NYALGRO SCHOOL – June 4 – 7, 2023
Hotel Ithaca – Ithaca, NY
"The Art of Records Management"

Sunday, June 4	4:00 PM – 6:00 PM	Registration – Hotel Lobby
	7:30 PM – 9:00 PM	Welcome Reception – North Ballroom
Monday, June 5	7:00 AM – 8:30 AM	Breakfast – Ithaca/Cayuga
	Noon – 1:00 PM	Lunch – Ithaca/Cayuga
	6:00 PM – 7:00 PM	President's Cocktail Hour – Ithaca/Cayuga
	7:00 PM – 9:00 PM	Banquet/Award Ceremony – Ithaca/Cayuga
Tuesday, June 6	7:00 AM – 8:30 AM	Breakfast – Ithaca/Cayuga
	Noon – 1:30 PM	Lunch/Business Meeting – Ithaca/Cayuga

MONDAY, June 5, 2023

8:30 AM – 9:00 AM
SENECA

New Member/First Time Attendee Orientation
June Patterson, NYALGRO Board Member, Town Clerk, Town of Highlands
Matthew Shaler, NYALGRO Board Member, RMC, Madison County
Dina Falcone, NYALGRO Board Member, Town Clerk, Town of Lysander

New member? First time attending a NYALGRO conference? Come to this session to get a quick orientation about NYALGRO and what we offer to you as a member. Meet other first-time attendees and network.

9:00 AM – 10:30 AM
NORTH BALLROOM

FOIL – Freedom of Information Law
Kristin O'Neill, Assistant Director, Committee on Open Government

This session provides an opportunity for attendees to learn more about a government agency's rights and responsibilities in relation to the Freedom of Information Law. The class will focus on the areas of concern most relevant to you, so bring your questions, concerns, and unusual situations to discuss and to receive advice and guidance from the Committee on Open Government.

11:00 AM – 12:00 PM
SENECA

Your Records After COVID
Monica Hauck-Whealton, RAO, NYS Archives

Local government records documenting their response to the COVID-19 pandemic may contain valuable information of interest to government leadership, emergency management staff, and researchers. Ensuring that these records are retained appropriately is complicated not only by the increased relevance of certain common record types but also by the shift to telecommuting for many staff and resulting storage of records in employees' homes.

This session will discuss applying appropriate retention schedule items to records documenting pandemic response, identifying records of enduring historical value, and managing records in a remote environment.

11:00 AM – 12:00 PM
NORTH BALLROOM

Paper Treasures: Information Contained in Historical Documents and Preservation for Public Use
Tricia Noel, Executive Director and Curator - Yates County History Center

This session will cover the kind of information one can obtain from historical documents and the best practices for storing and retaining them, and how they can be of use to the public for genealogical, architectural, or other types of historic research.

1:00 PM – 2:30 PM
NORTH BALLROOM

Electronic Document Records Systems (EDRS) and Laserfiche
Colleen Rathbun, Deputy Town Clerk, Town of Queensbury
Desiree Potvin, NYALGRO President, Town/Village Clerk, Town/Village of Woodbury

"Many people believe that an electronic content management system (ECM) is merely an electronic document imaging system, but it is actually a software system that allows for the creation, indexing, management, and retrieval of documents in various formats through a single interface." (NYS Archives)

This session will walk you through a content management system, starting with the basics to the more elaborate records management program. You will learn how to organize your records and manage digital records retention.

1:00 PM – 2:30 PM
SENECA

Back to Basics - Records Management 101
Dina Falcone, NYALGRO Board Member, Town Clerk, Town of Lysander

Are you a new Records Management Officer (RMO)? Records Management is a method for controlling the creation, maintenance, acquisition, and disposal of information regardless of its format. This session will focus on the best procedures and practices for maintaining, storing, indexing, and destroying your records as well as offering hints to make the job a little easier.

3:00 PM – 4:30 PM
NORTH BALLROOM

Municipal Breakouts - Round-Table Networking
NYALGRO Board Members and NYS Archives RAOs

Attendees will break out into groups based on municipal type – county, town, village/city, fire district, school district. Each group will have personal access to NYALGRO members and RAOs from the NYS Archives. An interactive opportunity to ask questions and share ideas on records management specific to your type of government.

TUESDAY, June 6, 2023
9:00 AM – 10:00 AM
SENECA

LGRMIF Ins and Outs - Key Considerations in Writing Your Grant Application
Michael Martin, *RAO - Towns, NYS Archives*

This session will provide some guidelines for the application process of the LGRMIF grant program. This program provides funds to improve the management of records. This can range from a first-time inventory to an intricate content management system. The session will include some suggestions to help attendees write a successful grant application.

9:00 AM – 10:00 AM
NORTH BALLROOM

Creating, Modifying, and Applying a Records Management Policy
Desiree Potvin, NYALGRO President, Town/Village Clerk, Town/Village of Woodbury

When was the last time you reviewed your records management procedure policy? Do you have a records management procedure policy? This session will provide you with suggestions and guidance on how to create or maintain a records management procedure policy for your municipality that will ensure the lifecycle of your records is followed consistently, from start to finish. A sample policy used by the speaker will be provided.

10:30 AM – 12:00 PM **NORTH BALLROOM**	**Schoharie County's Recovery from Hurricane Irene and Tropical Storm Lee** *Hon. M. Indica "Indy" Jaycox, Schoharie County Clerk* *Nicole Doherty, Records Retention Coordinator, Schoharie County* Schoharie County and the surrounding area sustained heavy damage when Hurricane Irene and Tropical Storm Lee pounded into the area within ten days of each other in 2011. Several feet of water poured into the lower levels of several county buildings. This session will detail how Schoharie County recovered from this records management nightmare.
10:30 AM – 12:00 PM **SENECA**	**Inherited Records Mess? - Tackling Records Management Messes** *Maria McCashion, Records Advisor, NYS Archives* It's easy to get overwhelmed dealing with a room full of stacked boxes, a network with no filing system, or poorly arranged records series. Faced with all three, you might want to change careers! This session will help you form a plan of attack. It will look at some common records messes and provide tools and ideas for you and others to help identify issues and build a road map to make and implement changes.
1:30 PM – 3:00 PM **NORTH BALLROOM**	**Navigating a First Amendment Audit** *Lori Mithen-Demasi, General Counsel, Association of Towns* First Amendment auditors are individuals who use recording equipment and smart phones to record public property, government operations and interactions with public officers and employees. In this session we review basic First Amendment principles and case law associated with the use of recording equipment on public property. In addition, we'll discuss some considerations for creating reasonable time, place, and manner rules regarding the use of recording equipment and suggestions for interacting with individuals seeking to use recording equipment in public facilities.
1:30 PM – 3:00 PM **SENECA**	**Leadership – How to Promote Yourself and Your Purpose** *Connie Brown, Former President/CEO United Way of Greater Niagara* *Megan Sokolow, NYALGRO Board Member, Records Management Inventory Supervisor, Livingston County* *Vicki Switzer, Operations Manager, Burn Boot Camp* Recent scientific studies suggest that leadership is 30% genetic and 70% learned. As records managers we find ourselves in many roles; being a leader is one. You may find you are supervising staff, running a meeting, or initiating record management policies, to name a few. In this panel session three leaders will discuss their experiences cultivating and promoting their programs by reaching out and motivating staff and stakeholders. Each will explain their trials and tribulations in each phase of their careers. One panel member is a seasoned leader with years of knowledge and experience; one is new in her position of leadership and is in the process of learning and developing their skill set; and one is a novice records manager who successfully has begun to regenerate a dying records management program. This truly awesome team is open for questions and experiences that you may wish to ask or share.