



BEYOND THE BOX: THE FUTURE OF RECORDS MANAGEMENT

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Topics for Discussion

RECORDS MANAGEMENT IN 2026 & BEYOND

The changing role of the City Clerk, growing responsibilities, expectations & importance

THE EVOLVING PUBLIC RECORDS REQUEST ENVIRONMENT

Request trends, legal complexity, First Amendment auditors, and AI records requests

TECHNOLOGY & INFORMATION GOVERNANCE

Electronic systems, AI, Your place at the table

LEADING THE MODERN RECORDS PROGRAM

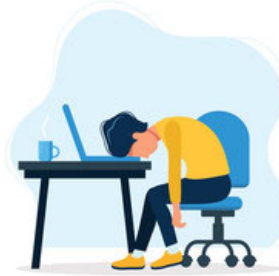
Assessment, advocacy, next steps, and resources

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Records Management in 2026 & Beyond

The Realities for Clerk's as Records Managers

- More Records
- More Technology
- More Requests
- More Complexity
- More Scrutiny
- Less Time / Staff / Resources



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The Role of the City Clerk is Expanding

Today's Records Managers Are Expected To Be...

- **Legal Experts** - Read & Understand the Law
- **Public Relations / Therapist** — People & Public Interaction
- **IT** - Manage Technology
- **Technology Innovationists** - Navigate AI & Emerging Tools
- **Financial Planners** - Be Creative with Limited Resources
- **Advocates** - Make the Case for Records Management



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Pressure Plus Purpose

Safeguarding an Important Tradition

- Good Government
- Transparency & Trust
- 100+ Year Tradition

“A public office is a public trust. The people shall have the right to secure and sustain that trust against abuse.”



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The Clerk as a Necessary Voice

Records Reveal Process

- Records reflect the workflows and decisions
- Disorganized records often point to disorganized processes

Requests Reveal Public Interest

- What the public is focused on
- Which issues are drawing increased scrutiny

Patterns Reveal Risk

- Repeated problems often indicate a systemic issue—not an isolated mistake



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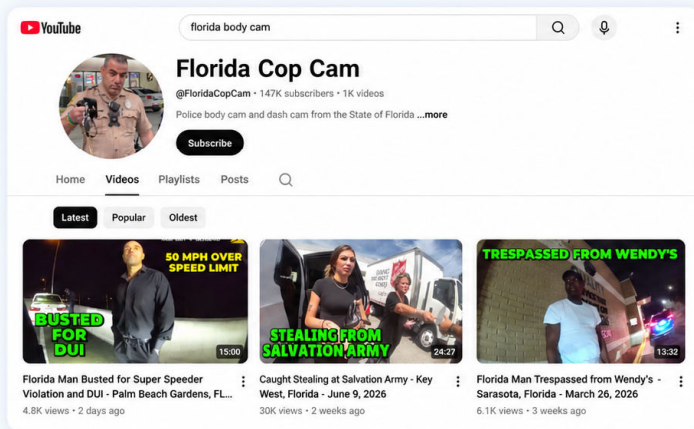
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Bodycam Footage

One of the Most Requested Types of Public Records



Example shown: public YouTube channel screenshot.



High public interest



Often time-intensive to review



May require redaction before release

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Evolving Public Records Request Environment



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Can you draft a professional public records request to send to a Florida municipality regarding a land development project. The request should include and indicate with specificity any document types that would be maintained by a municipality that would be connected to a land development project agency-wide.

- 29 Seconds to Draft
- Resulted in a 13-page Request
- P&Z, Building, Fire, Legal, Finance, City Clerk, Communications, Code, and Public Works
- Professionally written with legal citations.

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Can you send this records request to a specific city email every Monday morning at 8:00am?

Yes. I can set it up to send **every Monday at 8:00 AM Eastern** using the public-records request we drafted above.

Send me the **city email address** you want it sent to. I'll use a subject such as **"Public Records Request – [Project Name]"** and schedule the recurring Monday email.

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First Amendment Auditors

Who are they?

- Individuals or groups asserting/testing First Amendment rights.
- Private citizens

What are they Auditing

- Access & Record in Public Spaces
- Monitor & Participate
- Access Government Information (i.e. Records)

Social Media Use

- Primarily YouTube



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Responding to Increased Complexity

Upholding Access in a More Demanding Environment

- **Tighten the Process**
Written policies, clear procedures, staff training, and consistent application
- **Reduce What Must Be Managed**
Systematic disposition of eligible records
- **Improve Records Organization**
Better and more consistent organization across departments and systems
- **Use Technology Strategically**
Tools that improve search, retrieval, coordination, and records management
- **The answer is not to restrict access — it is to improve how the city manages information.**

Q: Other Strategies?

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Technology & Information Governance

More Systems. More Records. More Responsibility

- **Technology Is Everywhere**
Business Systems, Communication, Content & Cloud, Emerging tools
- **Public Records Law Applies**
Content not Platform
- **Responsibility Is Fragmented**
Decentralized technology requires centralized records oversight



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Technology & Information Governance

Information Governance

A strategic framework of policies, roles, standards, and processes that ensures information is properly created, managed, protected, used, and disposed of in a compliant and accountable manner.

IG integrates:

Records Management, Information Security, Business Continuity, Privacy and Confidentiality, Legal Readiness

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Building an Information Governance Group

Who Should Be Involved?

- City Clerk / Records Management
- Information Technology
- Legal
- Risk
- Emergency Management
- Management
- Key Department Representatives

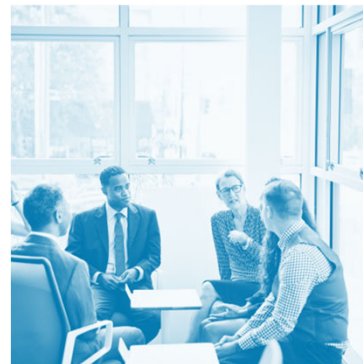


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Building an Information Governance Group

What Should the Group Do?

- Discuss information issues before they become problems
- Coordinate policies, technology, access, retention, and risk
- Bring records requirements into technology.
- Create a regular place for shared discussion, shared problem-solving, and better coordination.



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The Clerk Needs a Seat at the Table

What “A Seat at the Table” Means

- Included Early - Asked for Input
- Be the Voice for Records Management

What the City Clerk Brings

- Public Records Law Concerns – Access, Retention, Disposal, and Preservation

Where the Clerk Should Be Involved

- Technology procurement and implementation
- Decision that effect Public Records Management

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Technology & Information Governance

Every New System Creates Records Questions

- Can records be easily **searched and retrieved**?
- Can **retention** requirements be applied?
- Can eligible records be **systematically disposed** of?
- Can records be **exported** when needed for migration or litigation?
- Is important **metadata** captured & preserved?
- Read **Rule 1B-26.003, Florida Administrative Code**

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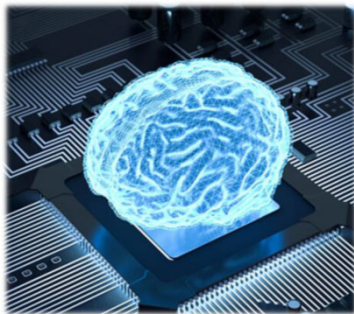
Q: How Well Is Your City Managing Electronic Records?

- What systems are being used across your city?
- Who is responsible for managing the records within those systems?
- Are retention and disposition built into those systems?
- How confident are you that records can be found and produced when needed?



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Artificial Intelligence & Records Management



Two Perspectives

Records Management for AI

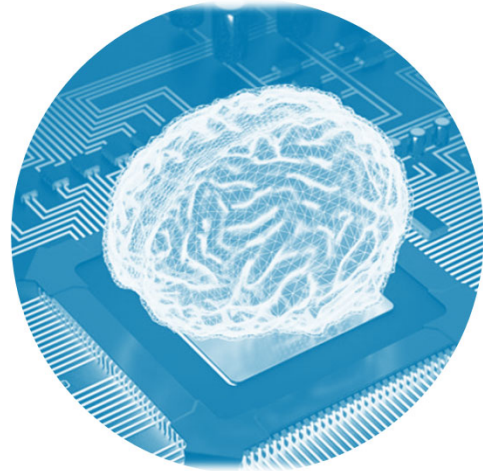
- Good AI depends on good information
- Poor-quality, outdated, or duplicative information produces poor results

AI for Records Management

- Research and summarization
- Drafting policies, procedures, and training
- Classification and organization
- Identifying duplicates and patterns

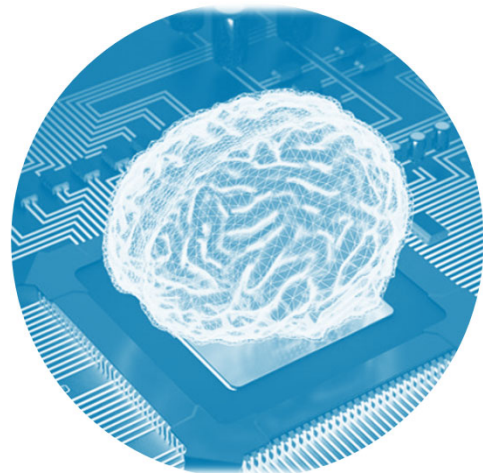
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How is AI Used in Your City?



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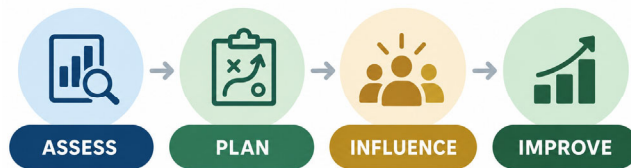
How Involved Are You With Digital Records Management?



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From Managing Records to Leading the Program

The modern Clerk's role is not simply to respond to records problems — it is to shape the program that prevents them.



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ASSESS: Take Stock of the Program

Look Across the Entire Program

- **Policies & Procedures** — current and actually followed?
- **Access & Requests** — problems or delays?
- **People & Training** — understanding and consistency?
- **Storage** — organized and accessible?
- **Technology** — controls and content managed as Public Records?
- **Retention & Disposition** — schedules applied? regular disposal?

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PLAN: Decide Where You're Going

Prioritize — focus first on the highest-risk or highest-impact problems

Set Goals — define what improvement should look like

Assign Responsibility — identify who owns each action

Build Partnerships — determine where IT, Legal, Management, and departments are needed

Phase the Work — short-term wins, medium-term improvements, long-term modernization

Measure Progress — document accomplishments and revisit priorities regularly

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INFLUENCE: Build Support for the Program

Speak the Language of Leadership

- **Risk** — reduce legal, compliance, and operational exposure
- **Efficiency** — improve retrieval, workflows, and staff productivity
- **Cost** — reduce unnecessary costs
- **Service** — improve access and responsiveness to the public

Build Support

- Develop relationships across departments and management
- Use real examples and program data to demonstrate needs
- Ask for **specific** resources, decisions, or support

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Policy Windows: Challenges Create Opportunity

A Policy Window Opens When...

THE PROBLEM IS VISIBLE - Something is creating pressure, risk, cost, or public attention

A SOLUTION IS AVAILABLE - Records management can offer a practical response

LEADERSHIP IS PAYING ATTENTION - There is organizational willingness to act

Current Policy Windows



Increasing Public Records Requests

Rising volume, complexity & workload



AI Implementation

New tools, new information risks



Budget / Efficiency Pressures

Need to do more with less



Cybersecurity & Information Risk

Protection, access & accountability



Technology Modernization

New systems create records questions



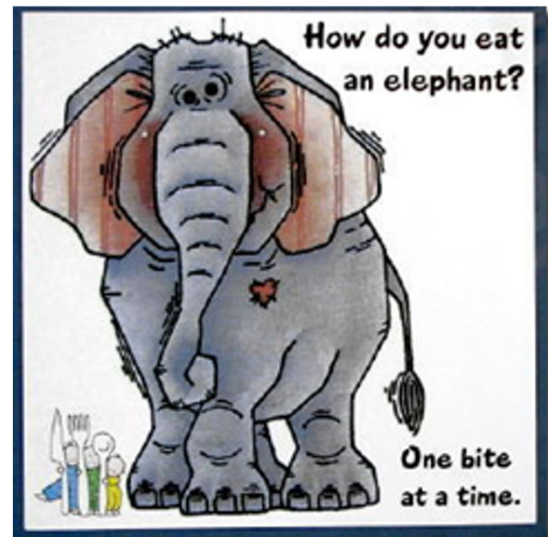
These moments create opportunities to strengthen records management.

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IMPROVE: Turn Opportunity Into Progress

Records Management is Project Management

- One Bite at a Time
- Build Improvements Into Daily Work
- Use Technology Strategically
- Fix the Process, Not Just Symptoms
- Keep Improving — Don't Wait for Perfect
- Show-Off Your Success



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Share a Success?



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What is the Future of Records Management?

The Environment Changes. The Foundation Remains.

- The principles of records management are enduring.
- Same principles. New challenges.
- More records. More technology. More scrutiny.
- Strong programs adapt.
- Public trust remains the purpose.

Build the foundation well, and the program can adapt to whatever comes next.



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Resources to Support Your Program

SML, Inc. - Website: <https://www.smlinfo.net/>

Florida Association of City Clerks (FACC) –

Website: <https://www.floridaclerks.org/>

Florida Institute of Government – Website: <https://iog.fsu.edu/>

Florida Department of State - Division of Library & Information Services

Website: <https://dos.fl.gov/library-archives/records-management/>

Florida Attorney General –

Website: <https://www.myfloridalegal.com/open-government>

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Resources to Support Your Program

Florida Records Management Association – Website: <https://frma.org/>

Institute of Certified Records Managers – Website: <https://www.icrm.org/>

ARMA – Website: <https://arma.org/>

NAGARA - Website: <https://www.nagara.org/>

AIIM – Website: <https://www.aiim.org/>

National Archives and Records Administration (NARA) –
Website: <https://www.archives.gov/>

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Questions?

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Thank You!

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