

BRIDG

Bi-monthly Records and Information Discussion Group

February 15, 2012

RACO 2012

- Integrating online training with face-to-face presentations
- Two Webinars
 - Tentative months: April and July
 - Large topics (e.g., ERA, Presidential memo)
- RACO
 - September 25, 2012
 - Archives I's McGowan Auditorium
 - FREE!
 - Presentation of Archivist Achievement Awards

Appraisal Team Reorganization

- An update on the reorganization of the Appraisal Teams and agency assignments, as announced in Memorandum to Federal Agency Contacts AC 07.2012

Appraisal Teams and Account Managers

- Quick reference sheets
 - on new appraisal teams structure in OCRO
 - on areas of expertise covered by your appraisal contacts and FRC account managers, if you have questions

Office of the Chief Records Officer

Office of the Chief Records Officer (AC)

Paul M. Wester, Jr.

Chief Records Officer for the U.S. Government

National Records Management Program (ACN)

Laurence Brewer, Director

Records Management Training Section (ACNT)

Bill Bridges, Director

Permanent Records Capture Section (ACNC)

Matthew Eidson, Supervisor

Records Management Services (ACNR)

Margaret Hawkins, Director

Systems Integration, Design, Support, and Adoption
Cathy Westfeldt, Supervisor

General Records Schedule Team (GRS)
Andrea Loiselle, Supervisor

Agency Assistance Team (AA)
Bill Greathouse, Supervisor

Appraisal Teams
Laurence Brewer (Acting)
Lisa Roberson
Kate Flaherty
Sam Welch

Policy Analysis and Enforcement (ACP)

Don Rosen, Director

Electronic Records Format Section (ACPE)

Kevin De Vorse, Supervisor

Records Management Policy Section (ACPP)

Mark Giguere, Supervisor

Records Management Oversight Section (ACPO)

Cindy Smolovik, Supervisor

Appraisal Teams in NARA's Office of the Chief Records Officer

APPRAISAL TEAM 1

Laurence Brewer, Acting
Erin Cayce
Lauren Crisler
Jametta Davis
Lizzie Greenberg
Rebekah Meservy

Department of Homeland Security
Department of Justice
Department of the Treasury
Judiciary
Coast Guard
Independent agencies: CFPB, CFTC, CNCS, FCA, FDIC, FHFA, FRB, FRTIB, GSA, MSPB, NCUA, SBA, SEC

APPRAISAL TEAM 2

Lisa Roberson
Rachel Ban Tonkin
Sean Curry
Ryan Morrone
Meredith Schreiber

Department of State
Department of Transportation
Executive Office of the President (Federal)
Intelligence Community
CMMS, HUD, SSA
Independent agencies: BBG, CPSC, Ex-Im, FCC, FEC, FMC, MCC, OPIC, Peace Corps

APPRAISAL TEAM 3

Kate Flaherty
Tom Cotter
Mark Ferguson
John Hulmston
Wendy Knell
Valerie Terray
Henry Wolfinger

Department of Agriculture
Department of Commerce
Department of Education
Department of HHS
Department of the Interior
Independent agencies: CBO, EPA, GAO, GPO, NASA, NCPC, NIGC, NSF, PRC, USPS

APPRAISAL TEAM 4

Sam Welch
Jim Cassidy
Rich Noble
Steve Rhodes
Dave Weber
Tony Williams

Department of Defense
Department of Energy
Department of Labor
Department of Veterans Affairs
Independent agencies: FERC, FLRA, FMCS, NLRB, NMB, NTSB, NRC, OPM, PBGC, RRB

REGIONALIZED AGENCIES

Agency for Toxic Substances and Disease Registry – Randy Jones, Agency Assistance
Bonneville Power Administration – Bill Greathouse, Agency Assistance
Bureau of Indian Affairs – Jennie Guilbaud, GRS Team
Center for Disease Control and Prevention – Randy Jones, Agency Assistance
Defense Finance and Accounting Service- Galen Wilson, GRS Team
Equal Employment Opportunity Commission – Andrea Loiselle, GRS
FAA - Bill Greathouse, Agency Assistance
Federal Trade Commission – Galen Wilson, GRS Team
Fish and Wildlife Service – Bill Greathouse, Agency Assistance
Indian Health Service - Andrea Loiselle, GRS
Intl Boundary Commission, US and Canada, Marvin Kabakoff, Agency Assistance
Intl Boundary and Water Cmsn, US and Mexico, Marvin Kabakoff, Agency Assistance
Intl Boundary and Water Cmsn, US and Canada, Marvin Kabakoff, Agency Assistance

Missile Defense Agency - Randy Jones, Agency Assistance
Mississippi River Commission – Randy Jones, Agency Assistance
Morris K. Udall Foundation – Cathy Westfeldt, SIDA Team
National Endowment for the Arts – Kathleen Collins, Agency Assistance
National Endowment for the Humanities – Kathleen Collins, Agency Assistance
National Park Service – Marvin Kabakoff, Agency Assistance
Southeastern Power Administration - Randy Jones, Agency Assistance
Office of Navajo and Hopi Indian Relocation – Cathy Westfeldt, SIDA Team
Research and Innovative Technology Admin, Marvin Kabakoff, Agency Assistance
TVA - Randy Jones, Agency Assistance
U.S. Commission on Civil Rights – Andrea Loiselle, GRS

Quick Reference Guide to NARA Records Management Contacts

To better serve our Federal agency customers, NARA has created a new organization—Agency Services. The Office of the Chief Records Officer (OCRO) and the Federal Records Center Program (FRCP) are two key components of this new organization.

The staff in Agency Services who have primary responsibility for interacting directly with agency customers regarding records management issues are the **Appraisal Archivists in the OCRO** and the **Account Managers in the FRCP**. We have recently made some changes to the assignments of these staff in order to be more responsive to customer needs and help the Appraisal Archivists and the FRCP Account Managers work together in serving our customers.

The chart below explains which NARA staff (Appraisal Archivist or FRCP Account Manager) you should contact for specific questions. Please feel to contact these staff members for any additional questions not listed below. For information on NARA's Records Management Training Program, please contact William Bridges (william.bridges@nara.gov, 301-837-1710).

| Whom should I call? | |
|--|--|
| Appraisal Archivists | FRCP Account Managers |
| <p>Appraisal Archivists in the OCRO work directly with Federal agencies to appraise and process records disposition schedules and answer questions related to records management.</p> <p>Contact your Appraisal Archivist regarding...</p> <ul style="list-style-type: none">• General records management questions• Specific questions about records disposition schedules• Setting up appraisal visits• Questions about the General Records Schedule (GRS)• Submitting draft records disposition schedules for review• Records management briefings <p>To find your agency's Appraisal Archivist, visit http://www.archives.gov/records-mgmt/appraisal/index.html</p> | <p>FRCP Account Managers ensure that agency customers are satisfied with the services they are receiving from the FRCs and make customers aware of all of the services the FRC can provide on a fee-for-service basis .</p> <p>Contact your FRCP Account Manager regarding...</p> <ul style="list-style-type: none">• Questions on any FRC service, including:<ul style="list-style-type: none">○ Paper records storage and servicing (reference, refiles, destruction, active records management, Fast Packs, Metro Courier delivery)○ Electronic records services (electronic media storage and destruction, scanning services, eFRC—storage and servicing of born-digital or scanned records)○ Records management consulting services (creation of inventories and file plans; schedule development, application, and implementation; COOP and vital records program development; advising on e-Systems and RM requirements)• Questions about your FRC invoice or annual agreement <p>To find your agency's FRCP Account Manager, visit www.archives.gov/frc/acct-reps.html</p> |

Meet Your NARA Representatives!

- Open Houses at Archives I
 - Wednesday, February 15th, 1:00 pm
Appraisal Team Three agencies
 - Thursday, March 8th, 9:00 am Appraisal
Teams Two and Four agencies
- RSVP to RM.Communications@NARA.gov, or call Shannon Olsen at 301-837-3486 to reserve up to 3 people from your agency.
- Stay tuned for Webinar information for regional agency staff, and HQ staff unable to attend one of the above dates.

Contact Information

- Appraisal Archivist contact information
 - <http://www.archives.gov/records-mgmt/appraisal/index.html>
- FRC Account Managers contact information
 - <http://www.archives.gov/frc/acct-reps.html>

Intro to the GRS Team

Feb. 15, 2012

BRIDG Meeting

GRS Team Mission

- Update and revise the GRS
- Developing new GRS authorities
- Promote better understanding of and consistent implementation of the GRS
- Serve as subject matter experts

The Team

- Andrea Pugsley Loiselle,
Supervisor/Team Lead - Kansas City,
MO
- Jennie Guilbaud - College Park, MD
- Susan Means - Anchorage, AK
- Leslie Watson - College Park, MD
- Galen Wilson - Dayton, OH

FY 12 Plans

- Three main projects:
 - GRS Restructuring Study
 - Guidance for including GRS authorities in big bucket/functional schedules
 - New GRS for web and social media content
- Other projects:
 - Guidance for using GRS 20 when scheduling electronic systems
 - Other guidance/training?

Long Term Plans

- Revision/update of existing GRS
- New GRS
- Authorities to cover common permanent records
- More guidance/knowledge sharing

Contact Us

- Team e-mail account: GRSTeam@nara.gov
 - Questions about interpretation or implementation of GRS authorities
 - Suggestions for guidance products
- GRS Survey: March
 - Seeking input on where revisions are needed, priorities, and ideas for restructuring; also collecting information for new web/social media content GRS