND IT WAS REALLY WRITTEN IN

 A VERY COHERENT, COGNIZANT WAY IN TERMS OF HOW WE

 WOULD COME TO DELIVER THINGS IN A REIMBURSABLE

 BASIS TO EACH OF YOU. SO THE LEGISLATION

 INDICATES THAT WE AS A PROGRAM AND THE REVOLVING

 FUND SHALL BE CREDITED WITH USER CHARGES FROM

 OTHER FEDERAL ACCOUNTS TO COVER OUR COSTS. THE

 PAYMENTS CAN BE MADE IN ADVANCE OR BY WAY OF

 REIMBURSEMENT. AND THE RATES CHARGE WILL RETURN

 THE FULL EXPENSE OF THE OPERATION. THAT IS A KEY

 SENTENCE RIGHT THERE. THERE IS A LAW OUT THERE

 ON THE BOOKS THAT REQUIRE US TO CHARGE RATES TO

 COVER THE FULL EXPENSES OF OUR PROGRAM, THAT

 INCLUDES NOT JUST SALARIES AND RENT BUT ALSO

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 INCLUDES ACCRUED AND RELIEVED DEPRECIATION,

 WORKER'S COMP, IT SYSTEMS AND SOFTWARE. SO TRULY

 WE ARE REQUIRED BY LAW TO RECOVER ALL OF OUR

 COSTS THROUGH OUR FEES. WHICH IS NO SMALL FEAT.

 I DO BELIEVE THAT AS WE COMBINE OUR FEDERAL

 FUNDING INTO A SINGLE CONSOLIDATED PROGRAM IT

 DELIVERS VALUE FOR ALL OF THE ENTIRE GOVERNMENT

 BECAUSE WE'RE ABLE TO FOCUS ON OUR MISSION AND

 RELIEVE THE RESPONSIBILITY OF SERVICING YOUR OWN

 RECORDS. ANOTHER KEY COMPONENT OF THIS

 LEGISLATION IS IN SECTION D IN PARAGRAPH ONE

 UNDER SECTION D. IT DOES REQUIRE THAT -- IT

 ALLOWS THE RECORD CENTER PROGRAM TO RETAIN UP TO

 FOUR PERCENT OF OUR REVENUE IN EXCESS OF EXPENSES

 AS AN OPERATING RESERVE OR TO REPLACE OR ACQUIRE

 CAPITAL EQUIPMENT. QUICKLY, YOU MAY THINK THAT

 SOUNDS LIKE PROFIT. WE'RE NOT ACTUALLY ALLOWED

 TO MAKE A PROFIT. ALL WE CAN DO IS SORT OF

 CREATE A BUDGET SO THAT WE CAN MAINTAIN OUR

 EQUIPMENT AND KEEP OUR SYSTEMS MODERN SO THAT WE

 CAN DELIVER HIGH CLASS SERVICES TO YOU. SO THAT

 IN ESSENCE MEANS WE ARE AN AT-COST OPERATION,

 THERE'S NO PROFIT INVOLVED. SO THOSE TWO SORT OF

 PARAGRAPHS WITHIN OUR ENABLING LEGISLATION

 REQUIRE US TO BE EXCEPTIONALLY EFFICIENT. WE

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 HAVE TO COVER ALL OF OUR COSTS BUT WE CANNOT

 CHARGE YOU MORE THAN FOUR PERCENT OVER OUR

 OPERATIONAL COSTS. SO, BUT, THE NEW FEE

 STRUCTURE -- I SAY ALL OF THIS TO SAY, THE NEW

 FEE STRUCTURE IS QUITE CONSISTENT WITH OUR

 ENABLING LEGISLATION AND OUR PRACTICE FOR THE

 PAST 20, 21 YEARS, HOWEVER LONG IT HAS BEEN, IT

 IS OUR 21ST YEAR SO I GUESS WE'RE LEGAL NOW,

 HA! HA! SO WE'RE VERY CAREFUL WHEN WE TOOK A

 LOOK AT RESTRUCTURING THE RATES TO ENSURE THAT,

 AGAIN, THE RATES ONLY COVER OUR COSTS AND DO NOT

 -- AND WE DO NOT CHARGE YOU ANY MORE THAN OUR

 COSTS. SO THE OTHER CHANGE YOU WILL NOTICE,

 WHICH HOPEFULLY IS JUST SORT OF AN ACCOUNTING

 CHANGE THAT WON'T SORT OF SHAKE ANYBODY'S WORLD,

 IS THAT WE CHANGE THE TIMING OF OUR BILLING CYCLE

 SO THAT OUR BILLS WILL BE BILLING IN ADVANCE AS

 OPPOSED TO IN ARREARS. THE OCTOBER BILL THAT YOU

 RECEIVE -- YOU WILL RECEIVE ONE BILL IN OCTOBER

 THAT CLOSES OUT SEPTEMBER. SO THAT IS ALL PRIOR

 FISCAL YEAR. BUT BEGINNING IN OCTOBER THE

 BILLING IN OCTOBER WILL BE FOR OCTOBER. SO YOU

 WILL BE BILLED WITHIN THE MONTH THAT SERVICES ARE

 BEING COVERED. AND THAT ADVANCED BILLING, IF

 THAT IS WHAT YOU WANT TO CALL IT, IT WILL

 10

 CONTINUE THROUGHOUT THE COURSE OF FY 21. AND

 THESE ARE THE TWO MAJOR CHANGES THAT WE'VE

 INTRODUCED WITH THIS INNER AGENCY AGREEMENT

 CYCLE. AND WITH THAT, I THINK I CAN TURN IT BACK

 TO GORDON. AND MAYBE OPEN UP THE FLOOR FOR

 QUESTIONS.

 SPEAKER: OKAY. DO WE HAVE ANY QUESTIONS COMING

 IN?

 SPEAKER: YES. WE HAVE AT LEAST TWO QUESTIONS

 FROM THE AUDIENCE. THE FIRST QUESTION IS: SINCE

 THE NEW RATE STRUCTURE IS RELATED TO THE COVID-19

 PANDEMIC, WILL THE RATES GO BACK TO THE OLD

 STRUCTURE ONCE THE PANDEMIC IS OVER?

 SPEAKER: YEAH, I WOULD LIKE TO TAKE THAT.

 SPEAKER: OKAY.

 SPEAKER: WE DO ANTICIPATE THAT THIS WILL BE A

 PERMANENT CHANGE TO OUR RATE STRUCTURE. THAT IS

 OUR INTENTION. IT DOES OFFER A LOT MORE FREEDOM

 AND FLEXIBILITY IN TERMS OF NOT ONLY OUR BILLING

 PROCESSES BUT ALSO IT REMOVES SORT OF ANY

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 FINANCIAL DYNAMIC WHEN IT COMES TO MAKING

 DECISIONS ABOUT DISPOSAL OR TRANSFER OR THAT SORT

 OF THING. IT ALLOWS RECORDS MANAGERS TO MANAGE

 RECORDS WITHOUT SORT OF THE WEIGHT OF FINANCES.

 SO WE BELIEVE IT IS GOING TO BE A GOOD THING FOR

 EVERYBODY. IT WILL BE AS WE ANTICIPATE A

 PERMANENT CHANGE. AND ACTUALLY IN LOOKING BACK

 THROUGH OUR HISTORY, IT IS CONSISTENT WITH THE

 WAY THE FUNDS STARTED. BACK IN 2000 WE HAD ONLY

 ONE RATE, ACTUALLY, AND IT WAS A BOX RATE THAT

 INCLUDED EVERYTHING. SO THIS SORT OF TICKLES THE

 BACK OF MY BRAIN A LITTLE BIT IN TERMS OF COMING

 FULL CIRCLE WITH THE WAY WE STRUCTURE OUR RATES.

 SPEAKER: ONE OF THE OTHER THINGS, TOO, WE

 BELIEVE THIS WILL ALLOW US TO GET OUR AGREEMENT

 INFORMATION OUT TO YOU MUCH EARLIER THAN WE

 HISTORICALLY HAVE. SO WE THINK THIS WILL HELP.

 SPEAKER: OKAY. THANK YOU, GORDON. THE SECOND

 QUESTION IS: IF MOST OF THE BASIC SERVICES ARE

 NO LONGER BEING BILLED FOR, WILL WE STILL BE ABLE

 TO TRACK THE VOLUME OF REQUESTS?

 SPEAKER: YES. THERE IS A PLAN. WHEN THE

 12

 CUSTOMER SEES THEIR INVOICE THEY STILL WILL SEE

 THE NUMBER OF REQUESTS AND WIDGETS ON THE

 INVOICE. THERE WILL JUST BE A $0 AMOUNT TO THAT.

 SO THAT INFORMATION WILL STILL BE CAPTURED.

 SPEAKER: OKAY. WE HAVE AN ADDITIONAL QUESTION

 THAT HAS COME IN, ASKING FOR CLARIFICATION. DID

 I HEAR CORRECTLY THAT NO SEPARATE CHARGES FOR

 DESTRUCTION WILL BE CHARGED THIS YEAR, FORMERLY

 THE D ONE CHARGE

 SPEAKER: THAT IS CORRECT, EFFECTIVE AS OF

 OCTOBER 1ST, ALL DESTRUCTION, OCTOBER 1ST MOVING

 FORWARD, IS COVERED UNDER THE STORAGE CHARGE NOW.

 SO THERE IS NO FEE FOR DESTRUCTION. IT IS

 COVERED IN THE STORAGE COSTS.

 SPEAKER: THANK YOU, GORDON. I DON'T SEE ANY

 FURTHER QUESTIONS FROM THE AUDIENCE. BUT A

 REMINDER, IF YOU HAVE ANY, PLEASE DROP THEM IN

 DURING THE MEETING AND WE WILL ASK THEM AT THE

 GENERAL PORTION AT THE END

 SPEAKER: AND I WILL WOULD ALSO ASK IF ANY

 CUSTOMERS HAVE ANY PARTICULAR QUESTIONS AROUND

 13

 THAT, ALSO, THEY CAN GET TO THEIR ACCOUNT

 MANAGERS OR MYSELF AND WE WILL GLADLY FOLLOW-UP

 ON THOSE QUESTIONS AROUND THE AGREEMENT AND THE

 RATES. THANK YOU.

 SPEAKER: OKAY. THANK YOU. THANK YOU,

 EVERYBODY. NOW PLEASE WELCOME LAWRENCE BACK TO

 THE PRESENTATION AS HE WILL BE PRESENTING AN

 UPDATE ON NARA'S BULLETIN 2020-02 AND 2020-01

 SPEAKER: THANKS, KAREN. I ALREADY GOT AN E-MAIL

 ON SUGGESTIONS FOR HOW TO DO THANKSGIVING, AND

 KAREN I SEE WHERE WE'RE THINKING ALIKE. I SEE

 THAT YOU ARE PLANNING ON DOING IT IN THE GARAGE

 WITH OUT DOOR SPACE HEATERS. YOU KNOW, WE MAY BE

 GOING DOWN THAT PATH AS WELL. IF ANYBODY ELSE

 HAS ANY MORE ORIGINAL IDEAS TO GET THROUGH THE

 HOLIDAYS SAFELY, SEND THEM IN. AT THIS POINT,

 THOUGH, LET'S NOT TALK ABOUT COVID AND HOLIDAYS

 AND FOCUS ON TWO BULLETINS THAT WE ISSUED AT THE

 END OF SEPTEMBER.

 SO WE WERE WORKING VERY HARD TO TRY AND GET BOTH

 OF THESE BULLETINS OUT BEFORE THE END OF THE

 FISCAL YEAR SO WE COULD START THE NEW YEAR FRESH

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 WITH NEW GUIDANCE. SO I'M HAPPY TO TALK TO YOU

 ABOUT BOTH OF THESE TODAY. FIRST I WILL TALK

 ABOUT IS NARA BULLETIN 2020-02. THE NEXT SLIDE,

 PLEASE.

 SO YOU CAN SEE A FEW BULLET POINTS ON THE SLIDE.

 THIS SHOULD LOOK FAMILIAR TO ALL OF YOU AS IT

 SUPERCEDES WHAT WE USED TO CALL THE 15-YEAR

 BULLETIN THAT WAS COVERING EARLY TRANSFER. SO

 THAT REQUIREMENT STILL STANDS HOWEVER WHAT WE'VE

 DONE IN THIS BULLETIN IS NOW INCLUDED PROVISIONS

 FOR LATE TRANSFER. SO IT IS ESSENTIALLY WE'VE

 GOT THE BOOKENDS IN PLACE, 15 FOR EARLY, 30 YEARS

 FOR LATE. AND THE PROVISIONS FOR CLASSIFIED ARE

 STILL IN PLACE. SO INSTEAD OF 15 FOR CLASSIFIED

 IT WOULD BE 25. AND WE HAVE KEPT THOSE

 PROVISIONS AS WELL. ONE OF THE THINGS THAT WE

 ALSO HAVE KEPT IN PLACE ARE THE CHECKLISTS FOR

 EARLY TRANSFER AND THEN WE'VE ADDED A CHECKLIST

 FOR YOU TO FILL OUT FOR A PROPOSED LATE TRANSFER.

 SO IT IS A PRETTY STRAIGHTFORWARD BULLETIN. IT

 INCLUDES OUR RATIONAL FOR WHY WE ARE PROVIDING

 THIS GUIDANCE AROUND BOTH EARLY AND LATE

 TRANSFER. AND, AGAIN, THE CHECKLISTS ARE THERE

 FOR YOU TO REVIEW THE CASES WHERE YOU THINK AN

 15

 EXCEPTION MAY BE NEEDED AND THEN YOU CAN GET IN

 TOUCH WITH US VIA YOUR APPRAISAL ARCHIVIST AND

 REVIEW THOSE SPECIFIC SITUATIONS. SO, AGAIN,

 FAIRLY STRAIGHTFORWARD. I'M GLAD TO GET THIS

 OUT. THIS IS ONE OF THE THINGS THAT WE WANTED TO

 MAKE SURE WE COVERED BECAUSE WHILE WE HAD THE

 EARLY TRANSFER WE DIDN'T HAVE ANYTHING IN PLACE

 FOR LATE TRANSFER. THE NEXT SLIDE, PLEASE.

 SO THIS IS ONE THAT I KNOW WE'VE BEEN PROMISING

 FOR SOME TIME AND I WANT TO SPEND QUITE A BIT

 MORE TIME ON THIS BULLETIN AS WE'VE HAD MANY

 QUESTIONS ABOUT IT. SO NEXT SLIDE.

 AS YOU CAN SEE, QUESTIONS, QUESTIONS, QUESTIONS.

 AND REALLY WHAT THIS GETS TO IS WHEN THE

 MEMORANDUM CAME OUT IN 1921 BACK IN JUNE OF 2019

 THERE WAS LANGUAGE THAT SAID NARA WOULD PROVIDE

 FURTHER GUIDANCE. WE HAVE BEEN WORKING ON IT AND

 IT HAS TAKEN TIME TO DO THIS INTERNALLY AND WITH

 OMB. ONE OF THE BENEFITS IS THAT IT ALLOWED US

 TO HEAR MORE FROM YOU ABOUT WHAT YOUR QUESTIONS

 ARE. SO WE WERE ABLE TO FOLD THOSE QUESTIONS

 INTO THIS GUIDANCE THAT WE ISSUED LAST MONTH JUST

 TO MAKE IT THAT MUCH MORE RESPONSIVE TO THE

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 QUESTIONS AND CONCERNS THAT YOU HAVE. SO REALLY

 WHAT WE'RE TRYING TO DO, IF WE CAN GO TO THE NEXT

 SLIDE, IS COVER A NUMBER OF THINGS IN THE

 BULLETIN. WE HAVE SEPARATED IT OUT INTO FOUR

 GENERAL CATEGORIES, SOME GENERAL QUESTIONS THAT

 WE RECEIVED, SOME CLARIFICATIONS THAT AGENCIES

 HAD REQUESTED AND THEN WE FOCUSED QUITE A BIT ON

 THE EXCEPTION PROCESS AND NOT ONLY WHAT THE

 EXCEPTIONS LIST INCLUDES BUT HOW TO SUBMIT THEM.

 AND THEN WE ADDRESSED QUESTIONS THAT WE HAVE BEEN

 HEARING AROUND STORAGE FACILITIES AND SCHEDULING

 AND TRANSFER. THE NEXT SLIDE.

 OKAY. SO I WANT TO START WITH SOME OF THE

 GENERAL CATEGORIES THAT ARE COVERED IN THE NEW

 GUIDANCE. AS I SAID, WHILE THE CLARIFICATIONS

 AND THE GENERAL QUESTIONS ARE IMPORTANT, MUCH OF

 WHAT IS IN THE BULLETIN COVERS THE EXCEPTIONS

 THAT WERE IDENTIFIED AS SOMETHING THAT WE WOULD

 WORK ON WITH THIS GUIDANCE RELATED TO M 19-21.

 THERE ARE A LOT OF SPECIFICS IN THE BULLETIN,

 WHICH I WILL GET TO IN A SECOND, BUT GOING BACK

 TO THE M 1921 MEMO, THERE WERE THREE GENERAL

 CATEGORIES WHERE AGENCIES SHOULD FIRST EVALUATE

 THE IMPACT OF THE MEMO ON THEIR COMPLIANCE AND

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 THESE THREE CATEGORIES ARE HERE, WHETHER OR NOT

 COMPLYING WITH THE BULLETIN AND GOING ELECTRONIC

 FULLY WOULD IMPOSE A BURDEN ON THE PUBLIC, ON

 WHETHER THE COST WOULD EXCEED THE BENEFIT OR IF

 THERE WAS A STATUTE, REGULATION THAT WOULD

 PROHIBIT THE TRANSITION FROM ANALOG TO FULLY

 ELECTRONIC. SO THOSE ARE GENERAL CATEGORIES.

 AND THEN WE START THERE AND THEN MOVE ON TO THE

 SPECIFICS. SO WE SHOULD BE ON SLIDE 12, OTHER

 CONSIDERATIONS. THANK YOU. SO IN ADDITION TO

 GENERAL CATEGORIES THAT WERE IN THE MEMO, WE

 ADDED TO THE NEW BULLETIN SOME MORE SPECIFIC

 CATEGORIES. ONE OF THE THINGS THAT WE FELT WAS

 IMPORTANT AND WAS NOT HIGHLIGHTED IN THE MEMO IS

 THAT RECORDS WITH POTENTIALLY EXTRINSIC VALUE IS

 SOMETHING THAT WE WANTED TO HAVE THE ABILITY TO

 DISCUSS WITH AGENCIES. SO WE WOULDN'T WANT, YOU

 KNOW, AN AGENCY TO DIGITALIZE AND DISPOSE OF

 ANALOG RECORDS WITHOUT GETTING IN TOUCH WITH US.

 THERE IS, ALSO, MORE INFORMATION IN THIS BULLETIN

 ABOUT CLASSIFIED RECORDS AND OBVIOUSLY WE WILL

 NEED TO DEAL WITH SOME OF THOSE ISSUES ON A CASE

 BY CASE BUT THERE IS A GENERAL PLACE HOLDER IN

 QUESTION THAT JUST CALLS THAT OUT AND HIGHLIGHTS

 IT AS AN ISSUE THAT IS SOMETHING THAT WE WILL

 18

 HAVE TO WORK THROUGH IN SOME CASES. AND THEN

 FRAGILE RECORDS, WHERE AGENCIES MAY HAVE OLDER

 RECORDS OR RECORDS ON FRAGILE MEDIUM THAT WOULD

 NOT BE APPROPRIATE FOR SCANNING OR COST

 PROHIBITIVE TO SCAN. SO THERE ARE OTHER AREAS

 WHERE, YOU KNOW, WE'VE HEARD THE QUESTIONS AND WE

 NOTICED THAT WE NEED TO HAVE A CONVERSATION ABOUT

 HOW TO MOVE FORWARD IN THOSE CIRCUMSTANCES. THE

 NEXT SLIDE, PLEASE.

 SO LET'S TALK PROCESS A LITTLE BIT. THERE'S

 QUITE A BIT IN THE BULLETIN THAT DOES GET TO WHAT

 AGENCIES NEED TO DO AND HOW THEY SHOULD SUBMIT

 EXCEPTIONS. ONE OF THE THINGS THAT WE ARE ASKING

 AGENCIES TO DO TO THE FULLEST EXTENT POSSIBLE IS

 TO DEVELOP A SINGLE COMPREHENSIVE REQUEST. SO WE

 KNOW THAT THERE ARE GOING TO BE A NUMBER OF

 REQUESTS COMING IN FROM AGENCIES AND WE WANT TO

 TRY AND WORK THROUGH THEM AS EXPEDITIOUSLY AS

 POSSIBLE AND I THINK IT WILL BE HELPFUL NOT ONLY

 FOR US BUT FOR YOU IF AGENCIES TAKE THE TIME TO

 SORT OF PULL THEM ALL TOGETHER AND SUBMIT THEM AS

 ONE REQUEST. SO IT IS PART OF -- PARTLY A REASON

 TO TRY AND KEEP THINGS SORT OF FOCUSED AND MOVING

 ALONG, BUT WE ALSO DON'T WANT TO HAVE TO DEAL

 19

 WITH, YOU KNOW, ONE'S AND TWO'S AS WE GO THROUGH

 THE NEXT COUPLE OF YEARS. SO WE UNDERSTAND THERE

 IS ALWAYS GOING TO BE EXCEPTIONS TO THAT AND

 SITUATIONS WILL ARISE THAT YOU MAY NOT

 ANTICIPATE, WE UNDERSTAND THAT. BUT TO THE

 GREATEST EXTENT POSSIBLE, WE DO WANT AGENCIES TO

 DO ONE COMPREHENSIVE REQUEST IF POSSIBLE. SO ONE

 OF THE THINGS THAT WE ALSO WANT AGENCIES TO SORT

 OF CONNECT IN THESE REQUESTS IS HOW DOES THE

 SPECIFIC REQUEST AND THE RECORDS THAT THEY RELATE

 TO RELATE TO SORT OF THE STRATEGIC PLAN THAT THE

 AGENCY HAS IN PLACE FOR MOVING FULLY ELECTRONIC.

 SO WE WANT TO TRY TO CONNECT THE OPERATIONAL TO

 STRATEGIC AND HOPEFULLY IT WILL BE BORN OUT IN

 THE REASONS THAT AGENCIES NEED TO TELL US ABOUT,

 AS THEY SUBMIT THEIR REQUESTS, AND IT SHOULD

 COVER THINGS LIKE, AND I WILL GET INTO MORE

 DETAIL ABOUT THIS, BUT IT SHOULD COVER HOW LONG

 THEY NEED THE EXCEPTION FOR AND ANY PLANS THAT AN

 AGENCY WOULD NEED TO COME INTO FULL COMPLIANCE.

 SO IN TERMS OF SUBMITTING, WE ARE SAYING IN THE

 BULLETIN THAT THE REQUESTS SHOULD BE SIGNED AND

 SUBMITTED BY THE AGENCY, SENIOR AGENCY OFFICIAL

 RECORDS MANAGEMENT, AND THAT WE'VE SET UP A

 DEDICATED E-MAIL BOX WHERE YOU CAN SUBMIT YOUR

 20

 REQUEST TO US. THE NEXT SLIDE. SO IN HOW YOU

 ARE THINKING ABOUT SUBMITTING YOUR REQUESTS, I

 MEAN, WE ENCOURAGE YOU TO THINK ABOUT HOW YOU

 WOULD BUILD A BUSINESS CASE TO SUPPORT THE

 EXCEPTIONS THAT YOU NEED. SO WE SAID WE WANTED

 IT TO BE COMPREHENSIVE, STRATEGIC, BUT WE WANTED

 ALL OF THE FACTORS THAT SORT OF UNDERLINE THE

 BUSINESS NEEDS FOR WHY YOU NEED TO HAVE THIS

 EXCEPTION SO THAT WE CAN VERY CLEARLY SEE AND

 EVALUATE WHY IT IS IMPORTANT FOR YOU TO GET AN

 EXCEPTION TO M 1921. SO THERE ARE A LOT OF

 ELEMENTS THAT I'M SURE ARE GOING TO GO INTO YOUR

 BUSINESS CASE. WE EXPECT YOU TO IDENTIFY ALL OF

 THOSE ELEMENTS AND BE ABLE TO CONNECT THEM. AND

 SOME OF THOSE THINGS ARE ON THE SLIDE THAT WE

 WILL BE LOOKING TO SEE IN ANY REQUESTS THAT YOU

 SEND US. DESCRIPTIVE INFORMATION, INCLUDING THE

 APPROVED DISPOSITION AUTHORITY FOR THE RECORDS IN

 QUESTION, THE VOLUME OF THE RECORDS THAT ARE

 AFFECTED, THE COSTS THAT YOU ARE GOING TO INCUR

 TO DIGITALIZE OR PROVIDE REFERENCE AND, OF

 COURSE, IF THERE ARE LEGAL ISSUES AROUND

 OWNERSHIP OR ACCESS, WE WOULD WANT TO KNOW THAT

 AS WELL. AND THE LAST ONE IS IMPORTANT, TOO,

 TIME ESTIMATES ON HOW LONG AN EXCEPTION WILL BE

 21

 NEEDED. THIS IS WHERE WE GET INTO THE

 DISTINCTION BETWEEN AN EXCEPTION AND AN

 EXTENSION. WE HAVE HEARD FROM A NUMBER OF

 AGENCIES WHERE THEY HAVE A PLAN TO GO FULLY

 ELECTRONIC BUT THEY CANNOT GET THERE BY 2022. SO

 THEY ARE TELLING US THAT, WELL, WE CAN DO WHAT

 THE MEMO REQUIRES BUT WE CAN NOT GET INTO FULL

 COMPLIANCE UNTIL 2024, FOR EXAMPLE. SO THAT IS A

 SITUATION WHERE WE JUST NEED TO UNDERSTAND AND

 KNOW THE CIRCUMSTANCES, THE PLAN, THE PROJECT

 PLAN THAT YOU HAVE IN PLACE TO MAKE THIS

 TRANSITION. AND THEN REVIEWING THE EXTENSION IS

 IN MY VIEW A LITTLE BIT MORE STRAIGHTFORWARD THAN

 REVIEWING AN EXTENSION WHERE SOMETHING IS NEEDED

 INDEFINITELY. SO IF THAT IS THE CASE FOR A

 PARTICULAR RECORD SERIES, PLEASE LET US KNOW,

 GIVE US THE PROJECT PLAN, LET US KNOW WHEN YOU

 CAN BE IN FULL COMPLIANCE. THE NEXT SLIDE.

 SO I DIDN'T WANT TO CLOSE BEFORE TALKING A LITTLE

 BIT ABOUT WHAT NARA IS GOING TO DO ONCE WE

 RECEIVE YOUR REQUEST FOR AN EXCEPTION OR AN

 EXTENSION TO THE REQUIREMENTS IN M 1921. SO

 THERE IS A PROCESS INVOLVED. OBVIOUSLY, WE ARE

 GOING TO REVIEW IT INTERNALLY. IT IS GOING TO BE

 22

 THROUGH INTERNAL NARA STAKE HOLDER UNITS FOR

 THEIR COMMENT AND FEEDBACK, THE CUSTODIAL UNITS

 WHO HAVE A LOT OF INFORMATION AND KNOWLEDGE ABOUT

 RECORDS, AND THEN WE ALSO DO NEED TO COORDINATE

 EXTERNALLY WITH OMB. WE HAVE NOT DONE THIS

 PROCESS BEFORE. SO THERE IS A LOT OF UNKNOWNS IN

 TERMS OF HOW THIS WILL PLAY OUT. AS I NOTED, WE

 ARE GOING TO WORK THROUGH REQUESTS AS WE RECEIVE

 THEM, AS EXPEDITIOUSLY AS WE CAN, BUT AT THIS

 POINT WE ARE NOT SETTING A TIME FRAME FOR HOW

 LONG IT WILL TAKE TO RESOLVE THE REQUESTS BECAUSE

 ALL OF THE REQUESTS ARE GOING TO BE DIFFERENT,

 THEY ARE GOING TO HAVE THEIR OWN LEVELS OF

 COMPLEXITY, AND WE CANNOT REALLY PREDICT HOW THE

 COORDINATION IS GOING TO GO WITH OMB AND HOW

 STREAMLINED THE PROCESS WILL WORK. SO THERE ARE

 A NUMBER OF FACTORS THAT WE NEED TO FIGURE OUT

 AND WORK THROUGH THE PROCESS A COUPLE OF TIMES

 AND THEN WE WILL BE ABLE TO PROVIDE MORE INPUT

 AND FEEDBACK BACK TO AGENCIES AFTER WE RECEIVE

 REQUESTS ON HOW LONG WE EXPECT IT TO TAKE. SO AT

 THIS POINT WE ARE LEAVING IT OPEN, KIND OF, AND

 WORKING THROUGH IT A BIT, A FEW TIMES, AND SEE

 HOW IT GOES AND THEN WE SHOULD HAVE A BETTER

 HANDLE ON HOW IT IS GOING TO GO GOING FORWARD.

 23

 ONE THING THAT I DID WANT TO NOTE IS THE

 RECOMMENDATIONS ON WHETHER TO APPROVE OR DENY A

 SUBMITTED EXCEPTION. ULTIMATELY, IT COMES DOWN

 TO NOT ONLY OMB AND THE FEEDBACK THAT WE PROVIDE

 TO OMB, BUT, ALSO, TO THE ARCHIVIST FROM THE

 UNITED STATES WHO FROM NARA'S SIDE OF THINGS WILL

 BE THE FINAL DECIDER ON THE ULTIMATE DISPOSITION

 OF AN AGENCY'S EXCEPTION REQUEST. SO IT IS A

 RIGOROUS PROCESS WHERE WE ARE GOING TO BE WORKING

 THROUGH THIS, NOT ONLY INTERNALLY WITH OMB BUT

 ALSO WITH ALL OF YOU, AND YOU SHOULD EXPECT THAT

 WE MAY HAVE QUESTIONS AND WILL WANT TO GET BACK

 IN TOUCH WITH YOU TO GET FURTHER INFORMATION AND

 DETAILS AS WE REVIEW EACH REQUEST THAT WE

 RECEIVE. SO WITH THAT, I WILL PAUSE AND SEE IF

 ANYONE HAS QUESTIONS ABOUT EITHER OF THE

 BULLETINS.

 SPEAKER: THANK YOU, LAWRENCE. WE DO HAVE A

 COUPLE OF QUESTIONS THAT HAVE COME IN. THE FIRST

 ONE: HAVE THERE BEEN ANY DISCUSSIONS IN REGARDS

 TO HAVING THE 2022 DEADLINE BEING EXTENDED?

 SPEAKER: SO THERE HAVE NOT BEEN ANY DISCUSSIONS

 YET. AND WE DID ADDRESS THIS IN THE NEW

 24

 BULLETIN. ONE OF THE THINGS THAT WE HAD BEEN

 SAYING ALL ALONG, IS THAT RIGHT NOW WE ARE ALL

 FOCUSED ON COVID, MAKING SURE EVERYBODY IS SAFE

 AND HEALTHY, AND DEVELOPING OUR AGENCY PLANS ON

 HOW TO RE-OPEN AND GET PEOPLE BACK IN THE

 BUILDINGS. THAT REALLY HAS TAKEN THE TIME AND

 REALLY THE BAND WIDTH OF THE SENIOR MANAGERS IN

 OUR AGENCY AND YOURS AS WELL. SO WE HAVE NOT

 BECAUSE OF THAT AND OUR FOCUS ON THAT ISSUE BEEN

 ABLE TO HAVE ANY DISCUSSIONS WITH OMB AT THIS

 POINT. I CAN ASSURE YOU THAT WE WILL GET THERE

 AND WE WILL HAVE THOSE DISCUSSIONS. BUT AT THIS

 POINT WITH THE DEADLINE STILL TWO YEARS AWAY, WE

 FEEL LIKE WE HAVE SOME TIME TO SORT THROUGH IT,

 GET THROUGH THE PRESSING NEED TO KEEP PEOPLE SAFE

 AND RE-OPEN OUR BUILDINGS NOW AND THEN WE CAN

 HAVE THOSE DISCUSSIONS. SO I THINK AS YOU GO

 FORWARD, YOU SHOULD CONSIDER THAT AS YOU ARE

 DEVELOPING YOUR REQUESTS AND ASSUME THAT THE

 TARGETS ARE NOT GOING TO BE CHANGED AND THEN WE

 CAN WORK WITH YOU ON YOUR REQUESTS. IF THEY DO

 GET CHANGED, THEN PERHAPS IF ALL OF YOU ARE

 REQUESTING IS A SHORT EXTENSION COULD BE OBE AT

 THAT POINT. SO STAY TUNED, WE WILL GET THERE AND

 HAVE THOSE DISCUSSIONS, WE'RE JUST NOT THERE

 25

 RIGHT NOW

 SPEAKER: THANK YOU. THE OTHER QUESTION

 DOVETAILS OFF YOUR RESPONSE THERE. SHOULDN'T

 COVID-19, THE PANDEMIC, BE AN EXCEPTION?

 SPEAKER: SO THE MEMO IS ABOUT GOING FULLY

 ELECTRONIC. AND THAT GOAL, THAT TARGET HAS NOT

 CHANGED. WE STILL IN SPITE OF THE PANDEMIC NEED

 TO CONTINUE TO THE BEST ABILITY THAT WE HAVE TO

 WORK ON MOVING FULLY ELECTRONIC. YEAH, SURE,

 COVID WILL AFFECT THAT AND IT MAY IMPACT IN

 CERTAIN CIRCUMSTANCES OUR ABILITY TO DIGITALIZE

 RECORDS OR DO THE WORK THAT WE NEED TO DO. IN

 THOSE CASES, THAT MAY BE TRUE, THAT COVID MAY BE

 A REASON WHY AN AGENCY NEEDS AN EXTENSION. SO I

 THINK THAT IS WHERE I THINK AGENCIES NEED TO

 EVALUATE THE DIFFERENCE BETWEEN AN EXCEPTION AND

 AN EXTENSION, AND I THINK IN THOSE CASES I COULD

 CERTAINLY SEE THAT AS BEING A REASON FOR NEEDING

 MORE TIME TO GET THE WORK DONE. BUT, STILL, IN

 ORDER TO REQUEST AN EXTENSION, BECAUSE WE NEED TO

 GET THROUGH COVID, WE STILL NEED TO UNDERSTAND

 THE PLAN, THE SERIES OF RECORDS THAT WILL BE

 AFFECTED BY THIS EXTENSION, AND THE DETAILS

 26

 UNDERLYING IT. SO I THINK THAT IS PROBABLY THE

 BEST WAY TO APPROACH IT. I THINK IF YOU ARE

 LOOKING FOR AN EXCEPTION IT IS REALLY IMMATERIAL

 FROM COVID, IF IT IS THE KIND OF, YOU KNOW,

 GENERAL EXCEPTION THAT WE DISCUSSED EARLIER,

 COVID WILL NOT HAVE THAT KIND OF IMPACT. FOR AN

 EXTENSION, IT MAY BE SOMETHING THAT YOU NEED TO

 TALK TO US ABOUT FIRST AND THEN WE CAN WORK

 TOGETHER ON WHAT YOU WOULD NEED TO SUBMIT TO US

 FOR REVIEW.

 SPEAKER: ANY OTHER QUESTIONS?

 SPEAKER: I DON'T SEE ANY COMING IN AT THIS

 MOMENT. AS A REMINDER TO THE PARTICIPANTS, YOU

 CAN SUBMIT QUESTIONS ON THE CHAT OR E-MAIL THEM

 TO US

 SPEAKER: I WILL SAY YOU CAN CERTAINLY SEND IN A

 CHAT AND IF WE -- THERE IS TIME AT THE END OF THE

 MEETING WE CAN TAKE UP YOUR QUESTION THEN. OR

 SEND AN E-MAIL TO RM COMMUNICATIONS, AS YOU SEE

 ON THE SLIDE, AND WE WILL BE SURE TO GET AN

 ANSWER BACK TO YOU. WITH THAT, I WILL TURN IT

 BACK TO YOU

 27

 SPEAKER: THANK YOU. NOW PLEASE WELCOME LISA,

 THE DIRECTOR OF RECORDS MANAGEMENT AND POLICY

 OUTREACH WHO WILL PRESENT ON TRANSITION AND

 FEDERAL RECORDS MANAGEMENT

 SPEAKER: HI. THANK YOU VERY MUCH. WELCOME

 EVERYBODY TO THIS, MY PORTION OF TODAY'S BRIDG

 MEETING. I WOULD LIKE TO TALK A LITTLE BIT ABOUT

 TRANSITION AND FEDERAL RECORDS MANAGEMENT. SO IF

 WE CAN GO TO THE NEXT SLIDE, WE WILL START AT THE

 BEGINNING.

 SO I ALWAYS -- I KNOW THAT THERE ARE MANY MEMBERS

 OF OUR FEDERAL RECORDS MANAGEMENT COMMUNITY THAT

 HAVE BEEN THROUGH TRANSITIONS BEFORE AND THEY

 SORT OF KNOW THE ROPES. BUT I THOUGHT THAT FOR

 THOSE OF YOU WHO ARE NEW, WHO MAY BE NEW TO

 FEDERAL SERVICE AND NEW TO FEDERAL RECORDS

 MANAGEMENT, WE CAN START AT THE BEGINNING AND

 COVER A FEW BASIC THINGS.

 SO BEAR WITH ME IF THIS IS A REPETITION FOR YOU.

 FIRST I WANT TO TALK ABOUT WHAT IS A PRESIDENTIAL

 TRANSITION. IT IS WORDS THAT MAY HAVE BEEN

 28

 THROWN AROUND QUITE FREQUENTLY OR YOU HEAR THEM

 IN THE NEWS BUT I WOULD LIKE TO POINT OUT AND

 TALK ABOUT WHAT IT IS SPECIFICALLY. IT IS THE

 PROCESS FOR PLANNING FOR A NEW PRESIDENTIAL TERM.

 YOU WILL ALSO HEAR ME USE THE WORDS PRESIDENTIAL

 TRANSITION OR ADMINISTRATION TRANSITION, THE

 ADMINISTRATION AND PRESIDENT SYNONYMS. WE'RE

 LOOKING FOR A NEW PRESIDENT TO ENTER THE OFFICE

 OR TO START A SECOND TERM, IS WHAT WE'RE TALKING

 ABOUT, IT DOESN'T MATTER WHO WINS THE ELECTION,

 BECAUSE FROM OUR PERSPECTIVE THERE IS ALWAYS A

 TRANSITION. EVERY FOUR YEARS THERE IS A

 TRANSITION AND IT IS SOMETHING THAT WE NEED TO

 PLAN AND PREPARE FOR. I'VE ALSO PUT ON THE SLIDE

 FOR THOSE OF YOU WHO WANT TO LOOK AT A LITTLE BIT

 MORE INFORMATION, I'M CALLING IT MY LEGAL

 FOOTNOTES ON THE BOTTOM. THERE ARE LAWS THAT

 GOVERN HOW A TRANSITION WORKS. IT IS NOT

 SOMETHING WE MAKE UP. THERE IS A PROCESS, THERE

 ARE STEPS IN PLACE, AND I THINK THAT I WOULD SAY

 FROM MY 30 YEARS OF EXPERIENCE THAT I HAVE

 WATCHED EACH TRANSITION GET A LITTLE BETTER AND

 THE REASONABLE, GOOD, REASONABLE AND EFFICIENT

 GOVERNMENT PART OF THIS PROCESS IS LOOKING AT

 WAYS TO DO TRANSITION A LITTLE BIT BETTER AND

 29

 THAT IS WHY YOU CAN SEE THE LAWS HAVE BEEN

 UPDATED FROM 2000 TO 2010, 2015 AND EVEN 2019.

 ONE OF THE CHANGES THAT HAPPENED IN THE PAST TEN

 YEARS IS THAT TO SUPPORT TRANSITION THERE IS A

 BYLAW, A CENTER FOR PRESIDENTIAL TRANSITION THAT

 IS RUN BY THE PARTNERSHIP FOR PUBLIC SERVICE OR

 PPS. AND FOR THOSE OF YOU IN THE FEDERAL SPACE,

 PPS MIGHT BE RINGING A BELL. THAT IS THE SAME

 ORGANIZATION THAT RUNS THE EMPLOYEE VIEWPOINT

 SURVEY, AND THE BEST PLACES TO WORK IN

 GOVERNMENT. THEY ARE A NONPARTISAN, NONPROFIT

 ORGANIZATION. AND WHAT THEIR ROLE IS IN

 TRANSITION IS CREATING A CENTER FOR PRESIDENTIAL

 TRANSITION AND PULLING TOGETHER ALL SORTS OF

 SOURCES OF INFORMATION AND RESOURCES AND BEING A

 PLACE THAT CAN COMMUNICATE AND FOCUS ON

 TRANSITION WITHOUT HAVING EITHER OF THE PARTIES

 OR ADMINISTRATIONS HAVING TO FOCUS ON THAT FROM

 THE PERSPECTIVE OF THEY ARE RUNNING CAMPAIGNS.

 YOU DON'T WANT TO RUN FOR A CAMPAIGN AND PERHAPS

 FOCUS ON THE ADMINISTRATIVE PARTS OF A

 PRESIDENTIAL TRANSITION. I WILL ALSO HIGHLIGHT,

 AS I SAID, WE'RE STARTING AT THE BEGINNING, SO IF

 ANYBODY IS NEW TO TRANSITION AND THEY WANTED TO

 30

 LEARN MORE ABOUT WHAT TRANSITIONS ARE LIKE, I

 RECOMMEND GOING TO THEIR WEBSITE. THEY HAVE A

 WEALTH OF RESOURCES THERE. AND, IN FACT, ON THE

 NEXT SLIDE, SLIDE 19, I'VE PUT A SCREENSHOT UP OF

 THEIR WEBSITE. AS YOU CAN SEE, THEY ARE FOCUSED

 ON INFORMATION AND RESOURCES FOR CAMPAIGN TEAMS,

 FOR TRANSITION TEAMS, FOR CONGRESS AND THE MEDIA.

 AND I WOULD SAY IF YOU ARE NEW THIS IS A GOOD

 RESOURCE TO USE TO LEARN. ONE OF MY FAVORITES IS

 NOT ONLY DO THEY HAVE A BLOG BUT A POD CAST AND

 I'VE BEEN LISTENING TO THE POD CAST AND IN

 GENERAL THINKING ABOUT HOW TRANSITION WORKS. SO

 THAT IS A RESOURCE FOR YOU. ON THE NEXT SLIDE, I

 WOULD LIKE TO POINT OUT, EACH AGENCY MUST

 DESIGNATE A SENIOR CAN CAREER OFFICIAL IN CHARGES

 OF TRANSITION PLANNING, BRIEFING AND SUCCESSION

 PLANNING. ON SEPTEMBER 4TH, OMB ISSUED A MEMO,

 WHICH WE ALL LOVE OUR MEMOS, THIS IS M 2033 AND

 IT DIRECTS AGENCIES TO DESIGNATE THOSE CAREER

 OFFICIALS, AS THE LAW REQUIRES. IT SAYS EVERY

 AGENCY MUST HAVE THIS DESIGNATION, THIS PERSON IN

 PLACE, AND THAT INCLUDES EVERY COMPONENT AGENT

 AND EVEN MAJOR SUBCOMPONENTS, THAT THEY ALL NEED

 TO HAVE THEIR TRANSITION OFFICIALS BY NOW. THERE

 ALSO ARE TWO COUNCILS THAT ARE FORMED BY LAW, AND

 31

 SUPPORTED BY THE CENTER, ONE IS THE WHITE HOUSE

 TRANSITION COORDINATING COUNCIL AND THE OTHER IS

 THE AGENCY TRANSITION DIRECTORS COUNCIL. AS I

 SAID, IF YOU ARE INTERESTED IN THESE COUNCILS OR

 IN MORE, THERE ARE RESOURCES FOR YOU TO GO AND

 LOOK. BUT WHAT I WANTED TO POINT OUT FROM THIS

 PERSPECTIVE FOR THE FEDERAL COMMUNITY, THERE ARE

 GROUPS AND PEOPLE WHO HAVE BEEN WORKING ON

 TRANSITION, ACTIVELY LOOKING AT SUCCESSION PLANS

 AND BRIEFING BOOKS AND THINKING ABOUT HOW TO DO

 TRANSITION. AND AS PART OF THEIR ROLES THAT THEY

 HAVE IS ABOUT RECORDS MANAGEMENT. HOW DO I KNOW

 THAT THEY HAVE BEEN THINKING ABOUT RECORDS

 MANAGEMENT? IF WE COULD GO TO THE NEXT SLIDE,

 PLEASE, AND I WILL ANSWER THAT QUESTION IN A

 MINUTE BECAUSE I WANTED TO TALK ABOUT, NOT ONLY

 THE LEGAL REQUIREMENTS OF THE PPS HELPS TO SET

 UP, BUT ALSO NARA'S RESPONSIBILITIES. AS AN

 AGENCY WE HAVE THREE MANAGER RESPONSIBILITIES

 THAT COME ARE RELATED TO TRANSITION. THE FIRST

 ONE, WHICH IS REALLY INTERESTING, AND I'M ALWAYS

 EXCITED AND INTERESTED TO SEE WHAT OUR COLLEAGUES

 ARE DOING ON THE OTHER AND IN ANOTHER PART OF

 NARA, IS THAT WE'RE RESPONSIBLE FOR TRANSITIONING

 PRESIDENTIAL RECORDS FROM THE WHITE HOUSE BEFORE

 32

 A NEW PRESIDENT IS I GO AUGUST RATED. WE RUN THE

 PRESIDENTIAL LIBRARY, THE PRESIDENTIAL CENTERS,

 SO THAT IS A HUGE PART OF OUR MISSION AND

 INTERESTING, EXCITING AND UNFORTUNATELY FOR YOU,

 NOT WHAT I AM TALKING ABOUT TODAY. I ALSO WILL

 NOT TALK ABOUT ITEM NUMBER THREE BECAUSE WE ALSO

 ARE AN AGENCY AND WE HAVE TO PREPARE FOR

 TRANSITION, LIKE EVERY OTHER AGENCY DOES. WE

 HAVE OUR COORDINATOR AND WE PUT TOGETHER OUR

 PLANS. ALTHOUGH WE ARE A VERY, AS YOU KNOW,

 WE'RE A MEDIUM SIZED TO SMALL AGENCY AND WE ONLY

 HAVE ONE POLITICAL APPOINTEE. SO WE'RE IN GOOD

 SHAPE AS FAR AS THAT GOES. WE HAVE A LITTLE

 EASIER PATH WHEN IT COMES TO PREPARATION AS AN

 AGENCY. AND WHAT I WANT TO FOCUS ON TODAY, FOR

 THIS BRIDG SESSION, IS TALKING ABOUT THE SECOND

 POINT, THAT WE HAVE A RESPONSIBILITY TO PROVIDE

 GUIDANCE AND SUPPORT TO HELP ENSURE THAT INCOMING

 AND OUTGOING OFFICIALS FOLLOW FEDERAL RECORDS

 MANAGEMENT REQUIREMENTS. WE ARE ONE OF THE FOUR

 SUPPORT AGENCIES THAT HELPS TO SUPPORT

 TRANSITION. THERE ARE THREE OTHER AGENCIES AS

 WELL. AND THOSE AGENCIES ARE OPM, OFFICE OF

 PERSONNEL MANAGEMENT WHICH HELPS TO FOCUS ON

 HIRING AND GETTING PEOPLE IN PLACE, IT ALSO IS

 33

 THE OFFICE OF GOVERNMENT ETHICS, OGE, WHICH IS

 RESPONSIBLE FOR HELPING INCOMING OFFICIALS TO GET

 THROUGH THE ETHICS REVIEW AND GET THROUGH THE

 VETTING TO BE CONFIRMED IN THEIR APPOINTMENTS.

 AND THE FOURTH AGENCY IS GSA, AND I WOULD SAY

 THIS IS THE LEAD FEDERAL AGENCY THAT HELPS WORK

 WITH THE CENTER AND WORK WITH THESE COUNCILS AND

 IS SUPPORTING TRANSITION. THEY ALSO HAVE THE

 ROLE THAT GSA ALWAYS HAS OF SORT OF FINDING

 PLACES AND FINDING THINGS. THEY ARE GSA, HELP

 AGENCY TRANSITION TEAMS FIND SPACE AND AGENCIES,

 MAKE SURE THAT THEY HAVE EQUIPMENT NECESSARY FOR

 TRANSITION SUPPORT. SO IF WE COULD GO TO THE

 NEXT PAGE OR THE NEXT SLIDE, PLEASE.

 SO I WANTED TO HIGHLIGHT AND GO OVER GSA'S ROLE

 AND ANSWER THE QUESTION THAT I JUST POSED TO

 OURSELVES A MINUTE AGO. HOW DO AGENCIES

 TRANSITION TEAMS KNOW THEIR RECORDS MANAGEMENT

 REQUIREMENTS? WELL, GSA HAS PUT TOGETHER A

 TRANSITION DIRECTLY. THIS IS A PICTURE OF A

 SCREENSHOT OF A WEBSITE, SO YOU CAN GO AND LOOK

 AT THE CENTER'S WEB PAGE OR LOOK AT THE GSA

 TRANSITION DIRECTLY. WHEN YOU GET THERE, YOU

 WILL SEE AGAIN A WEALTH OF INFORMATION RELATING

 34

 TO WHAT FEDERAL AGENCIES AND TRANSITION TEAMS

 NEED TO KNOW ABOUT TRANSITION. AND YOU WILL SEE

 THAT I HAVE EXPANDED THEIR LEFT-HAND NAVIGATION

 TO POINT OUT THAT IN THE DIRECTORY THERE ARE

 SPECIFIC RECORDS MANAGEMENT GUIDELINES WHERE WE

 TALK ABOUT FEDERAL RECORDS, PRESIDENTIAL RECORDS

 AND WE HAVE RESOURCES AVAILABLE. SO WE KNOW THAT

 AGENCIES WHO ARE USING THE DIRECTORY AND THE

 COUNCILS AND THE ATD DIRECTORS ARE REFERRED TO

 THIS DIRECTORY AND WE'VE LINKED FROM THE CENTER

 SITE TO THE GSA SITE TO NARA'S SITE TO PROVIDE

 RESOURCES. IF WE COULD GO TO SLIDE 23, PLEASE.

 I WILL TALK ABOUT WHAT THE RESOURCES ARE. AND I

 WANTED -- I'M SORRY, I DID WANT TO SHARE, WE MADE

 THESE RESOURCES AVAILABLE AND WE HAVE AND I AND

 MY TEAM, WE HAVE BOTH BRIEFED THE AGENCY

 TRANSITION DIRECTORS AND WE'VE BEEN WORKING WITH

 THE PARTNERSHIP, SO WE KNOW THAT THE AGENCY

 TRANSITION DIRECTORS AND THOSE CAREER OFFICIALS

 WHO ARE SUPPORTING TRANSITION ARE GETTING THEIR

 AWARENESS OF RECORDS MANAGEMENT REQUIREMENTS AND

 WE KNOW WE HAVE BEEN MAKING THIS AWARENESS

 AVAILABLE FOR AGENCIES AS WELL. WE HAVE HAD ON

 OUR WEB PAGE FOR A LONG TIME A WEB PAGE WE CALL

 35

 DOCUMENTING YOUR PUBLIC SERVICE. WHEN WE FIRST

 DEVELOPED THIS INFORMATION, AND I THINK WE HAVE

 BEEN DOING VERSIONS OF THIS FOR THE PAST

 20 YEARS, WE HAD A GUIDE THAT WE WOULD HAND OUT

 FOR INCOMING OFFICIALS THAT SAID OR MADE IT

 AVAILABLE FOR OTHER AGENCIES TO HAND OUT AS A

 PUBLIC DOCUMENT, DOCUMENTING YOUR PUBLIC SERVICE.

 SO WE'VE ALWAYS LEFT IT ON OUR WEB PAGE. WHAT IS

 HERE IS A SERIES OF RESOURCES TO HELP A RECORDS

 OFFICERS AND FEDERAL RECORDS MANAGEMENT STAFF BE

 PREPARED AND THINK ABOUT THE THINGS THAT THEY

 NEED TO COVER FOR FEDERAL RECORDS MANAGEMENT

 REQUIREMENTS DURING TRANSITION. BECAUSE THERE

 ARE ALWAYS AREAS OF EMPHASIS THAT WE WANT TO

 FOCUS ON.

 I WILL ALSO POINT OUT ON THIS PAGE THAT WE HAVE A

 SHORT, ABOUT A 5 OR 6-MINUTE VIDEO, AND IF I WERE

 TO -- SOMETHING IS HAPPENING WITHIN THE FEDERAL

 GOVERNMENT (LOST AUDIO). EITHER A ONE TERM OR A

 TWO TERM PRESIDENT THAT MAKES HISTORY. WHAT DO

 WE DO WITH THE NATIONAL ARCHIVES?

 SPEAKER: (LOST AUDIO).

 36

 SPEAKER: ACTIVITIES THAT HAPPENING DURING

 TRANSITIONS. I WAS GOING TO SAY, IT TAKES ABOUT

 100 PERCENT OF AGENCY OFFICIALS THAT ARE IMPACTED

 BY A TRANSITION ARE CAP STONE OFFICIALS. BUT

 THERE IS ONE LITTLE EXCEPTION TO THE RULE. SO I

 WILL JUST SAY 99.9 PERCENT OF THE TIME WHEN YOU

 ARE TALKING ABOUT TRANSITION YOU ARE TALKING

 ABOUT CAP STONE (LOST AUDIO). THIS IS

 IMPORTANT-(LOST AUDIO).

 SPEAKER: THE OTHER AREA OF FOCUS FOR US

 SOMETIMES OFFICIALS WHO ARE LEAVING WILL THINK

 THAT I'M GOING TO TAKE A SERIES OF RECORDS WITH

 US, YOU KNOW, I NEED THIS FOR MY FUTURE CAREER,

 AND OF COURSE AS WE ALL KNOW THERE ARE RULES

 ABOUT RECORDKEEPING. YOU CAN'T TAKE RECORDS BUT

 YOU MAY BE ABLE TO TAKE COPIES OF SOME RECORDS IF

 THEY ARE APPROPRIATE FOR RELEASE. SO THERE IS

 OFTEN A REVIEW PERIOD THAT HAS TO HAPPEN THROUGH

 LEGAL AND THROUGH RECORDS TO MAKE SURE THERE IS

 ANY OUTGOING RECORDS BEING TAKEN BY AN OUTGOING

 OFFICIALS ARE EITHER THEIR PERSONAL PAPERS WHICH

 THEY KEPT IN THE GOVERNMENT OFFICES AND SYSTEMS

 OR THEY ARE COPIES OF NONRECORDS THAT ARE

 RELEASABLE UNDER OUR RECORDS AND FOIA RULES. I

 37

 WILL ALSO HIGHLIGHT THE LAST TWO NEW AREAS OF

 FOCUS, WE STARTED TO FOCUS ON THEM IN THE PAST

 TEN YEARS, WHICH IS SOCIAL MEDIA RECORDS AND WEB

 RECORDS. I WANT TO POINT OUT THAT, YOU KNOW,

 MANY SOCIAL MEDIA ACCOUNTS ARE CONSIDERED TO BE

 FEDERAL RECORDS, ESPECIALLY -- THEY MAY BE COPIES

 OR THEIR SOCIAL MEDIA ACCOUNTS ARE USED TO

 AMPLIFY OTHER RECORDS MANAGEMENT OR OTHER

 BRIEFING INFORMATION. AND WE WANT TO POINT OUT

 THAT SOCIAL MEDIA ACCOUNTS GENERALLY USED BY

 AGENCIES STAY WITH THE AGENCY. SO OUTGOING

 OFFICIALS LOSE THEIR FOLLOWERS WHEN THEY HAVE TO

 GO BACK TO SETTING UP A NEW, YOU KNOW, TWITTER

 ACCOUNT OR RUNNING A NEW BLOG RELATED TO THEIR

 WORK ONCE THEY LEAVE FEDERAL SERVICE. AND I WILL

 ALSO HIGHLIGHT THAT WEB RECORDS IS AN AREA THAT

 WE'RE STARTING TO PAY MORE ATTENTION TO WHEN IT

 COMES TO TRANSITIONS. BECAUSE OFTEN WHEN THERE

 IS A TRANSITION OF AN ADMINISTRATION AND NEW

 OFFICIALS COME IN, THERE IS A NEW EMPHASIS ON THE

 WEB PAGE, SOMETHING THAT REFLECTS A NEW

 ORGANIZATION OR A NEW FOCUS OR THE NEW TERM. AND

 I WANT TO HIGHLIGHT THAT IF WEB RECORDS ARE

 SCHEDULED THEY NEED TO BE MANAGED AND MAINTAINED

 AS ACCORDING TO RECORDS SCHEDULES WHICH OFTEN

 38

 COULD MEAN RELEASING INFORMATION AS WEB RECORDS

 ARE SCHEDULED THEY NEED TO BE MANAGED AND

 MAINTAINED AS ACCORDING TO RECORD SCHEDULES WHICH

 OFTEN COULD MEAN REPLACING INFORMATION AS IT IS

 NEEDED BUT THEN KNOWING THAT AS AN AGENCY YOU

 KNOW WHAT YOU HAD ON THE WEBSITE RECENTLY AND

 MAKING SURE YOU HAVE GOT WEB CONTENT IN PLACE SO

 YOU KNOW WHAT WAS SAID IN THE PAST AS WELL AS

 WHAT YOU ARE SAYING CURRENTLY. I WILL MENTION,

 THESE FOUR AREAS ARE SOMETHING THAT WE'RE

 FOCUSING ON AND I WOULD LIKE TO HIGHLIGHT OUR

 RECORDS EXPRESS BLOG. IN OUR RECORDS EXPRESS

 BLOG WE'RE DOING A SERIES OF BLOG POSTS TO GO

 INTO THE FOUR AREAS A LITTLE MORE. TWO OF THEM

 HAVE BEEN SENT OUT, TWO MORE MAY BE COMING OVER

 THE NEXT WEEK OR TWO, AS FAST AS WE CAN GET THEM

 WRITTEN AND GET THEM OUT. IF YOU ARE LOOKING FOR

 RESOURCES, YOU NOT ONLY HAVE THE CENTERS PAGE,

 THE TRANSITION DIRECTORY PAGE FROM GSA, NARA'S

 DOCUMENTATION PAGE BUT THE RECORDS EXPRESS BLOG

 IS WRITTEN IN A WAY TO FOCUS ON THESE AREAS AND

 PROVIDE MORE CONTEXT FOR YOU.

 SO WITH THAT, I WILL CLOSE ON MY FINAL SLIDE.

 BECAUSE THIS IS WHERE I WILL SAY, FOR THOSE OF

 39

 YOU WHO SAID YEAH, YEAH, YEAH, I'VE TUNED OUT A

 LITTLE BIT BECAUSE I DON'T NEED TO PAY TOO MUCH

 ATTENTION TO TRANSITION UNTIL THERE IS AN

 ELECTION RESULT AND THEN WE WILL FIGURE OUT WHAT

 WE REALLY HAVE TO FOCUS ON. I WANTED TO SHARE

 THIS SLIDE WHICH COMES FROM THE PARTNERSHIP FOR

 PUBLIC SERVICE, FROM THE CENTER. ONE OF THE

 RESOURCES THEY MADE AVAILABLE WAS DATA ON TURN

 OVER RATES FOR WHEN A PRESIDENT GOES INTO A TWO

 TERM, A SECOND TERM. AND HERE YOU CAN SEE THE

 DATA FOR CLINTON, BUSH AND OBAMA, AND ONCE THERE

 WAS AN ELECTION, THEY DIVIDED IT UP OVER A

 NINE-YEAR PERIOD, HOW MANY CABINET OFFICIALS

 RESIGNED AND TRANSITIONED BETWEEN ELECTION AND

 INAUGURATION DAYS, HOW MANY LEFT BETWEEN

 INAUGURATION IN THE FIRST THREE MONTHS AND THEN

 AGAIN HOW MUCH TURN OVER THERE WAS BETWEEN THE 3

 TO 6-MONTH TERM. SO I WOULD LIKE TO SAY THAT

 RECORDS MANAGEMENT NEVER SLEEPS, NEVER STOPS. WE

 ARE WORKING TO MAKE SURE THAT WE'RE PREPARED TO

 SAVE AND PRESERVE PERMANENT RECORDS CREATED BY

 SENIOR EXECUTIVES OR MAKING SURE THEY KNOW THEIR

 RESPONSIBILITIES AS THEY TRANSITION IN OR OUT OF

 A POSITION. AND REGARDLESS OF WHO WINS THE

 ELECTION, THERE IS GOING TO BE TURN OVER AND

 40

 THERE IS GOING TO BE TRANSITION. SO I HOPE THESE

 RESOURCES WILL BE AVAILABLE AND HELP YOU AS YOU

 ARE THINKING THROUGH THE WAYS TO PREPARE OR

 PERHAPS HAVE ALREADY BEEN PREPARING AND ARE

 FAMILIAR WITH OUR WORK HERE. SO WITH THAT, I

 WILL ASK IF THERE ARE ANY OTHER QUESTIONS RELATED

 TO TRANSITION. ANYTHING I CAN HELP WITH?

 SPEAKER: SURE. THANK YOU, LISA. WE HAVE AT

 LEAST ONE QUESTION. MY AGENCY CURRENTLY DOES NOT

 HAVE AN AGENCY RECORDS OFFICER. HOW CAN OUR

 RECORDS MANAGEMENT OFFICE KNOW THE PROCESS FOR

 HELPING OUR POLITICAL APPOINTEES GET THEIR

 RECORDS HANDLED BEFORE DEPARTURE? WILL NARA GIVE

 US ASSISTANCE SINCE WE ARE SHORT STAFFED?

 SPEAKER: WELL, FOR ASSISTANCE WE WILL DO WHAT WE

 CAN. CAN YOU SEND AN E-MAIL TO ME DIRECTLY OR I

 WILL FOLLOW-UP FROM THE RECORDS COMMUNICATIONS

 E-MAIL IF YOU ASKED IT THAT WAY, BECAUSE WE HAVE

 TO FIND OUT WHO IS ACTING AS RECORDS OFFICER AND

 I CAN SEE IF WE CAN MAKE CONNECTIONS TO THE

 TRANSITION TEAM THAT IS IN PLACE AT YOUR

 COMPONENT. AND MAYBE WE CAN MAKE THE RIGHT

 CONNECTIONS AND MAKE SURE THAT THE INFORMATION,

 41

 DEBRIEFINGS ARE GETTING TO THE RIGHT PERSON AT

 THE RIGHT PLACE. THAT IS A GREAT QUESTION BUT

 ONE THAT I DON'T HAVE A GENERAL ANSWER FOR.

 SPEAKER: AND I KNOW WE ALWAYS HAVE A LITTLE BIT

 OF A LAG, SO I WILL LET THE DOG OUT OF THE OFFICE

 WHILE WE ARE THINKING IF THERE ARE ANY OTHER

 QUESTIONS. THAT IS HOW YOU KNOW THIS EVENT IS

 LIVE AND DURING COVID.

 SPEAKER: THANK YOU. I'M SURE HE APPRECIATED

 THAT. AT THIS POINT, WE HAVE NO FURTHER

 QUESTIONS.

 SPEAKER: ALL RIGHT. WELL, THEN, THANK YOU. I

 KNOW IF YOU HAVE ANY OTHER SPECIFIC ISSUES OR

 QUESTIONS ABOUT TRANSITION AND YOU DON'T FIND AN

 ANSWER IN ANY OF SHOWS RESOURCES, FEEL FREE TO

 REACH OUT TO OUR OFFICE AND WE WILL BE HAPPY TO

 HELP YOU IN ANY WAY WE CAN

 SPEAKER: THANK YOU. NOW PLEASE WELCOME OUR

 ARCHIVES SPECIALIST WHO WILL DISCUSS THE

 COGNITIVE TECHNOLOGIES WHITE PAPER THAT WE POSTED

 YESTERDAY ON RECORDS EXPRESS

 42

 SPEAKER: THANK YOU. I WANTED TO TAKE A COUPLE

 OF MINUTES THIS MORNING TO TALK ABOUT A COGNITIVE

 TECHNOLOGIES WHITE PAPER THAT WENT UP YESTERDAY.

 THE NEXT SLIDE, PLEASE.

 THIS PAPER COVERS THESE FOUR TECHNOLOGIES. AND

 FOR PURPOSES OF THIS PAPER, WE COLLECTIVELY REFER

 TO THE FOUR TECHNOLOGIES AS COGNITIVE

 TECHNOLOGIES. WE COVERED NOT ONLY THE

 DEFINITIONS OF THE TECHNOLOGY BUT ALSO SOME OF

 THE SUPPORTING INFRASTRUCTURE THAT THESE

 TECHNOLOGIES RELY ON AND WE TAKE A LOOK AT SOME

 OF THE CULTURAL AND SOCIETY IMPLICATIONS WITH THE

 FOCUS ON BIAS WITHIN THE ARTIFICIAL INTELLIGENCE

 FIELD.

 THE AUDIENCE FOR THE WHITE PAPER INCLUDES,

 RECORDS MANAGERS, ARCHIVAL FOLKS, AND FOLKS

 INTERESTED IN NEW TECHNOLOGY AND RECORDS.

 THE FIRST ONE FOCUSES ON POLICIES AND STANDARDS

 AND WHAT THE IMPLICATIONS FOR THIS TECHNOLOGY IS

 FOR APPRAISAL, SCHEDULING AND TRANSFER. THE NEXT

 43

 SLIDE, PLEASE.

 HERE IS A QUICK SNAPSHOT OF THE DEFINITIONS TO

 PERHAPS ENTICE YOU TO READ THE PAPER. IOT IS ANY

 DEVICE THAT HAS A MICRO PROCESSOR AND CAN

 COMMUNICATE WIRELESSLY. WE HAVE ARTIFICIAL

 INTELLIGENCE THAT IS AN UMBRELLA TERM THAT

 INCLUDES TECHNOLOGIES THAT MAKE A SYSTEM BEHAVE

 LIKE A HUMAN. THE NEXT SLIDE, PLEASE.

 SO YOU CAN FIND THE WHITE PAPER HERE. THE PAPER

 WAS WRITTEN BY SHARMELA AND MYSELF AND KARL WHO

 IS AT THE NATIONAL SCIENCE FOUNDATION. AND IN

 THIS SAME SECTION OF THE WEBSITE, THERE IS ALSO A

 WHITE PAPER ABOUT THE RECORDS MANAGEMENT

 IMPLICATIONS OF BLOCK CHAIN IN CASE YOU ARE

 INTERESTED IN THAT, ALSO.

 SO THAT IS REALLY THE QUICK SNAPSHOT OF WHAT WE

 HAD. ARE THERE ANY QUESTIONS?

 SPEAKER: THANK YOU, WE HAVE NOT YET RECEIVED ANY

 QUESTIONS FROM THE AUDIENCE. BUT IF YOU HAVE,

 AGAIN, IF YOU HAVE THEM, PLEASE LEAVE THEM IN THE

 CHAT OR YOU CAN E-MAIL THEM TO ARAN DOT

 44

 COMMUNICATIONS AT NARA.GOV.

 SO AT THIS POINT, WE WILL JUST MOVE ON TO OUR

 GENERAL Q AND A SESSIONS WITH ALL OF THE

 PRESENTERS FROM TODAY'S PROGRAM. WE DO HAVE A

 FEW QUESTIONS THAT HAVE COME IN AND WE MAKE SURE

 AND CIRCLE AROUND AND GET TO THEM NOW.

 I WOULD LIKE TO START WITH GORED AND, PLEASE. WE

 HAVE A COUPLE OF QUESTIONS ABOUT THE FRC AND THE

 FRC RATES.

 SPEAKER: OKAY.

 SPEAKER: THE FIRST: WHERE CAN WE GET A COPY OF

 THE NOTICE ABOUT FRC CHANGES THAT WAS SENT OUT IN

 SEPTEMBER?

 SPEAKER: THAT WAS SENT TO RECORDS OFFICERS WITH

 THEIR INTERAGENCY AGREEMENT PACKAGES. I WANT TO

 SAY SEPTEMBER 29TH. BUT THEY CAN REACH OUT TO

 THEIR ACCOUNT MANAGER AND IF THEY FOR SOME REASON

 DIDN'T RECEIVE IT, LOST IN THE MAIL, IF THEY WILL

 REACH OUT TO THEIR ACCOUNT MANAGER WE WILL GET IT

 RE-SENT TO THEM.

 45

 SPEAKER: OKAY. THANK YOU. WE HAVE ANOTHER

 QUESTION. IF AND/OR IF WHEN NARA'S FOUR PERCENT

 IS EXCEEDED HOW OR DOES NARA RETURN THE EXCESS TO

 AGENCIES?

 SPEAKER: SO I WILL HANDLE THAT ONE, GORDON. SO

 THE ENABLING LEGISLATION ACTUALLY REQUIRES US, IF

 WE DO EXCEED THAT FOUR PERCENT REVENUE OVER

 EXPENSES, WE ARE REQUIRED TO RETURN ANY EXCESS TO

 THE TREASURY, SORT OF THE UNITED STATES TREASURY,

 NOT THE TREASURY DEPARTMENT, BUT THE BIG POT OF

 MONEY IN THE SKY WHICH SERVES TO OFFSET THE

 NATIONAL DEBT, WHICH I THINK IS IN THE 28 OR

 $25 TRILLION RANGE. IT HAS BEEN A WHILE SINCE I

 CHECKED. SO IF WE GO OVER FOUR PERCENT,

 4 PERCENT RIGHT NOW IS ABOUT $8 MILLION, SO IF WE

 HIT FIVE PERCENT THAT MEANS WE HAVE AN EXTRA HALF

 $1 MILLION, WE'RE REQUIRED TO SEND IT TO OFFSET

 THE NATIONAL DEBT. IT VANISHES INTO THIN AIR,

 UNFORTUNATELY. BUT THERE IS NOT A PROCESS THAT

 WE DIVVY UP THE MONEY AND SEND IT BACK TO

 CUSTOMERS.

 SPEAKER: OKAY. THANK YOU BOTH. I THINK WE WILL

 46

 MOVE TO LAWRENCE AND QUESTIONS AROUND THE NARA

 BULLETINS. THE FIRST ONE IS: MUST THE EXCEPTION

 REQUESTS COME FROM THE DEPARTMENT LEVEL AS AN ORM

 OR FROM A BUREAU'S AOR?

 SPEAKER: THAT IS A GOOD QUESTION. WE'VE SPENT A

 LOT OF TIME THINKING ABOUT THE PROCESS AND HOW IT

 SHOULD WORK. ONE OF THE THINGS THAT WE'RE TRYING

 TO DO WITH THE BULLETIN IS MAKING THE CONNECTION

 TIGHTER WITH THE RECORDS OFFICER AND THE LIAISON.

 WE FEEL IT IS APPROPRIATE FOR EXCEPTION REQUESTS

 TO COME FROM THE SENIOR AGENCY OFFICIAL FOR

 RECORDS MANAGEMENT BECAUSE IT RELATES TO VERY

 IMPORTANT STRATEGIC INITIATIVES AND REQUIREMENTS

 THAT AGENCIES ARE WORKING ON TO TRANSITION TO

 FULLY ELECTRONIC. BUREAUCRATICALLY THIS PRESENTS

 ADDITIONAL CHALLENGES AND THIS IS AN AREA WHERE I

 THINK IF YOU DO SPEND THE TIME AT THE OPERATIONAL

 LEVEL WITHIN THE RECORDS MANAGEMENT PROGRAM,

 PULLING TOGETHER THAT COMPREHENSIVE REQUESTS,

 SENDING IT FOR REVIEW, AND SIGN OFF, THAT SHOULD

 HOPEFULLY STREAMLINE THINGS ON YOUR END. AT THIS

 POINT, WE PUT IT IN THE BULLETIN THAT WAY BECAUSE

 WE WANT TO MAKE SURE THE DISCUSSIONS ARE ELEVATED

 WITHIN AGENCIES BECAUSE THEY ARE MOST CERTAINLY

 47

 GOING TO BE ELEVATED WITHIN OUR AGENCY AND WITH

 OMB. SO WE WANTED TO MAKE SURE THE CONNECTION IS

 LEVEL AND PARALLEL.

 SPEAKER: OKAY. THANK YOU. ANOTHER QUESTION

 THAT HAD COME IN. DOES THE EXCEPTION PROCESS

 SHOWN ON YOUR SLIDES APPLY FOR AGENCIES SEEKING

 AN EXCEPTION FOR CLOSING THEIR FEDERAL AGENCY'

 RECORD STORAGE FACILITY

 THE SHORT ANSWER IS YES. THE GUIDANCE THAT WE

 ISSUED SHOULD COVER AND IS EXPECTED TO COVER ANY

 TYPE OF EXCEPTION TO M 1921 THAT AGENCIES WOULD

 BE REQUESTING. THERE ARE REQUIREMENTS,

 OBVIOUSLY, THAT RELATE TO RECORDS STORAGE, AGENCY

 OPERATED RECORDS CENTERS AND A NUMBER OF OTHER

 THINGS. SO THE PROCESS SHOULD WORK THE SAME WAY

 AND IT SHOULD COVER THOSE ISSUES AS WELL AS OTHER

 ISSUES RELATED TO DIGITALIZATION OF ANALOG AND SO

 ON. SO THE SHORT ANSWER, YES.

 SPEAKER: SO THANK YOU. AND I THINK THESE ARE

 PAIRED QUESTIONS. SO DOES THE DECEMBER 31ST,

 2022, DEADLINE FOR NARA NO LONGER ACCEPTING

 TEMPORARY RECORDS ALSO REFER TO RECORDS THAT

 PERTAIN TO OTHER CENTERS, IF NOT, ARE THERE

 48

 SIMILAR DIGITAL MODERNIZATION EFFORTS IN THE NEAR

 FUTURE?

 SPEAKER: SO THAT IS A GOOD QUESTION AND I AM NOT

 SURE HOW WE ARE WORKING INTERNALLY AND WITH

 AGENCIES AROUND THOSE RECORDS. I THINK THERE IS

 CERTAINLY SOME VERY SPECIFIC COMPLEX ISSUES

 AROUND PERSONNEL RECORDS THAT WE WILL WORK

 THROUGH. SO WE MAY NEED TO ISSUE FURTHER

 GUIDANCE OR HAVE DISCUSSION ABOUT THOSE RECORDS

 AS WELL.

 SPEAKER: I GUESS THIS IS A, IT SOUNDS LIKE A

 RELATED -- WELL, HERE IS ANOTHER QUESTION: WHAT

 ARE THE PLANS FOR ACCEPTING DIRECT OFFERS AFTER

 THE 2022 DEADLINE IN PAPER FROM AN AGENCY THAT

 HAS ALREADY HOUSED THEM AT THE FRC?

 SPEAKER: SO IF THIS IS -- SO OBVIOUSLY IF

 RECORDS ARE IN THE FRC SYSTEM, AND THEY ARE

 PERMANENT, THEY WOULD COME TO US THROUGH THE

 ANNUAL MOVE, THROUGH NORMAL PROCESSES AND IF THEY

 ARE IN OUR CUSTODY THERE IS NO IMPACT. IF THEY

 ARE OUTSIDE OUR PHYSICAL CUSTODY AND WITHIN AN

 AGENCY AND LEGAL TRANSFER IS BEING MADE OUTSIDE

 49

 OF THE NORMAL PROCESS FOR AN ANNUAL MOVE, THEN

 THAT WOULD BE AFFECTED BY M 1921 AND AN EXCEPTION

 WOULD BE NEEDED.

 SPEAKER: OKAY. THANK YOU. LISA, THIS IS

 ANOTHER QUESTION THAT HAS COME IN THAT IS PUTTING

 ON YOUR OTHER HAT, I GUESS. WHEN DOES NARA

 ANTICIPATE RELEASING THE FINAL DIGITALIZATION

 STANDARDS?

 SPEAKER: THANK YOU FOR ASKING. I WAS WONDERING.

 I PROBABLY SHOULD HAVE BROUGHT THAT UP IN THE

 BEGINNING AND ASKED MYSELF THAT QUESTION. OUR

 CURRENT STATUS WITH THE DIGITALIZATION STANDARDS

 IN REGULATION FOR PERMANENT RECORDS IS THAT WE

 SENT IT BACK TO OMB LAST WEEK, SO OMB HAS HAD IT

 FOR ONE WEEK, WE ARE WAITING TO SEE WHETHER OMB

 WOULD LIKE US TO DO A THIRD ROUND OF AGENCY

 COMMENT OR IF THEY WILL APPROVE US MOVING FORWARD

 AND POSTING THOSE REGULATIONS ON THE FEDERAL

 REGISTER FOR PUBLIC COMMENT. SO I CAN'T QUITE

 ANSWER THE WHEN BECAUSE THERE IS STILL THAT KEY

 DECISION. BUT ONCE WE GET THOSE REGULATIONS

 POSTED ON THE FEDERAL REGISTER, YOU WILL KNOW TWO

 THINGS, ONE WE'VE BEGUN THE 45-DAY COMMENT PERIOD

 50

 AND, TWO, THERE WILL BE A CHANCE TO SORT OF SEE

 PUBLICALLY FOR THE FIRST TIME FIRST DIRECTION

 WE'VE BEEN GOING AND TALKING ABOUT THOSE

 DIGITALIZATION REGULATIONS. SO NOT KNOWING THE

 ANSWER TO THE FIRST QUESTION, NOT KNOWING HOW

 LONG IT WILL TAKE FOR THE REGULATIONS TO GET

 POSTED IN THE FEDERAL REGISTER, BECAUSE YOU MAY

 BE AWARE, THOSE OF YOU WHO COME FROM THE

 REGULATIONS WORLD, IF THERE IS A TRANSITION OF

 ADMINISTRATION, IF A NEW -- IF IT IS A ONE TERM

 PRESIDENT AND NOT A TWO TERM PRESIDENT, THERE IS

 TRADITIONALLY A HOLD PUT ON REGULATIONS UNTIL THE

 NEW ADMINISTRATION TAKES PLACE. SO MY ANSWER TO

 THE QUESTION, WHEN DO YOU ANTICIPATE FINAL, WOULD

 BE, FIRST, A SECOND QUARTER FY 21. SO I'M

 THINKING WE WOULD HOPEFULLY GET THEM POSTED, GET

 COMMENTS OUT AND THEN BETWEEN JANUARY AND

 MARCH BE ABLE TO RESOLVE THE COMMENTS AND GET A

 FINAL. I HOPE IT WILL BE FASTER IF WE CAN MOVE

 FASTER. IF WE DON'T, THEN THAT IS THE TIME.

 THANK YOU FOR ASKING AND LETTING ME EXPLAIN AGAIN

 OUR PROCESS AND THE STEPS.

 SPEAKER: OKAY. THANK YOU, LISA. I WILL DIRECT

 THIS ONE TO GORDON AND JEFF. THE FY 21 COST

 51

 STRUCTURE REPRESENTED A 38 PERCENT INCREASE FOR

 OUR AGENCY, 52 PERCENT INCREASE FOR ONE CENTER.

 DID NARA CONSIDER GOING TO CONGRESS TO EXPLAIN

 THE COVID IMPACTS AND ASK FOR RELIEF, FORGIVENESS

 OF THE SHORTFALL RATHER THAN SPRINGING ON

 AGENCIES SUCH AN OVERNIGHT COST INCREASE IN A

 YEAR FOR WHICH WE SUBMITTED A BUDGET OVER A YEAR

 AGO?

 SPEAKER: THANK YOU FOR THAT QUESTION. THERE IS

 -- THERE WAS A REQUEST THAT WENT TO CONGRESS FOR

 RELIEF FOR THE RECORDS CENTER PROGRAM. IT WAS

 NOT ACTED ON. I DON'T KNOW IF IT IS STILL BEING

 CONSIDERED. THE IMPACT OF COVID ON OUR REVENUE

 IS BASICALLY CUT OUR REVENUE IN HALF AND DID NOT

 CUT ANY OF OUR EXPENSES AT ALL. SO WE STRUGGLED

 WITH THAT INTERNALLY AND IN DEVELOPING THE RATE

 STRUCTURE WE DID TAKE A LOOK AT THE IMPACT OF OUR

 FY 21 ESTIMATES FOR EACH OF OUR CUSTOMERS. AND

 WE MADE AN ATTEMPT TO BALANCE THAT, UNDERSTANDING

 THAT SOME CUSTOMERS INVOICES WOULD GO DOWN AND

 SOME WOULD GO UP. IT WAS A CHALLENGE BECAUSE WE

 DON'T LIKE THE IDEA OF BRINGING THAT KIND OF

 MAJOR FINANCIAL CHANGE ON ANYBODY. AND IT IS

 DISHEARTENING TO HEAR THAT YOUR AGENCY WAS

 52

 IMPACTED THAT MUCH. WHAT I CAN OFFER TO YOU IS

 TO PLEASE CONTACT YOUR CUSTOMER SERVICE

 REPRESENTATIVE ON GORDON'S TEAM, AND I DON'T KNOW

 WHAT WE CAN DO BUT I KNOW WE HAVE HAD SOME

 CONVERSATIONS WITH OTHER CUSTOMERS WHO ARE

 EXPRESSING THE SAME PROBLEM. SO WE'RE WORKING

 OFF LINE ON INDIVIDUAL CASES. IN THE VERY LEAST,

 IF WHAT NEEDS TO HAPPEN IS A SUPPLEMENTAL BUDGET

 REQUEST TO OMB AND CONGRESS, WE CAN CERTAINLY

 PROVIDE THE DATA AND SUPPORT YOU WOULD NEED TO

 JUSTIFY THAT REQUEST. BUT I WOULD ENCOURAGE YOU

 TO GO THROUGH THE FIRST STEP I MENTIONED TO SEE

 IF THERE IS ANYTHING WE CAN DO INTERNALLY.

 SPEAKER: THANK YOU. I'M WAITING TO SEE IF ANY

 MORE QUESTIONS SHOW UP. THERE IS ONE THAT HAS

 COME IN AROUND ANNUAL REPORTING. WHAT OR WHEN

 WAS THE OPENING DATE AND THE CLOSING DATE FOR THE

 2020 ANNUAL REPORTING?

 SPEAKER: SO IT IS INTERESTING. I'M GOING TO

 ANSWER THAT QUESTION AS BEST I CAN. BECAUSE IT

 SAYS WHEN WAS THE 2020 REPORTING. AS YOU KNOW,

 WE'RE SORT OF -- WE DO OUR DATA CALL AND THEN WE

 LOOK BACK. SO FOR THE YEAR 2020, WHEN WE DO OUR

 53

 ANNUAL REPORTING, WE WILL RELEASE THAT REPORT AND

 WE'RE STILL PLANNING ON RUNNING THAT REPORT FROM

 JANUARY TO -- MID JANUARY TO MID MARCH. SO WE

 EXPECT TO HAVE THE REPORTING WINDOW OPEN THE WAY

 WE TRADITIONALLY HAVE. IF YOU ARE ASKING WHAT

 DID WE DO FOR THE 2019 REPORT IN 2020, WE OPENED

 THE REPORTING PERIOD MID JANUARY AND THEN DUE TO

 COVID WE GAVE TWO EXTENSIONS, SO IT WENT THROUGH

 -- IT DIDN'T CLOSE UNTIL MAY. SO I HOPE THAT

 ANSWERS BOTH QUESTIONS. AND I THINK YOU ARE

 REQUESTING ABOUT, I WILL REFRAME IT, WILL THERE

 BE A DELAY FOR THE RMSA REPORTING PERIOD DUE TO

 COVID IN 2020, WE ARE STILL PLANNING TO HAVE OUR

 REGULAR REPORTING CYCLE WITH THE RMSA, ET CETERA

 AND THE E-MAIL AND ELECTRONIC PERMANENT RECORDS

 REPORT OUT IN JANUARY. AND I HOPE WE WILL BE

 ABLE TO TALK ABOUT WHAT IS COMING A LITTLE BIT

 MORE AT OUR DECEMBER BRIDG. SO STAY TUNED,

 FOLLOW THE BLOG, FOLLOW THE AC MEMOS THAT WE HAVE

 SENT OUT AND WE WILL PROVIDE MORE INFORMATION

 SOON. THANK YOU.

 SPEAKER: WE THEN CIRCLE BACK TO M ARCUS. HOW

 ABOUT: WHAT IS ONE OF THE INTERESTING FACTS THAT

 YOU LEARNED AS PART OF THE RESEARCH INTO

 54

 COGNITIVE TECHNOLOGIES?

 SPEAKER: THANK YOU. YEAH, I THINK THE FACT THAT

 MY REFRIGERATOR TALKS TO MY PHONE GOT ME THINKING

 THAT THERE WERE GOING TO BE SOME RECORDS

 MANAGEMENT IMPLICATIONS FOR FEDERAL AGENCIES

 AROUND THIS. AND I THINK WHAT BLEW ME AWAY WAS

 JUST THE VOLUME OF CONNECTED DEVICES AND THE

 VOLUME OF DATA THAT IS BEING GENERATED. YOU

 KNOW, THERE IS AN ESTIMATE THAT THERE WILL BE 75

 BILLION DEVICES CONNECTED TO THE INTERNET IN JUST

 FOUR YEARS AND THAT, FOR EXAMPLE, SOME AIRPLANE

 ENGINE MANUFACTURERS NOW TRACK SOMETHING LIKE 70

 TRILLION DATA POINTS PER YEAR FOR THEIR ENGINES.

 AND THAT KIND OF VOLUME WAS JUST KIND OF A -- IT

 IS JUST A DIFFERENT SCOPE THAN I'VE KIND OF

 TRADITIONALLY THOUGHT ABOUT RECORDS MANAGEMENT.

 SO THAT WAS ONE OF THE NEAT THINGS THAT REALLY

 CAME OUT FOR ME. THANKS.

 SPEAKER: OKAY. AND I WILL POINT OUT THAT WE

 HAVE GOT A FAN ALREADY ON THE YOUTUBE THAT WILL

 READ THE PAPER, SO THANK YOU.

 SPEAKER: THAT IS GREAT.

 55

 SPEAKER: THIS IS A PROBABLY AN LISA QUESTION.

 IN LIGHT OF COVID-19 PANDEMIC, RELATIVE TO THE

 AGENCY CONTINUITY AND THEREFORE ESSENTIAL RECORDS

 MANAGEMENT, DOES NARA PLAN A REVISED 2020 ANNUAL

 REPORTING?

 SPEAKER: NO

 SPEAKER: BEING EXPANDED OR NEW RMSA, OR

 SOMETHING SIMILAR TO THE E REPORTS REPORT

 SPEAKER: THANK YOU FOR THE QUESTION. I WILL

 ADMIT THAT I WAS CHATTING WITH OUR DIRECTOR FOR

 OVER SIGHT REPORTING. AND IN LIGHT OF COVID AND

 AGAIN THAT IS KIND OF WHAT I WONDERED IF THE

 EARLIER QUESTION WAS REFERRING TO AS WELL, FOR

 THE 2020 RMSA IN THE NONSCORED QUESTIONS WE WERE

 PLANNING TO ASK SOME QUESTIONS RELATED TO COVID

 AND RECORDS MANAGEMENT. AGAIN, THE RMSA IS AN

 IMPORTANT PART OF FEEDBACK FOR FEDERAL RECORDS

 MANAGEMENT BECAUSE IT IS THE DATA THAT WE LEARN

 IN THESE REPORTS THAT HELP US TO MAKE

 DETERMINATIONS ON WHAT NEW TRAINING IS NEEDED,

 NEW POLICIES ARE NEEDED. SO, YES, WE ARE

 56

 PLANNING TO INCLUDE SOME COVID QUESTIONS IN THE

 NONSCORED PART. WE ALSO WILL PROBABLY BE ASKING

 ABOUT COVID IMPACT TO AGENCY'S STRATEGIC PLANS

 FOR RECORDS MANAGEMENT. WE KNOW IN SOME AREAS

 FOR ANALOG AND DIGITALIZATION, IF YOU ARE NOT

 PHYSICALLY PRESENT THAT HAS HAD A HARMFUL EFFECT

 ON WHAT AGENCIES ARE ABLE TO DO WITH RECORDS

 MANAGEMENT. ON THE OTHER HAND FOR AGENCIES THAT

 HAVE BEEN TRYING TO TRANSITION TO ELECTRONIC

 RECORDS, THE PANDEMIC ENDED UP BEING A SPUR AND

 SOME PLANS WERE PUT IN PLACE TO MOVE TO

 ELECTRONIC FASTER THAN AGENCIES HAD. SO WE SORT

 OF WERE GOING TO USE THE 2020 REPORTING PERIOD TO

 LEARN ABOUT THE STORIES AND LEARN ABOUT THE

 IMPACT OF COVID. WE DO PLAN ON DOING THAT AND WE

 HAVE THE SAME REPORTING PERIOD. SO WE WILL BE

 ASKING FROM JANUARY -- MID JANUARY TO MID MARCH.

 AND I ALSO WANT TO SHARE, FOR THOSE OF YOU

 INTERESTED, I NEGLECTED TO MENTION THAT WE DID

 JUST RELEASE THE FY -- THE 2019 ANNUAL REPORT,

 OUR FEDERAL AGENCIES RECORDS MANAGEMENT REPORT

 WAS PUT ON LINE AND I BELIEVE THAT WAS JUST TWO

 WEEKS AGO. SO YOU WILL BE ABLE TO READ WHAT WE

 LEARNED LAST YEAR AND THAT WILL ALSO HELP TO

 INFORM THE QUESTIONS THAT WE WILL BE ASKING THIS

 57

 UPCOMING YEAR. SO, AGAIN, IF YOU HAVE ANY

 QUESTIONS ABOUT REPORTING THAT I WAS NOT ABLE TO

 ANSWER, YOU HAD SOMETHING MORE SPECIFIC, PLEASE

 SEND THEM TO ME AND I WILL GET THE RIGHT PEOPLE

 TO SEND YOU THE RIGHT ANSWER. THANK YOU.

 SPEAKER: OKAY. THANK YOU, LISA. SORRY FOR

 JUMPING AROUND BUT WE HAVE AN ACTIVE, VIBRANT

 COMMUNITY ON CHAT TODAY.

 THIS IS A QUESTION FOR GORDON AND THE FRC FOLKS.

 AS A SEPARATE CHARGE OR BAKED INTO A BUNDLED FEE

 ONCE THE PANDEMIC ENDS, (INAUDIBLE)?

 SPEAKER: LET ME MAKE SURE IT CAME OFF OF MUTE.

 THE COVID CHARGE WAS THROUGH SEPTEMBER 30TH. WE

 HAVE NOW, AS OF OCTOBER 1ST, ALL OF THE RATES FOR

 2021 ARE OUT OR HAVE BEEN DISTRIBUTED TO

 CUSTOMERS. SO THERE IS NO COVID SURCHARGE BAKED

 IN. THESE ARE THE RATES FOR 2021, FOR FISCAL

 2021 RIGHT NOW.

 SPEAKER: I HOPE I ANSWERED THAT PRETTY CLEARLY.

 BUT THE SURCHARGE ENDED ON SEPTEMBER 30TH AND NOW

 ON OCTOBER 1ST YOU HAVE NEW RATES WHICH ARE FOR

 58

 -- AND OUR NEW STRUCTURE FOR FISCAL 2021.

 SPEAKER: OKAY. THANK YOU. I THINK THAT IS -- I

 HAVE A QUESTION ON TECHNOLOGY. WHAT EXAMPLES OF

 RECORDS MANAGEMENT PROCESSES DOES NARA SEE AS

 BEING APPLICABLE TO ROBOTIC PROCESS AUTOMATION?

 SPEAKER: WOW. SO A LOT OF WHAT WE TEASED OUT,

 THERE IS A PRETTY GOOD RECORDS MANAGEMENT PROCESS

 THAT AGENCIES CAN FALL BACK ON. AS THEY ARE

 THINKING ABOUT WHAT TO DO WITH, YOU KNOW, THE

 VOLUME OF DATA AND KIND OF HOW IT IMPACTS THEIR

 BUSINESS PROCESSES. I AM NOT SURE SPECIFICALLY

 ABOUT RPA AND THE CONNECTION WITH THE RECORDS

 MANAGEMENT SYSTEMS

 SPEAKER: THIS IS LISA. AS SOMEONE THAT READ THE

 PAPER AND HAD THE WONDERFUL OPPORTUNITY TO EDIT,

 I AM NOT THE RESEARCHER. BUT I WOULD LIKE TO

 ANSWER THE QUESTION THAT RPA, ROBOTIC PROCESSING

 AUTOMATION REFERS TO SOFTWARE. SO IT IS WHAT

 SOFTWARE TOOLS CAN BE PUT IN PLACE TO HANDLE

 ADMINISTRATIVE OR SUPPORT THE HUMANS WHO ARE

 DOING THE WORK OF TRYING TO MANAGE RECORDS

 MANAGEMENT. SO WE DIDN'T FIND TOO MANY CASES OR

 59

 EXAMPLES OF RPA'S BEING USED IN AGENCIES FOR

 RECORDS MANAGEMENT. BUT WE THINK THAT WE SAW

 SOME CASES OF RPA BEING USED FOR BROADER

 INFORMATION MANAGEMENT. SO ANSWERING QUESTIONS,

 RIGHT, THAT MIGHT BE CANNED QUESTIONS TO AN

 AGENCY RECORDS OFFICE SO THAT EVERY TIME SOMEBODY

 SENT AN EXAMPLE THERE WAS AN AUTOMATED ANSWER.

 SPEAKER: YEAH, JUST I DON'T KNOW IF YOU GOT THAT

 CHAT QUESTION OFF OF THE YOUTUBE BUT IT IS THERE.

 SO WE'VE CAPTURED THAT. AT THIS POINT I WILL DO

 SORT OF A LAST CALL FOR QUESTIONS, REMINDER, YOU

 CAN STILL E-MAIL THEM OR DROP THEM IN THE CHAT.

 WE WILL TAKE A FEW MOMENTS TO SEE IF ANY COME IN.

 SPEAKER:

 SPEAKER: SO I THINK WE'VE COVERED ALL OF THE

 ONES. I THINK WE WILL MOVE IT -- I WILL START TO

 WRAP IT UP. THANK YOU. SINCE THERE ARE NO MORE

 QUESTIONS WE WOULD LIKE TO TAKE THIS OPPORTUNITY

 TO THANK YOU FOR VIEWING AND PARTICIPATION IN

 TODAY'S MEETING. WE WOULD LIKE TO REMIND YOU

 THAT OUR NEXT BRIDG MEETING IS WEDNESDAY,

 DECEMBER 16TH, 2020. IF YOU STILL HAVE

 60

 QUESTIONS, PLEASE STILL USE THAT E-MAIL, RM DOT

 COMMUNICATIONS AT NARA.GOV OR VISIT OUR BRIDG

 PAGE AT THE URL. THANK YOU EVERYONE AND HAVE A

 GREAT DAY.