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NARA CART-BRIDG Meeting-Atlanta, GA
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>>> Good afternoon, everyone, and welcome to our rescheduled BRIDG meeting. I will be serving as the moderator for today's meeting. As a reminder, the office hosts these bimonthly records and information discussion group, or BRIDG, meetings to present information relating to federal records management. BRIDG is co-produced by the office of the chief records officer for the United States and the federal records center program and is livestreamed to the audience over our YouTube channel. Generally BRIDG meetings consist of a scheduled program of presentations with an open forum at the end of each meeting to ask questions of the presenters or of any related federal records management topic of interest. Viewers are encouraged to post questions in the chat or by sending an email to RM.communications@NARA.gov. Our staff will be monitoring this email box during the meeting.

You are also welcome to make comments during this meeting in the YouTube chat. However, keep in mind that all comments are subject to moderation, so we ask that you keep the comments relevant to the topics being discussed. Copies of the presentation slides will be posted on the BRIDG page of the Archive's website. That web page is also where you'll find links to the transcript of today's meeting when it is available as well as links and information about previous and upcoming BRIDG meetings.

If you have general comments about BRIDG or suggestions for future topics, you can use that same email address, RM.communications@NARA.gov, to pass these along to us. We welcome your feedback. With that, I would like to start today's meeting we introducing Laurence Brewer, chief records officer for the U.S. government, to get us under way. Good afternoon, Lawrence.

>> Hey, thanks, Arian, good afternoon, good morning to everyone. I'm glad you are able to join us for BRIDG. We have a very special program today. And I'll go over that in a minute when we get to the agenda slide. But before I do, I just had a couple of quick announcements, just a couple of things to direct your attention to. First, this week we released our final strategic plan for FY22 through '26. Many of you have seen the drafts and commented on the draft strategic plan. It is now posted on our website. So for those of you in records management, goal 3 is where you'll find a lot of the work that we'll be doing in records management and working with you and your agencies. There are a number of objectives that are described there, which really get to issues like equity and scheduling an appraisal, an emphasis on transparency, and getting our data that we're collecting out to the public and to agencies. And as you might expect, more guidance for agencies especially on emerging topics and, of course, a greater emphasis on regulations and digitization standards. So a lot of work for us to do. And, of course, a lot of work that's not specifically in the strategic plan. But I encourage you to take a look at the plan itself. Look at all four goals and the work that's being done, in goal 3, if you have any questions, send them our way. We will certainly plan, at future BRIDG meetings, to do a deeper dive into the work that we're going to be doing and focusing on here at the National Archives with the strategic plan.

Second announcement sort of related to that, because it is a strategic document and it's the one that you all know and love, OMB NARA M-19-21. I know the questions are going to

come up so I'm just going to say right now that at this time I don't have an update on changes to the target dates or anything else that's been -- you all have been working under with that memorandum. We continue to work on that issue. We're aware of the concerns that many of you have been experiencing over the past two years and trying to bring your programs and your agencies into compliance with those goals. So allky tell you right now -- and I think it is the more important message -- is to keep working on the goals and continue your efforts to make that transition to fully electronic government, because the work is important, and we want to see fully electronic government happen sooner rather than later.

So more on both of those topics later on, and hopefully at future BRIDG meetings and other agency meetings that we're going to be having the rest of this fiscal. So if we could flip the slide. So the agenda today, you can see it is a very special BRIDG meeting. We are fortunate to have the Archivist Of the United States join us for a conversation on the eve of his retirement. We will also have presentations by Chris Pinkney who will talk about some updates for the Federal Records Center's program, and that's a close program with a presentation on transfer of classified documents.

And before we get into the program itself, I am going to introduce Jay Trainor who is the Executive for Agency Services for some opening remarks. Jay is responsible and has oversight for five programs within agency services of the National Archives, of course, my office, the office of the chief records officer, but also the national declassification center, OGIS, which is the office of government information services, the information oversight security office, and of course the federal records center's program. So with that let me pass the microphone over to Jay Trainor.

>> Thank you, Laurence. So today we remember Gordon Everett after his sudden passing on February 25. After a long private sector career in customer service, Gordon joined NARA in 2010 as a National Account Manager and quickly rose to serve as the first Director of Customer Relationship Management Division for the Federal Records Center program, and he held that position for about a decade. More recently Gordon became the FRCP Director in May of 2021. In all three roles at NARA, Gordon was a commanding presence at BRIDG, and his steady leadership, mentorship, and positive attitude will most definitely be missed at NARA and with you, our customer agencies.

I would like to highlight two other career accomplishments for Gordon. He was selected for and completed the Excellence in Government program that is administered by the partnership for public service. His group project on federal terminology was later incorporated into NARA's online orientation and our new supervisor development program, and we are aware that it's also been used at a few other agencies. Gordon became an advocate for the EIG program and later sponsored other NARA participants.

Gordon also served as the liaison for the NARA one-voice phone system that manages calls to our toll-free number. Gordon's leadership led to a reduction in abandoned calls and helped streamline the process for callers to connect with our highest-volume services that includes the National Personnel Records Center, research at NARA, Public Programs and Museums, press inquiries, and employment opportunities at NARA.

Gordon was a graduate of Winston-Salem State University and was a very active member of the alumni committee as a Chairman and later as Co-chair. Gordon was a devoted husband and proud father. He is survived by his wife, Sharon, daughter, Jasmine, and son, Gordon Jr. Gordon will be greatly missed. His commitment to customer service and employee engagement were unparalleled and made a positive impact at NARA. More important than

what he accomplished is how he conducted himself by always maintaining a positive, can-do attitude. On behalf of NARA and Gordon's family, I am grateful for the condolences and support we have received during this trying time. As we move forward, Chris Pinkney will serve as the Acting Director of the FRCP, and you will hear an update from him later in the program. Peace be with you.

>> Thank you, Jay. Just before we transition to our next segment, I just wanted to say Gordon was a great colleague, a good partner for many of you and your agencies and a friend to many of us. And I echo Jay's sentiments. He will be missed.

With that, let's flip the slide and begin the segment with our conversation with David Ferriero, Archivist of the United States. So first, thank you, David, for joining us and all of the federal records management community here today for this conversation. When I heard the news of your retirement after 12 years as Archivist of the United States, I knew I wanted to do this. To have an opportunity to get your perspective on the records management issues of the day, look back over your tenure, and perhaps maybe look a little bit into the future.

But before we get into the discussion, I do want to say how much I've enjoyed working for you these past several years. I've appreciated your leadership, not only in where we're going to go with records management, but also in how you led this agency through two very difficult years of COVID-19. So here we are in 2022. And if you'll indulge me one short sports analogy, so far this year we saw the retirement of Tom Brady, and then his unretirement. We're seeing the retirement of Coach K, two of the all-time greats, and now -- exactly -- and now with your retirement, I'll just say it, the greatest Archivist in the United States of all time.

So for me and many of the others watching today, you will be missed, but we wish you the best in whatever comes next, and maybe we'll hear a little bit more about what that is as we get into the questions.

So before we begin, I understand you'd like to kick things off.

>> Well, let me start by pointing out the comparison. That picture that you're looking at on your slide there was me when I arrived, and I had brown hair. So that's kind of an indication of what the last 12 years have been like for me. Let me start by thanking all of you for the work that you do every day to ensure that the records of this country are created, maintained, and delivered to us on schedule. It's a task that I'm sure you don't get thanked for every day. It's the most important task in the federal government in terms of preserving our democracy. And if there is a silver lining of what we've been through in the last year, anyway, the focus on the importance of records has really risen to a new public awareness. I think the public now understands how important those records that you are overseeing are to our democracy. So for me, thank you for the work that you do, and I have really been proud of the work that we have been supporting in your agency.

>> Thanks, David. So we've got a few questions with some contributions from your senior staff. I think they were trying to come up with some questions to stump you. I don't think the questions are all that difficult. We'll see how many we can get through, and time permitting, we may be able to take some questions from the audience as well.

So the first question is, what are you proudest of having achieved in your time as Archivist?

>> There are lots of things that I could point to. I think way back at the beginning, they had -- first of all, they had difficulty convincing me to leave my what now looks like a cushy job at the New York Public Library to lead this agency, but it was the conviction on the part of the Obama Administration that the National Archives had an important role to play in the Open

Government Initiative, and it was -- that was what tipped the scale for me in terms of what we could -- what I could bring to the organization. And that we worked very closely with IRA and the OMB around the needs, thinking about electronic recordkeeping, and we were very fortunate to capture the attention of the President and the delivery in November of 2011 of presidential memorandum where he used our language to describe the importance of good recordkeeping being the backbone of open government. So that, you know, really set us up to do some important work which resulted in the OMB NARA directive in August of 2012, which laid out basically the shift from paper to electronic recordkeeping, established the SAO positions, raised the profile of recordkeeping across the executive branch, created and directed OPM to create the occupational series. I can still remember the public meeting where I discovered there was no such thing as a sort of records management occupational series, which startled me, and basically the overhaul of the general records schedule. All that's spelled out in the directive.

And if I'm proudest of anything, I can point to that as really, you know, historical. It's the first time since the Truman Administration, basically, that the White House has gotten involved to that degree in recordkeeping.

>> Yeah. I remember that time. Those were fun times. Those were also challenging times but really exciting time to try and figure out what we want to get out there in that first directive, what do we want to focus on. It really is great looking back, you know, from where we were in August 2012 to where we are now and all that we've accomplished.

So the second question is -- and this is kind of a fun question -- what surprised you the most during your tenure as Archivist?

>> I think I shouldn't have been surprised, but I was surprised by the sorry state of the information technology infrastructure within the executive branch. I guess I just assumed that the federal government had so much money that they would have invested in information technology more robustly. And having come from the academic field where we worked through that and developed the enterprise approach to information technology, I just assumed that the federal government had come that way also. So it still bothers me because we're still not where we need to be in terms of that infrastructure. We've made some progress in terms of looking at enterprise approaches, using -- convincing GSA to get involved in ensuring that IT systems and records management capabilities, those kinds of things, but we're still not -- it's all -- it's still a struggle to convince the funders that information technology needs to be refreshed. It needs to be robust, and it's something that needs continuing investment. So that was the biggest surprise, I guess.

>> Yeah. I certainly agree with you there. Another fun question, what was the most enjoyable moment from your time as Archivist and an event you were invited to, a person you met, something like that?

>> So a couple of things. I've got two answers to that.

>> Yeah.

>> One fun thing we did -- we started doing sleepovers in the rotunda for kids ages 12 years old. So twice a year, fall and spring, we invite first come, first served, 100 kids and an adult with them to spend a Saturday night and Sunday morning with us with a whole set of activities, scavenger hunts and movies and readings and things like that. And that's really been a lot of fun. These kids are history nerds, and they're just, you know, tingling at the prospect of sleeping on the floor of the rotunda in the presence of the charters. So that's a lot

of fun. And I spent the first sleepover I spent on the floor of the rotunda and never did it again. And it was not just how hard the floor is, but it's the snoring.

>> (Indiscernible) in there, too.

>> It's not too bad. Not too bad. But the most meaningful moments for me have been the two naturalization ceremonies a year that we do. We swear in anywhere from 75 to 125 new citizens of the United States in the rotunda in the presence of the charters. And it's just a moving ceremony, and we have been fortunate to have some really great speakers to talk to this new group of citizens about their rights and responsibilities. We had Madeleine Albright, Elaine Chao, President Obama, Jose Andres, for instance, talking about their own stories and the importance of the documents behind us. So those are the two things I would point to.

>> Yeah. I recall something along those lines. I was fortunate to get an invite to one of the naturalization ceremonies at Archives One, and I remember that year it was President Obama who came and delivered some remarks in the rotunda. And it was a special moment.

>> It really was.

>> Okay. I've got a question here. And this may be a tough one. This one was one of the questions submitted by your senior staff.

>> Aha.

>> In the holdings of the National Archives, do you have a favorite board digital record or the most interesting digitized series, either digitized by an agency or by NARA?

>> I have one of each. And born digital is a series of email messages from me to John Koskinen. He was the IRS Commissioner. Before that he was President Clinton's Y2K Czar. During, you know, the transition to the year 2000, at which point I was the librarian at Duke University, and John was on the Board of Trustees, in fact, the Chair of the Board of Trustees when I was appointed at Duke. And I wanted him to donate his nongovernment Y2K material to the Library at Duke. So there's a series of email messages between us that are government records. And I had forgotten all about it until the Clinton Library forwarded some of that to me when I became Archivist. So there's the born digital.

And then for the digitized records, I would point to the work that we've been doing with the VA on Bluewater Navy, Coast Guard digitization project. An important set of records to support veteran -- Vietnam veteran claims for agent orange exposure. Very important to have this information about where those ships and boats were during the war. And as a Vietnam vet myself, I'm really proud of that work that we did.

>> Excellent. So the next couple of questions are focused on records management. Trying to get your thoughts on, you know, some of the things we've done and still need to do. The first one is what do you think was the most significant achievement in federal records management during your time as Archivist?

>> I guess I would point to getting our heads and arms around social media. And I can still remember being on the Acela coming to Washington for -- I had to go through a series of meetings with members of the Senate committee that was -- my confirmation committee. And he was coming up for one of those meetings and reading in the paper that the White House had led an RFP for advice on managing social media. And I'm saying to myself, I'm not the Archivist yet, but it seems to me that that should be something that the National Archives is providing. Why are they going outside the government?

So it gave me some indication that maybe we weren't where we should be around social media. So I think -- and my attitude at that point -- and as I said, I wasn't even Archivist yet -- but if we're responsible for providing guidance to the agencies about their use of technology in

records implications, then we shouldn't be fooling around experimenting with social media. So focusing on that and unleashing a lot of talent in the agency to look at that and then to be able to provide guidance, I think I would point to that. Major accomplishment. We're now -- the National Archives is now on 16 platforms and, you know, it's not the easiest thing in the world, as you all know, especially with Snapchat and all kinds of disappearing, short-term burn phones, all that kind of stuff.

>> Yeah. We're actually already getting some comments related to those kinds of messages, ephemeral messages disappearing. We'll get to some of that a little bit later. We already touched on and you mentioned some of your concerns with technology and infrastructure that also contribute to some of those challenges, and we know we have more work to do with policy around social media and all of these new emerging technologies that just keep us on our toes every day.

So one forward-looking one. What do you think the biggest challenge -- and we've already talked about a few -- either the biggest challenge in records management will be for the next Archivist?

>> I think it's this deciding, managing this deadline that everyone's concerned about and factoring in what has the impact of the pandemic on all of us over the past two years. So I think that's high on the list of things. The information technology infrastructure issues, the FOIA backlog issue across the executive branch, huge, huge issue that needs some solutions. Those are the things I would point to.

>> Okay. Let's see. So this is one of the last records management-specific questions that I have for you today. What message would you like to impart to the agency records officers in the call today and the other professionals working on records management about their role in preserving our government's history?

>> So as I said when we started, you are doing the most important work in the government in terms of preserving our democracy. The Archives was established after many years of discussions and thinking -- it was established to ensure that the American people could hold their government accountable for its actions and learn from the past. And that's the work that you enable every day. And that work is crucial to our survival as a democracy. So kudos to all of you for that work. And you should take great pride in it. Unlike other countries, you know, we really focus on collecting what is the most important record of our administrations, the good stuff and the bad stuff, and it's really important that we make sure that we are able to continue that work.

>> Great. So my next question is -- I don't know if you'll have the opportunity to do this personally, but what advice would you give to your successor?

>> Spend some time getting to know your staff and getting to know your constituents. You know, I always -- in my transitions from -- you know, I was at MIT for 31 years and then went to Duke University, and I was there for eight years and then the New York Public Library for five years. And each one of those transitions was my belief that I could make a difference in the organization. You know, I knew enough about what the business of the organization is, and I knew what some of the issues that needed to be addressed, but I always felt that I could make a difference. And that was important work background for me and coming into a new organization, first of all to identify the talent in the organization, to get firsthand information about the history, you know, how did we get to where we are, and not bring in a posse. I never, in my transitions, brought -- felt that I needed to bring, you know, outside talent in. The

first thing is getting to know the place and getting the organization to know me. That I certainly would advise.

And then at the same time learn your constituents. Spend some time with your, you know, who are your researchers? Who are your agencies? Who uses -- who depends upon you for services? We've spent a lot of time becoming, you know, a user-centered organization thinking about what do we look like from a user's perspective? How can we make it easy for our constituents to do their work? How can we support them? Those kinds of things. And you're only going to get that firsthand by talking to them, opportunities to meet with them, and also those members of your staff who are directly involved in those researchers and agencies.

>> Great advice. And, I mean, just from, you know, the past year or so, all the work that we have done with customer experience and hiring a Customer Experience Officer, I think, is only going to put us in a really good position going forward with all of our various customers that we work with at National Archives.

>> I agree.

>> So last question. What's next for you? Any big retirement plans? Any chance of pulling a Tom Brady?

>> No chance. And no plans. The plan is don't plan. It's one day at a time.

>> All right. Well, I can't thank you enough for joining us today. I just wanted to note that in the chat, as we've been talking, there have been a number of congratulatory messages from the audience thanking you for your service. Got a nice comment from Alex Howard who we both know well. And he says, thank you for your service, and he's acknowledging good records management is the backbone of an open government that is transparent and accountable to the people it serves. I couldn't agree more, and I'm sure you agree as well.

>> Thank you, Alex.

>> So we'll keep the chat open and see if anybody has any questions or comments. I've got Lisa working behind the scenes to grab any questions. So I will pause for a second. All right. Well, I hope you all have appreciated and enjoyed this conversation as much as I have. Thank you again, David, for joining us. It's been a lot of fun. And, again, wish you nothing but the best in whatever comes next.

>> Thanks a lot. Take care.

>> Thank you. So with that, I will turn it over to Chris Pinkney, I believe, who has the next set of updates in our program. Chris?

>> Thank you, Laurence. So I very sincerely wish that the circumstances behind my presenting today were very different. Gordon had been a good friend to many within the Records Center program. And he was also a very eloquent proponent of our operation. And this is not quite the plan the two of us had been discussing in mid-February. So I am -- I'm not nearly the public speaker that Gordon was, but I hope folks will bear with me for a few minutes here because I think the contents of our updates will be good news to our many FRCP customers.

The waning of the pandemic has allowed us to reopen all FRCP sites. And as of Monday, March 28, NARA staff had been re-called at all federal records center and occupancy returned to 100% of our pre-pandemic levels. Are staff are already working additional hours in many centers in an attempt to reduce the backlogs. Multiple sites have initiated Saturday work and/or extended daytime hours. Three of our locations, the NPRC, the Kansas City FRC, and the Lee's Summit FRC, have instituted additional shifts and we've added temporary contractor

support, and the plan is now in place to bring on additional support at six of our other locations with large backlogs.

When we look across the system, the backlog situation is different at each center, which is a reflection of the local collection maintained within individual FRCs. Already at all of our sites are essentially current with reference activities, and all centers are working hard to get that as quickly as possible. But the backlogs are very large at some centers. We have literally millions of pending reference requests, many associated with projects, the service across the system, and that remains our highest priority right now.

We also have an approved disposal backlog that cited 1,973,519 cubic feet on Monday. Recovery from that will not be quick as the volume is comparable to what we had to handle after the tobacco industry litigation freeze lift. We do have textual and nontextual disposal contracts in place to cover all of our locations, and we have plans in place to eliminate the disposal backlog within two calendar years to include both the boxes that are currently delayed as well as those that get approved for destruction in the next 24 months.

The situation is similar with new transfers. On Monday morning we had 204,020 boxes which agencies have been approved to ship to us. And I should note that those are only the known knowns. Unknown to me at this point is the volume the agencies have politely held during the pandemic and for which have yet to prepare and submit SS135. So I suspect that the volume of incoming will be substantially greater.

So I should address the fact that in the last week or so, I've received several phone calls or emails related to the restart of our metro courier service and the WNRC truck service. Restart of those operations is anticipated, but it has not yet occurred. It's very likely that the restart will be on a center-by-center basis as appropriately licensed drivers are available, vehicles are fully serviced, and sufficient floor space cleared to receive pallets and streamliners of new records.

The story with our agency review rooms is very similar. And I should stress that I'm talking about agency review rooms, not public research rooms, which are controlled and managed by other NARA entities. Most of the FRCP agency review rooms were by appointment only pre-pandemic, and we are headed back towards that mode of operations. Our most active rooms have historically been at the NPRC and the WNRC, and access is dependent upon available personnel for coverage. For right now, any appointment should be negotiated on an ad hoc basis with the host center.

The status of each FRC will continue to be reflected on the FRCP web page and the FRCP operating status table. For most of our services who have returned to standard operations, I would like to highlight the situation with the physical shipment of approved transfers. For a little while longer we're asking agencies to coordinate shipments with the receiving center. We do still have significant congestion on the floors at many sites, and our staff are working to shelve records and get that activity back to normal mode of operations.

So all that said, I feel that I would be somewhat remiss if I gave everybody the impression that we were immediately going back to 100% pre-pandemic world, because that's not really the case. Staff safety remains very important to the FRCP, and probably like most of you, we've modified a number of our internal work processes to allow for additional physical distancing and limit congestion in maternal spaces. Air filtration has been upgraded at many of our sites and we're piloting Hepa filters at four centers. The bottom line is that with multiple and internal processes, we're still rather feeling our way in determining exactly how we will conduct operations in a post-COVID world.

But I should also point out that that is not all bad. We've learned how to improve many of our internal operations during the pandemic, and those modifications will remain in play as we aim for a return to normalcy. For example, we now have greatly expanded access to laptops, tablets, and we have an upgraded IT network. And this means that we have greater ability to handle electronic activities remotely, and if one center falls behind with a process like reviewing transfer requests, attaching SS135, or conducting disposal reviews, we now have a network of trained staff at other centers who can assist.

And I think that's pretty much the story for today. Either myself or another FRCP staff member will be back at future BRIDG meetings to provide updates. I would encourage anyone with agency-specific questions to reach out to your assigned FRCP account representative and see how we can help now that we've reopened. And I guess at this point we can take any FRC-specific questions that may have come in.

>> Thank you, Chris. We do have -- while we're waiting on questions, we did get one comment I'm very grateful for all the extraordinary assistance that my account rep, Pam Northern, and the WNRC staff, especially Cheryl Shareef and Al have provided to the Peace Corps during the pandemic. So a nice recognition of going above and beyond.

>> That's wonderful to hear. Thank you very, very much. I'll make sure they all get that comment.

>> And as of now, we have no further questions. We'll continue to monitor, and, Chris, I'm sure you'll be around to pick up anything on the end. And with that, we'll turn -- we'll move forward in the agenda to bring up Matt Eidson for improving resources for transferring classified records. Matt, go ahead.

>> Good afternoon. Supervisor of the permanent records capture team. And I'm here today to talk about a project that my team and others have been working on devoted to transferring permanent classified records. Next slide, please. The project was started in 2020, and the goals were to identify what improvements NARA could make to the current process and encourage more timely transfer of classified records. Particularly those that are involved in the annual move of records from the Federal Records Center program to archivable custodial units. As you know, classified transfers are unique, and they follow a slightly different process than unclassified transfers do.

In order to transfer classified records, by the time of their disposition authority, they must be reviewed. And oftentimes the review process at agencies can be long and resource intensive. So, for example, when we looked at data pulled for a four-year period, out of about 3500 eligible transfers, only 28% were successfully successioneed. Next slide, please.

We wanted to see what we could do to better describe all of the nuances around classified transfer and also to promote the need for a greater level of planning so that transfers could be sent on time. And we are at the end of our project now, and I have a few helpful items to report on.

The first of which is a suite of new training resources through our Annual Move home page with helpful content including job aids, videos, online lessons, tip sheets, and checklists. Second, we've updated the Annual Move website with additional content and providing a home for these new resources. Third, we scheduled a webinar on May the 4th devoted to classified transfers. So please be on the lookout for an invitation coming soon. And lastly, starting in January, we'll be sending out the Advanced Transfer Classified List to get started so that agencies can have an advance of what records will be becoming eligible in the next five years. All right. Next slide.

Okay. So I mentioned the Annual Move webpage. All of the access and new resources are going to be available through our webpage. If you go to the Office of the Chief Records Officers on archives.gov as a records manager, you'll see a link under scheduling and transfer tile, annual move of permanent records. And if you click on that, you'll get all of this information that I've just described to you. Okay.

>> Thank you, Matt. We're monitoring to see if anybody has --

>> Sure.

>> -- says any questions. If not, we can also circle back to bring Chris up. There were a couple FRC-related questions that appeared. So, Chris, are you back?

>> Yes. Sure.

>> Thank you. The first question. Can you speak again about shipments of pallets of records to the FRCs, please? I want to make sure that I relay the correct message to my offices and disaster centers.

>> Sure. Not a problem. So at least for the next few weeks, we're asking the people who have approved transfers reach out to the local FRC and arrange for a date of shipment. The concern is that at sites that still have a lot of pallets on the floor, we might struggle to take in additional trucks if they arrived unexpectedly. So if you have 52-footers that need to ship, my hope would be that you can reach out to the TND unit at the receiving center and arrange a date on which those can come in. And we'll try to get back to something that looks like a little bit more like pre-pandemic life once we work through the first part of this backlog.

>> Thank you. Thank you. And another related FRC question. Will the FRCs be digitizing permanent records for federal agencies?

>> So we do have document conversion units. And one of the projects that we've been engaged in is trying to confirm that we have the equipment and the software in place to be prepared for permanent records standards. There have been a number of software upgrades that have been executed on our equipment during the pandemic. I think one of the challenges that we're still working through with our document conversion units is making sure that we've come up with a safe manner for our staff to operate. Those have generally been pretty packed offices, and we're still making certain that we can come up with a workflow that will be efficient but will also allow people to socially distance and not feel that they're on top of each other as they do things from printing to scanning to quality control.

So I think the answer for right now is we do offer scanning services. We hope to be able to meet any permanent records standards that are required and that we're not quite ready to actively restart that type of operation at this point. It will probably be several weeks or several months out. New projects.

>> Thank you for that. Have standard record requests resumed, or should we continue with the emergency request for records process?

>> That's a great question, and standard reference requests have resumed. We're trying to get those in and out as rapidly as possible. Some of our centers that had smaller backlogs are already back within the 24-hour turnaround. There may still be some delays at sites that had larger backlogs. But we're working to get everything back into the 24-hour turnaround for standard reference requests.

>> Thank you. I think this is a question for Matt. Can you repeat the dates for the advanced list for classified records?

>> Sure. Yeah. We'll be starting in January of next year, sending out the advanced transfer classified lists. We normally send out a candidate list for each annual move, and we'll

continue to do that, which will contain both unclassified and classified transfers in it. But we want to start a course where we will send a listing of all the classified transfers within the next five years so that the planning can begin, which is needed to get them so that, you know, by the time they reach their eligibility date, they'll be ready to transfer. So January is when we're planning to send that out.

>> Thank you, Matt. So this sort of is a question for -- we've got a couple questions about resuming accepting direct on offers from federal agencies. And I know that's tangential to the FRCs, but, Laurence, do you want to answer that one?

>> So I'm not sure if you have the latest information from Research Services. I mean, direct offers are handled through the accessioning staff. They have an email address, e-transfers at NARA.gov. If you have questions, I would suggest emailing that address. I know they are working on communications and getting things sort of ramped up. And we have released, through our blog and up on our website, there are some new tools that relate to transfers, including direct offers. But in terms of, you know, how things are progressing, I think to get the best information, I would contact e-transfers and talk to representatives from the accessioning staff.

>> And just to clarify, the question was also about hard copy records. So I think that's not quite an e-transfer. That would be a regular direct offer.

>> I believe that email address, though, it does get you to the accessioning staff, and the supervisor who is responsible and oversees all accessioning. Even though it says e-transfers, I think questions about analog transfers can also be handled through that address as well.

>> I wanted to circle back. There was a question around commercial storage sites. So what about NARA-approved commercial storage sites? For example, temporary holdings sent there for now and permanent to WNRC, is there any true partnership with these facilities? I don't know, Chris if you want to comment on that.

>> So I don't know if I'm really equipped or prepared to answer that one. At this point the FRCP is perfectly happy to take in both temporary and permanent records. I know the time lines are getting tight for agencies. And I am aware that some agencies are starting to make that distinction between permanent and temporary as they make decisions. But I don't have any firm statement I could probably give on that beyond what I just said today.

>> Thank you. Once the FRCs discontinue the acceptance of paper records, will refile services continue?

>> That one I can answer. Yes. We will continue to service any collection that's in the building. And we'll be more than happy to service refiles and send out requests and anything else that's needed by an agency customer.

>> Do the FRCs anticipate digitizing permanent records already held at their facilities? Does M-19-21 impact the annual move in any way?

>> I guess I can answer the first part of that question. We do have DCUs, and I think I said earlier, we believe that our equipment will be sufficient to meet standards when they're finalized. It would be done at agency request. It would have to be under an agreement. And we do have limited capacity with our existing DCU setups. We're pretty good at boutique projects. We have more challenges when it comes to very large-scale digitization. I don't know if somebody else wants the second half of that question.

>> Sure. About the annual move and how it's affected -- so we'll continue to conduct the annual move. All of the transfers, the permanent records associated with disposition authority, they all have different dispositions. So those dispositions will continue to live out, and we will

need to continue to transfer permanent records on an annual basis when they're due year to year even beyond that because those records will still be living -- still be in their life cycle. So, yes, the annual move will continue on.

>> Okay. I'll note that there's also conversation on the YouTube chat about the FRC room field has been taking indirect offers with its delivery setup in advance, so sort of making sure you have -- go through everything you need to do to make that -- to facilitate that on both sides. And I'm scanning through our list again.

Oh, digitization. The status -- what is the status of the final rule for requirements of digitizing permanent records?

>> I can take that one. So we've been providing regular updates as we've gone along. We've advanced the standards and the regulations to the point where we are -- we have a draft final rule and language that reflects the adjudications of the comments that we've received from all of you, the agencies, and all the other input that we have received on the regs. We need to get obviously the final version of the final rule reviewed within NARA and by NARA management. And then per the normal standard processes, it will go over to OIRA at OMB. And then they would review and make some determinations on whether there would be another round of agency review given the changes and revisions to the document. But we're hopeful that we'll be able to get the standards out soon. And when I say soon, I mean in government time soon. Sometime towards the end of this year. But it entirely depends upon how the next steps in terms of, you know, finalizing the review and the coordination with OMB can take place. So we feel like we are getting there. In the meantime, I encourage you to, if you have any specific questions, reach out to our team and RM standards at NARA.gov if you have any specific questions about digitization or any of the work that you are doing.

>> Thank you, Laurence. Chris, you're not getting away so easily. Another question, do past disposition fees apply for classified records stored at FRCs?

>> So I think you came very close to stumping the chump. I would have to check our '22 fee schedule. If the individual who submitted that, if we can get an email, I'd be happy to try to get them an answer once I review and make sure I know exactly what I'm talking about.

>> Fair enough. Back to the M-19-21 conversation. Approving exceptions to M-19-21. Have we made any progress there?

>> So, yes. I will say we have. We have received a total of nine exception requests from agencies. So I know we've talked about it a lot, and it seems as though we probably have hundreds and hundreds in the queue that are planning approval, but the reality is we have a total of nine exception requests that are currently under management review. So we actually had some discussions this week with staff and with our management. We want to start reviewing those and making some decisions on those requests. We have to sort out some of the details in the process, but I expect that we'll be able to review and get some decisions back to agencies on those nine exception requests that are currently pending with us.

>> For the M-19-21 deadline, will the FRCs relax the standard from approved an arcus do to staffing concerns?

>> So I think that's being actively discussed. I don't know what the final answer will be on that. And I'm almost hesitant to give my opinion because I know it is definitely being discussed right now. Laurence, do you know the status of that memo?

>> Yeah. I was going to mention that, that we do have something in the works. As Chris notes, we have been hearing all the questions not only today but in past meetings related to M-19-21 and direct offers and transfers to FRCs, and we started putting together some FAQs

related to that. They are currently under review. We hope to be able to finalize them and send them out soon, and that will hopefully clarify some of the questions and will probably raise other questions that we can then follow up on. But, yeah. Chris is right. It is something that we have discussed and talked about. We're doing our best to give you the answers based on what we know now. But I encourage you to just stay tuned, and we'll be able to send out a more formal issuance that will be clearer with points of contact that you can follow up with.

>> So here's another question around the FRCs or maybe it's around the deadline. Do you anticipate the December 2022 deadline for NARA receipt of analog records to be extended just as we anticipate that M-19-21 milestone to be extended even though you can't say?

>> I think I can say that regardless of how it shakes out whether the Arcis status is submitted or approved, I don't think there's a realistic expectation that the final box would be in the building by close of business on the -- I think it's the 30th with the 31st being a holiday. My expectation is that we would continue to work with customers who have obtained approval to send in material to facilitate those transfers. I don't know if it will be a month, a quarter, two quarters. I don't know what the time lines would be yet. But it seems reasonable that we would work with people to the extent we can to get materials safely into the buildings.

>> And I'll just add, because I did speak to it a little bit at the beginning of the meeting and just to reiterate in terms of, you know, the deadlines themselves, we don't have any decisions. It's something that, you know, as I noted before, NARA can't independently make those changes on its own. So it requires some coordination with OMB. And we are doing what we can to convey the feedback that we are hearing from all of you as input and data points on how things are going and complying with those deadlines. And we hopefully will have some resolution and some guidance that we can share at some point soon.

>> Thank you, Laurence. And this one's probably for Matt. Per the annual move, is there a hard suspense date for transitioning classified records to NARA?

>> So the transfer of classified records. So every transfer that's associated to a particular disposition authority, and those disposition authorities say when those transfers are eligible to come to the archives. And so in order to -- in order to -- the additional thing that needs to be done is that the classified transfers also have to be reviewed, you know, in your agency, and there's a form that needs to be filled out and attached in ERA. And so that process takes a lot -- you know, it varies across agencies. And so it's the need to be more proactive and to do some advanced planning in order to have the review process completed by the time the disposition authority comes through. So there is a deadline. It's in the disposition authority for each of the transfer -- the associated transfers and not a central one for all transfers. If I'm interpreting the question right.

>> Thank you, Matt. I think that's it. There was a question about NARA GRS transmittal 32. Is there a target release date for that?

>> Monday.

>> Monday. So Monday, April 4, is the target date for GRS transmittal 32. Is NARA working on guidance for agencies as they return to the office or transition to the new hybrid work environment?

>> Yeah. That's a good question. And, you know, I don't know if it's something that's, you know, a records management question, per se. I think it's something that, you know, as a community, we can work on, see what the records management implications are. It might be a good topic for discussion within the FRM or within the records management council and we can put our heads together and see if there's something that we want to develop or share. We

don't have anything on our work plan currently to deal with it strictly from a NARA perspective, but it's certainly an area where, you know, I'm happy to facilitate some conversation and see what we can come up with. And I just want to say you're doing a great job, Arian, in sorting through all of these questions that are coming in. So keep them coming. Keep Arian busy.

>> So, Laurence, do you want to circle back from the question from this morning -- or at the beginning of the meeting about tech, social media, confide and WhatsApp?

>> Sure. I noted earlier when we were talking with the archivist, Howard, submitted that comment and I was more than happy to share that when the archivist was here. I see a question, WhatsApp messages in which public businesses discuss public records? And the answer is a clear and unequivocal yes. And I think that's borne out in recent legislation in the Electronic Messages Preservation Act which has now been codified into the Federal Records Act. And we will be working on regulations and guidance around electronic messages. And, you know, as everyone knows, our focus has been on email with Capstone, but we are interested in exploring how a capstone approach or other policy approaches would allow us and all of you, the federal agencies, to better manage and capture the various types of electronic messages that agencies create as they conduct business. So all of these are examples of such, and it is something that we are thinking a lot about and planning to work on. I'll also acknowledge, Alex, that there were a couple of other questions which I think delve into Presidential Records Act territory, which I typically as a rule stay away from the PRA and let the experts on the PRA answer those questions. So I'm more than happy to take those back and see if there are answers or responses from those experts that I could share with you.

>> Next question. And thank you for the shoutout, Laurence. There are a lot of questions. I think the Archivist inspired folks. How are we doing with updates to Arcis and ERA?

>> I can talk very generally and very briefly about recent Arcis updates, but if it's the Arcis ERA interface, there might be somebody better qualified to answer that specific question.

>> ERA is one of those areas where, you know, as you know, we typically like to bring the experts, Sam McClure, David Lake who are intimately involved and connected with what is going on with ERA development to BRIDG meetings. We do have plans to have some briefings in the coming months on what things are being developed and the progress on ERA, including integration. So I'm just going to leave it at that. And pretty much stop with a teaser for a briefing to come that -- where we can talk in much more detail about ERA.

>> Thank you, Laurence. I'm running through our list again. How can an agency comply with M-19-21 if they are not receiving dedicated federal funding and there's only eight months left? I think that's --

>> I think that's probably a concern that many agencies have. And, you know, to that, I would point to the data that we are receiving and the reporting, which we're hearing where agencies are in terms of compliance, some of the challenges they are facing. We know -- and I mentioned it earlier -- the impact that the pandemic has had on agencies trying to comply. My advice is to keep working, we know what we need to do and what initiatives that we need to sort of coordinate on in-house. Funding is always going to be issue regardless of what the work is. It's all a matter of, you know, how do we prioritize the work that needs to be done for M-19-21 and advocate for the resources that we need? And I know that in and of itself is a challenge. And that's an area where NARA's always been willing to help. We're more than happy to help you in meetings with senior officials to help make that case and advocate for what needs to be done for M-19-21. But, you know, at some point the reality of where you are and the records that you have and the challenges that you have could lead you to wanting to

draft a request for an exception from those deadlines. There are very specific requirements in NARA bulletin 2020-01 that we released with information about how to submit an exception and what to include in that exception, which includes things like a business case, milestones, specific things that you are going to accomplish with any extension of time or a business case for why an exemption is needed from the requirement. So there are things that you can consider and work on. In those cases I also encourage you to reach out to us and our team that monitors RM standards at NARA.gov, and we can review the situation if an exception is something that you feel like you need to submit at this time, and we can provide some advice and go from there.

>> Thank you. Another question that's come in via the YouTube, does NARA recognize agency Teams meetings as temporary or permanent records?

>> So, you know, Teams meetings, Google Meets that a lot of us do is another way that we are conducting business, probably more so than we did before the pandemic. So it's certainly a mechanism, agencies are typically creating notes, capturing minutes, which may be preserved and probably should be preserved as records. They could be either temporary or permanent. And a lot of that would depend upon the records schedule for the particular content that is covered in the meeting.

So, you know, it's not something where we schedule technology in and of itself, but there should be, for whatever the subject topic matter is and underlying schedule that covers the information, and that should be the focus. How we conduct our business is something we have to acknowledge and then figure out the implementation and the steps that we would need to take as records managers in our agencies to make sure that we are doing what we're supposed to be doing under the law, which is creating adequate and proper documentation of the activities, decisions, policies that we discuss no matter how we discuss them.

>> Could you advise on the status of the M-19-21 position classifications to incorporate records management responsibilities?

>> That's a good question. I haven't heard that one in a while. I can tell you we've had some discussions with OPM and the records professionals over there. I don't have an update on where that is right now. I know it's something that they have been working on and giving some attention to, but I don't have an update on the status of that work right now. It is something we can look into, though.

>> In addition to the OPM series classification, what skill sets, staffing levels, and resources does NARA recommend to handle the M-19-21 initiatives and the transition? So I don't know if you want to take that one as well.

>> Well, that's a good question. And there's a lot in there. And I think the question acknowledges that the work that we need to do right now to be compliant with M-19-21 and really be successful in a fully electronic government does require expansion and relearning or learning new skills that perhaps we didn't have as records professionals, you know, ten years ago. And I think that's a challenge for all agencies. You know, in order to be successful, we have to have -- you have to have more money, more technology, more resources, but we have to have the right resources. And I think that is one of the reasons why the job series is really important. And, you know, why, you know, we really need to focus on ensuring that all of us who are doing this work are set up for success based on having the right skills to be successful with this kind of work. So, I mean, it's a very good question. It's a really important question. And one that, you know, we, working with OPM in particular, want to really focus on and try and provide the kinds of not only standards but growing from the standards the tools and the

resources and the training where we can help everyone who's working in this field be successful.

>> Thank you. Here's another question that's come in. In relation to the M-22-09, the Zero Trust Initiative, what guidance does NARA have surrounding the requirements to automate classification of record sensitivity and the requirements to transition away from password requirements to e-authentication tools?

>> Wow! We're really into some complex territory now. Yeah. So, I mean, zero trust is, you know, it's an information security initiative. And M-22-09, I'll admit, haven't read it, not familiar with it, and probably, you know, one of those things that I need to add to my list. You know, these are areas whenever we look at information security, we're sensitive to, you know, areas where there might be some records management implications. A lot of times these kinds of records get covered through the GRS. We do have some chapters and schedules that deal with information security and IT kinds of records.

So you know, what I can say right now is it's something that, you know, we are aware of and have had some discussions about ZTA within our staff and in other parts of the National Archives. You know, one of those, as I mentioned earlier, emerging technologies, which may have implications for records management, that, you know, we have to monitor. And it should be one of the topics that, you know, as we meet together within the FRM, within the federal records management council meetings, that we start sharing where we are, what we're doing, what we're learning so that we can help all agencies with guidance if that is what is needed.

>> For permanent classified records that are exempt from transfer after declassification review, how does the federal agency notify the FRCs to update the disposition dates on the agency inventory listing?

>> That is a good one, and I think my off-the-cuff response would be to work with WNRC's T&D program to make any required updates in ARCUS. I think that would at least get us started if that was your situation. And we have a wonderful person by the name of Denise Sampson who is the current WNRC T&D branch chief.

>> Thank you, Chris. I'm just double-checking everything. I think we've got a couple questions that we're going to address after the meeting that have come in. We are coming up on almost 10 minutes left of this usual scheduled time for bridge. So I want to remind folks that -- last call for questions. And I'm not seeing anything else come across. So I think with that, maybe we've captured them all. I know some of the ones in the queue are sort of -- we've covered -- we've already covered. It's kind of the same ground over and over again on where we are and where the deadlines are and things like that. So with that, Laurence, do you want to close out the meeting?

>> Yeah. Thank you, Arian, again, for monitoring that lively Q&A session. Yeah, thanks to Chris and to Matt for chiming in with answers to questions. You know, we acknowledge, you know, there are some questions where we have good answers for. There are some questions where an answer is coming around the bend, and there are those questions where we just need to go back and figure out what the answer is and get back to you. So we'll keep the chat open for a little while. We'll keep monitoring it. And if there are some questions that do come in, we can follow up after the meeting directly and see if we can get some of those answers back out to you.

We can flip the slide. We will share with you when the next BRIDG meeting is. Remember this one was a rescheduled meeting. So we're not having the April meeting. So the next time we will meet will be in June. And we'll be working on the agenda, and perhaps

some of these questions and topics that came up today, we'll figure out a way to get them on the agenda for June. So with that, I want to thank everybody behind the scenes helping with production today and everyone who presented and answered questions. Appreciate all of you joining. Hope you have enjoyed this meeting. And we will talk to you again next time in June. Thank you all. Have a great rest of the day.