FLORIDA RECORDS MANAGEMENT ASSOCIATION

Annual Conference: May 20 – 23, 2025

Hilton Daytona Beach Oceanfront Resort, Daytona Beach, FL

TUESDAY, MAY 20th

Session Time: **10:30 – 11:30 a.m.**

Session Title: **Welcome New Members: Your Journey Starts Here**

Description: Whether this is your very first conference or you just want to know a little more about FRMA, this session is for you!

Join our President to learn how to get the most out of the conference from understanding the Roundtable breakout sessions, to networking events, to how to start on your path to achieving your FCRM. This session will be informational and interactive to answer any questions you may have!

Presenter: **Sea Shell Hannabass, FCRM, CRA, MPA**

Bio: Sea Shell Hannabass is the Enterprise Records Analyst for the Central Florida Expressway Authority with over a decade of experience in local government administration, records management, and enterprise content management systems. She holds a Bachelor of Arts in Political Science from the University of Florida and a master's in public administration from the University of South Florida.

Sea Shell has been involved with the FRMA Board since 2018, first serving on the Nomination Committee then being elected to the Director of Membership, the President-Elect, and now serves as President.

Session Time: **1:00 – 2:30 p.m.**

Session Title: **Basics of Records Management: Part 1**

Description: Managing public records in Florida is a challenging and complicated responsibility for every governmental agency in the state. To fulfill this mandate, public records managers must develop a fundamental understanding of the basics. This session will explore the core principles of Florida's public records law and management standards, with an emphasis on practical approaches and application.

Presenter: **Matt Daugherty, CRM, SML, Inc.**

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Bio: Matt Daugherty is a Certified Records Manager with over twenty-three years of professional experience managing Florida's Public Records.

As Executive Vice President of SML, Inc., Matt assists governmental clients with the development and maintenance of agency records management programs through policy and procedure development, training, and hands-on records management.

Prior to joining SML, Inc., Matt worked as a Records Analyst with the Florida Department of State, Records and Information Management Program and as a Records Clerk with the St. Johns County Clerk of the Circuit Court and Comptroller.

Session Time: **1:00 – 2:30 p.m.**

Session Title: **Surviving a Scandal: For Public Employees**

Description: In our School District we averaged 2-3 public records requests (PRR) every month. One Scandal hit us in 2016, and we were not prepared for the fall out. Almost 10 years later, we are still inundated with requests. We get between 500-600 requests per year. This session will discuss what not to do, what we did to manage and what we're doing now to keep up.

Presenter: **Eric Mitchell, Director MIS/IT Okaloosa County School District**

Bio: Eric began his career with Okaloosa Schools in July of 2000. Currently the Director of IT, the Records Management Liaison Officer (RMLO), and Local Agency Security Officer (LASO), he holds a master's degree in ETMS-IT, a Specialist's Degree in Curriculum and Instruction, and certified in Human Performance Technology (HPT). During his time here Eric has reshaped several IT areas. He was instrumental in starting the Seat Management IT Outsourcing program. His changes to the public records processes in Okaloosa is modeled by other Districts.

He's had the privilege of being invited to speak to education groups on the topic of both IT Outsourcing and Public Records Management. It's under his leadership that we now have a department in Mobile Learning, and his work with E-Rate has created IT savings that have helped the district fund critical infrastructure upgrades.

Eric leads with the 6 strategies to better service: Treating users with respect; eliminating jargon; design first, fix once; measuring service excellence; quick

communications; and following up. His philosophy is "if it doesn't make life easier no one will use it". In IT and as RMLO, protecting students is his first priority. "I love my job because there's something new every day."

Session Time: **2:45 – 4:30 p.m.**

Session Title: **Basics of Records Management: Part 2**

Description: Managing public records in Florida is a challenging and complicated responsibility for every governmental agency in the state. To fulfill this mandate, public records managers must develop a fundamental understanding of the basics. This session will explore the core principles of Florida's public records law and management standards, with an emphasis on practical approaches and application.

Presenter: **Matt Daugherty, SML, Inc.**

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Session Time: **2:45 – 4:30 p.m.**

Session Title: **AI MythBuster: AI Is Not Intelligent, So Why Do We Obsess Over It?**

Description: Can AI really revolutionize records management, or is it just clever marketing? We will go over:

- How will AI change records management
- History and the inner workings of AI
- Let's build our own AI live
- Fundamentals of large language models
- Future of AI - What can we expect

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- Will we see an AI tool for records management
- Trash data in, trash AI out, but is it actually true?

Presenter: **Kaan Volkan**

Bio: Kaan Volkan has read over 10,000 technical pages on IG technologies and helped numerous organizations clean up file shares. Now, he focuses on sharing his findings to help more organizations overcome data challenges.

His unique take on technology and vendors combined with his brief engaging style makes for some of the most entertaining and educational webinars.

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WEDNESDAY, MAY 21st

Session Time: **8:45 – 10:00 a.m.**

Session Title: **New Tech, Old Rules: AI as an Opportunity for RIM**

Description: People outside of RIM often fail to appreciate the incredible value that excellent records management and information governance programs deliver to an organization, mistakenly viewing us as a compliance-mandated cost center. The current disruption afforded by generative AI – which has suddenly put data and information governance front of mind for many C-Level executives – offers RIM professionals the opportunity to change the dialogue.

Presenter: **Dr. Darra Hofman, Master of Archives and Records Management, San Jose State University**

Bio: Darra Hofman is an Assistant Professor and Program Coordinator (Master of Archives and Records Administration) in the School of Information at San José State University, San José California, USA. Dr. Hofman received her Ph.D. in library, archival, and information studies from The University of British Columbia in 2020. She completed her MSLS from the University of Kentucky and her JD and BA (honors) from Arizona State University.

Her research examines the intersection of archives, technology, and law, exploring how records support human rights and human thriving. She is the principal investigator of the Cross-campus Interdisciplinary Responsible Computing Learning Experiences (CIRCLE) project, a Mozilla Responsible Computing Competition awardee.

Session Time: **10:15 – 12:00 p.m.**

Session Title: **Balancing Transparency and Data Privacy**

Description: What types of public records are subject to disclosure, and what are the exceptions? Why are some records protected from public access, and who decides? How do public sector professionals handle the challenge of balancing transparency with data privacy?

This presentation provides an overview of the concepts and challenges involved in balancing transparency with the need to protect sensitive information in the public sector. Drawing on years of experience in records management and working alongside city attorneys, I will share insights into

how public records requests are handled, why certain data must remain confidential, and the role of privacy laws in shaping these decisions.

Presenter: **Tyrene Bada, System Analyst, City of Beaverton, OR**

Bio: Tyrene Bada, MLS, CRM (she/her) is a dedicated Systems Analyst at the City of Beaverton, bringing her expertise in information governance and records management to her role. Previously, she developed and implemented the records program at Portland Community College, including its first internal records center.

An active ARMA member since 2008, Tyrene has held leadership roles as Chapter President and ARMA International Board member and currently chairs the ARMA International Conference Education Committee. She holds a master's in library science with a Certificate in Archival Studies from Emporia State University and contributes to the ICRM as a CRM exam part writer.

Outside work, Tyrene is passionate about music and theatre, performing regularly and serving as a professional cantor and chorister at St. Mary's Cathedral.

Session Time: **1:30 – 2:45 p.m.**

Session Title: **Records Management: Ensuring Compliance with Florida's Public Records Law**

Description: During this session, we will discuss the current state of Florida public records laws, with a focus on aspects that affect the management of records across all Florida agencies.

Presenter: **Linda Riedermann Norbut, First Amendment Foundation**

Bio: Linda Norbut is an attorney at Thomas & LoCicero in Tampa, where she specializes in media and communications law, business litigation, and intellectual property. A "Triple Gator," she earned her J.D. with honors from the University of Florida Levin College of Law in 2017, after completing a master's degree in mass communication law and a B.S. in Telecommunication.

Before joining her firm more than six years ago, Linda worked at the Brechner Center for Freedom of Information, a non-profit organization where she produced, among other things, a legal scholarship focused on open government and transparency and provided support in federal cases involving access to information and First Amendment challenges.

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Session Time: **3:00 – 4:00 p.m.**

Session Title: **Do Not Lose Your Cool with Trolls**

Description: In the course of their duties records management professionals will in time encounter trolling or attempts by people within the social media space to "catch" them in provocations or confrontations.

This presentation/discussion will cover on-line examples of trolling and encounters of this type. Strategies on dealing with these situations and how to avoid them in the first place.

Presenter: **Mark Gish, Division Manager, Palm Beach County Sheriff's Office**

Bio: Mark is originally from Chicago, IL and moved to Florida at an early age. He graduated from Santaluces high school in Lantana Florida, then attended and received a bachelor's and master's degree from Jacksonville State University, Alabama.

His career began in the 9-1-1/Communications Division at the Palm Beach County Sherriff's Office 30+ years ago. He has held the positions of Communications Officer, Communication Training Officer, Supervisor and Communications Manager.

Three years ago, he was offered the opportunity to move to the Central Records Division. Since making the transition, he has taken several training opportunities to learn how a law enforcement agency deals with the records it creates as well as how these specific records are provided to the public. He has also become a board member of the Palm Beach Treasure Coast ARMA chapter.

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THURSDAY, MAY 22nd

Session Time: **8:00 – 10:00 a.m.**

Session Title: **Legislative Updates**

Description: This session focuses on open government bills passed in the 2025 legislative session.

Presenter: **Pat Gleason, Special Counsel for Open Government, Office of the Attorney General of the State of Florida**

Bio: Pat Gleason serves as Special Counsel for Open Government for Attorney General Ashley Moody. She has also served as the Advocate for the Florida Ethics Commission and Chief of the Administrative Law Section in the Attorney General's Office. She is a graduate of Florida State University College of Law in Tallahassee. She is the editor of the Sunshine Manual and the Public Records Guide for Law Enforcement agencies.

Session Time: **10:15 – 12:00 p.m.**

Session Title: **Historical Memories and Preservation**

Description: Founded in 1937, the Historical Society of Palm Beach County was created to unite individuals passionate about preserving and learning the history of the area's pioneers. Shortly after its formation, West Palm Beach attorney A. Stanley Bussey donated a vintage black-and-white photograph of an island street scene—this marked the first contribution to what would grow into a significant collection of artifacts and documents reflecting the diverse cultures, communities, successes, and challenges of life in Palm Beach County.

This session will explore the role of historical societies in collecting, managing, and preserving historical information, particularly in relation to organizations that may have different retention policies.

Presenter: **Rose Guerrero, Director of Research, Historical Society of Palm Beach County**

Bio: Rose E. Guerrero is originally from Miami, Florida, where her love for history was formed. She earned a Bachelor of Arts and master's degrees in Anthropology from Florida Atlantic University. Rose has worked with several organizations as a preservationist of cultural heritage; co-authored a

children's book, The Misadventures of Sandy Trowels; and was an educator for PACE Center for Girls – Broward.

In 2016 Rose joined the Historical Society of Palm Beach County as Education Coordinator and became Research Director in 2019.

Session Time: **1:30 – 2:45 p.m.**

Session Title: **Public Records Sunshine Law**

Description: Florida Public Records Law is a comprehensive review of the state's responsibility to provide access to its records from the point of view of all 3 branches of state government. The class will discuss similarities and differences in the rules governing what records are public by branch, how they are processed, and what records are confidential or otherwise exempt from disclosure.

Presenter: **Richard "Rick" Courtemanche**

Bio: Mr. Courtemanche has been a practicing attorney in the State of Florida for over 30 years and has over 20 years of experience in public records on the state and local level. Currently he is Deputy General Counsel for The Florida Bar coordinating all public records responsibilities, including the drafting of policy, overseeing and coordinating the public records responses for all divisions, as well as records retention.

Mr. Courtemanche spent 15 years as Police Legal Advisor to the Tallahassee Police Department, providing advice and counsel to the Department on public records issues.

Mr. Courtemanche also handled public records issues involving post-conviction death penalty appeals for FDLE.

Mr. Courtemanche graduated from Florida State University (B.S. 1985) and the University of Alabama School of Law (J.D. 1988). He has been a member of the National Association of Bar Executives, the American Bar Association, Florida Association of Police Attorneys, and the International Association of Chiefs of Police. He is married and has four sons.

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FRIDAY, MAY 23rd

Session Time: **8:00 – 9:15 a.m.**

Session Title: **Disaster Prevention and Recovery**

Description: Will cover the 5 P Rule of Disaster Prevention and how everyone should have a plan for recovery with:

Proper Planning Prevents Poor Performance

Presenter: **Archie Matthews, FRMA Director of Administration**

Bio: Archie is an Alachua County native and still lives on the family farm. He has been active in agriculture, serving for over 40 years as a supervisor of the Alachua Soil and Water Conservation District. He was inducted into the Southeast Region Conservation Hall of Fame in 2024. He was a member of the Future Farmers of America in High School and continues to serve as an adult supporter of that organization through the Alumni Association and a member of the Florida FFA Association Board of Directors. Archie was inducted into the Florida FFA Hall of Fame in 2014.

His career in records management began accidentally. While working as a voting machine technician for the Alachua County Supervisor of Elections, he recognized that there were stacks of old records, with no order or even a good idea of what was there. He found out that there was a Records Retention Schedule, and began to sort through those records, eliminating what was no longer necessary to keep. After ten years in Elections, he became Records Bureau Chief for the Alachua County Clerk of Court and held that position for 25 years, retiring in 2019. During his time with the Clerk's office, I oversaw the construction of an up-to-date offsite Records Center and supervised the transition from paper records to digital.

Archie has been a FRMA member for many years, serving as Director of Membership, Administration and President. He was honored to receive the President's Award in 2023.

Session Time: **9:30 – 10:45 a.m.**

Session Title: **Pathways to Excellence: Mastering the Journey**

Description: Are you ready for the next level in your career? The objective of this presentation is to provide background on the various certifications offered by

the Institute of Certified Records Managers ("ICRM") and then launch into a panel discussion that includes panelists who will openly share their personal journeys through the certification process and how it has helped them professionally. The knowledge that will be shared on this panel will aid anyone who is considering becoming ICRM certified.

Presenters: **Tim O'Toole, CRM, IGP**

Bryan Lefils, CRM

Matt Daugherty, CRM, SML, Inc.

Bios: *Tim O'Toole*

Tim O'Toole, CRM, IGP, is the Director of Records Management for the Central Florida Expressway Authority ("CFX") and has over 25 years of RIM experience. The majority of his career has been exclusively in local government where he has been creating, implementing, and managing RIM programs. As the Director of Records Management, Tim is responsible for establishing and maintaining an effective RIM program, advising senior management on RIM issues and training CFX employees on RIM principles.

In addition to his professional career, Tim has held many leadership roles over the course of his career serving as the President for his local ARMA Chapter in Orlando and at one time served as the SE Region Director for ARMA International. He also is a past President of the Florida Records Management Association ("FRMA") and is currently serving as the President of the Institute of Certified Records Managers ("ICRM").

He graduated from the University of Central Florida (Go Knights!) with a Bachelor of Science in Business Administration and currently holds the esteemed designations of Certified Records Manager ("CRM") and Information Governance Professional ("IGP").

Bryan Lefils

Bryan LeFils, CRM, is the Records & Surplus Property manager for the Orange County Comptroller's Office. Mr. LeFils has 15+ years of Records & Information Management experience in local government where he has been creating, implementing, and managing RIM programs. Bryan is responsible for establishing and maintaining an effective RIM program, advising senior management on RIM issues and training County employees on RIM principles.

In addition to his professional career, Bryan has held many leadership roles serving the local ARMA Orlando Chapter and for various committees with the Institute of Certified Records Managers (ICRM). He graduated from the University of Central Florida (Go Knights!) with a Bachelor of Science in

Business Administration and currently holds the designation of Certified Records Manager (CRM) with the Institute of Certified Records Managers.

Matt Daugherty

Matt Daugherty is a Certified Records Manager with over twenty-three years of professional experience managing Florida's Public Records.

As Executive Vice President of SML, Inc., Matt assists governmental clients with the development and maintenance of agency records management programs through policy and procedure development, training, and hands-on records management.

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