



REACHING FOR THE FUTURE

FEBRUARY 19-20, 2026

Pre-Conference CRA/CRM
Exam Prep Workshop
February 18, 2026

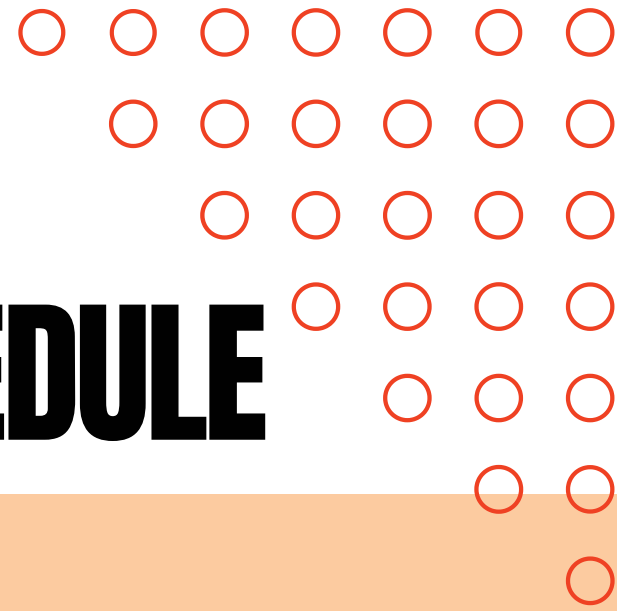
ARMA Chapters:

CHATTANOOGA

FLORIDA GULF COAST | JACKSONVILLE

ORLANDO | PALM BEACH-TREASURE COAST

armasunshine.org



PRE-CONFERENCE SCHEDULE

February 18th

7:30 AM - 7:00 PM

7:30-
8:00 AM

Registration & Breakfast

Check-in and networking.
Hotel Lobby - Breakfast for hotel registered guests only

8:00-
10:00 AM

Parts 2, 3 & 4

Tim O'Toole
Cypress 4 & 5

10:00-
10:15 AM

Break

Refreshments provided
Palms

10:15-
12:30 PM

Parts 2, 3 & 4

Bryan LeFils
Cypress 4 & 5

12:30-
1:30 PM

Lunch

Lunch on your own

1:30-
2:25 PM

Part 1

Tim O'Toole
Cypress 4 & 5

2:30-
3:30 PM

Part 5

Bryan LeFils
Cypress 4 & 5

3:30-
3:45 PM

Break

Refreshments provided
Palms

3:45-
4:45 PM

Part 6

Tim O'Toole
Cypress 4 & 5

5:00-
7:00 PM


Welcome Reception & Complimentary Happy Hour & Heavy Hors D'oeuvres

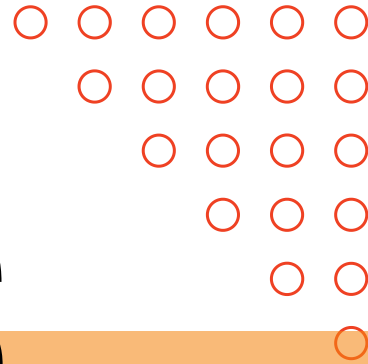
The Cove



CONFERENCE SCHEDULE

February 19th

TIME	TECH DEVELOPMENT TRACK	LEADERSHIP DEVELOPMENT TRACK
7:30 - 8:30 AM	Check-In (Breakfast for hotel registered guests only) Hotel Lobby	
8:30 - 10:30 AM	Panel: From Data Overload to Control: Tackling RIM and IG Pain Points Cody Mortimer, Amanda Rodi, Tera Ladner, Scotty Swafford, Jessica VanTroost Magnolia	
10:30-11:00 AM	Break (Refreshments Provided) Palms D - G	
11:00 - 12:00 PM	From ROT To Results: Smart Strategies for a Leaner, Cleaner Information Environment Cody Mortimer and Amanda Rodi Cypress 4 & 5	Strengths Based Leadership Prita Chhabra Magnolia
12:00 - 1:30 PM	Conference Lunch Palms D-G	
1:30 - 2:25 PM	Zen and the Art of Public Records Management Nick Dazio and Arthur Mugan Cypress 4 & 5	From Pushback to Progress: Helping Teams Thrive Through Transition Jessica VanTroost Magnolia
2:30 - 3:25 PM	Infosec Meets IG - Protecting Information Across the Lifecycle Tera Ladner Cypress 4 & 5	Get a Seat at the Table Julia Neumann Magnolia
3:30 - 4:00 PM	Break (Refreshments Provided) Palms D - G	
4:00 - 5:00 PM	From Paper to Insight: Real-World Lessons in Digital Transformation Across Government and Industry Michael Cooney - Case Study by ImageOne Cypress 4 & 5	The Human Element of Cyber Breach and Why Humans and Their Organizations Continue to Struggle with Cyber Defense Tony Perri Magnolia 
5:00 - 7:00 PM	Networking Reception & Complimentary Happy Hour & Heavy Hors D'oeuvres The Cove	



PANEL SPEAKERS



Scotty Swafford
Senior Compliance Analyst



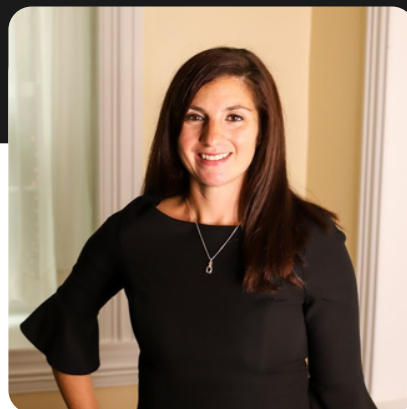
Tera Ladner
Deputy Global CISO



Jessica VanTroost
Chief Strategy and
Operations Officer



Cody Mortimer
Principal Consultant

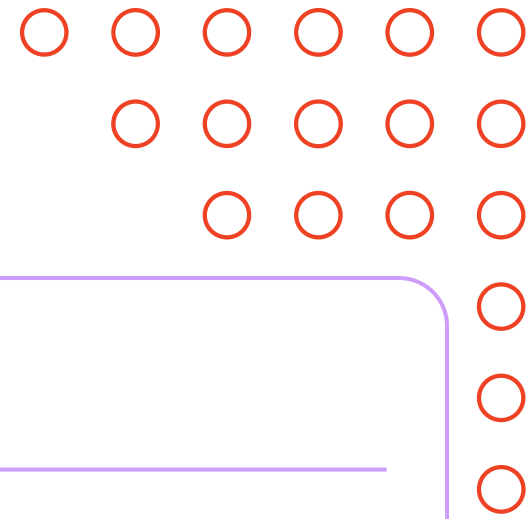


Amanda Rodi
Strategic Business Process
Leader



FROM DATA OVERLOAD TO CONTROL: TACKLING RIM AND IG PAIN POINTS

February 19, 2026 | **At 8:30am**



PANEL SPEAKER

SCOTTY SWAFFORD

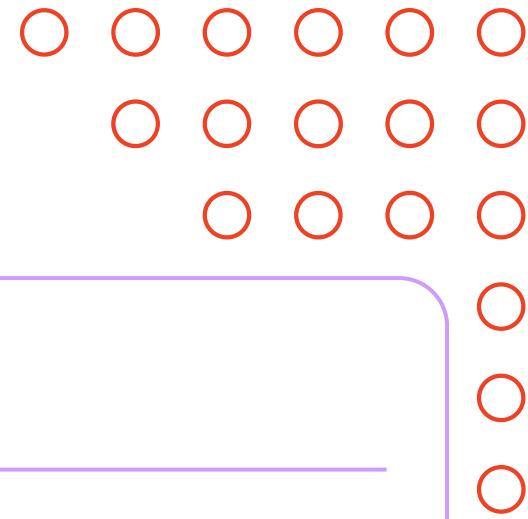
Senior Compliance Analyst

SPEAKER BIO

Scotty E. Swafford is a Certified Information Professional with 30+ years in information governance and compliance. At BlueCross BlueShield of Tennessee, he drives initiatives that enhance data integrity and operational resilience. An active ARMA leader, he is committed to advancing RIM best practices and expanding expertise in M365 Purview.



For more info connect on LinkedIn → [Scott Swafford](#)



PANEL SPEAKER

TERA LADNER

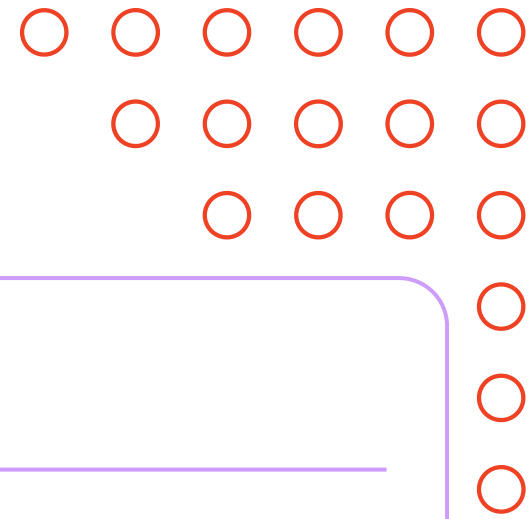
Deputy Global CISO

SPEAKER BIO



Tera Ladner is Deputy Global Chief Information Security Officer at Aflac, leading enterprise cybersecurity strategy, planning, and program oversight. With 16+ years in information governance, she previously served as Group VP at SunTrust (now Truist) and President of ARMA International. She holds CRM, IGP, and CISM certifications and a J.D. from Georgia State University. Tera is an active industry leader and frequent conference speaker.

For more info connect on LinkedIn → [Tera Ladner](#)



PANEL SPEAKER

JESSICA VANTROOST

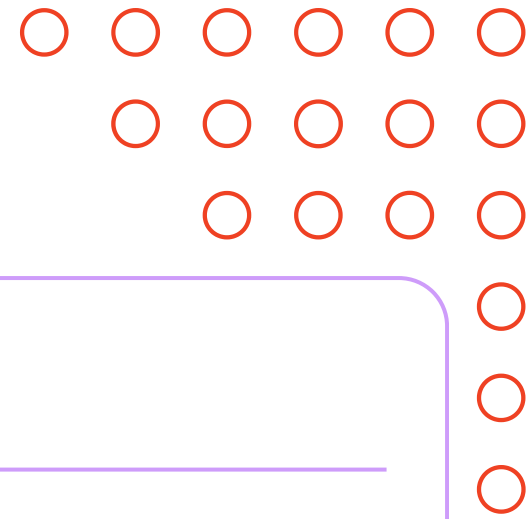
Chief Strategy and Operations Officer

SPEAKER BIO



Jessica VanTroost has 19 years of experience in legal administration, overseeing recruiting, operations, HR, and special projects at McGlinchey. A longtime ALA leader and current International Board Director, she co-founded the “Ministry of Fun” to foster engagement and collaboration. Known for her empathy and adaptability, Jessica speaks nationally on resilience, organizational change, and guiding teams through challenging times.

For more info connect on LinkedIn → [Jessica VanTroost](#)



PANEL SPEAKER

CODY MORTIMER

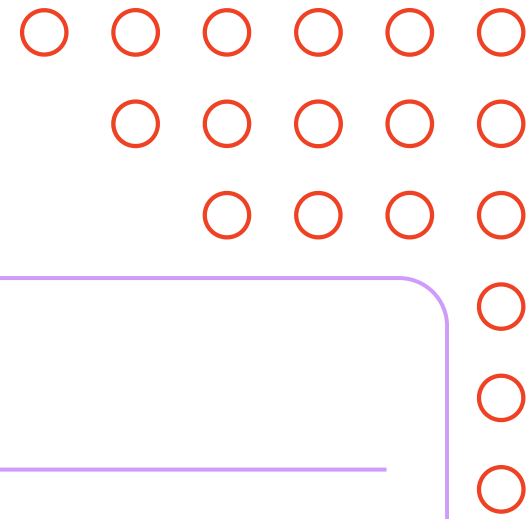
Principal Consultant

SPEAKER BIO



Cody is a strategic Records & Information Management and eDiscovery leader with expertise in global program development, risk mitigation, and technology modernization. He partners with clients to enhance RIM programs, manage litigation resources, and ensure regulatory compliance. Known for his proactive approach, Cody helps organizations build defensible, efficient programs that support litigation readiness and overall business resilience.

For more info connect on LinkedIn → [Cody Mortimer](#)



PANEL SPEAKER

AMANDA RODI

Strategic Business Process Leader

SPEAKER BIO



Amanda Rodi is the Managing Member of Innovative Development, LLC, a global consulting firm specializing in the design and implementation of repeatable, reliable, and defensible eDiscovery and Records Management Solutions. She leads Innovative Development from a People Centric Approach focused not only on processes but client and team engagement from the start of a project. Tools don't create great RIM programs; people make great RIM Programs.

For more info connect on LinkedIn → [Amanda Rodi](#)

From ROT to Results: Smart Strategies for a Leaner, Cleaner Information Environment



Cody Mortimer
Speaker



Amanda Rodi
Speaker

This presentation will provide a practical overview of ROT, why retaining it creates operational, legal, and security risks, and how effective disposal supports compliance, efficiency, and information governance. Through definitions, real-world examples, and interactive exercises, participants will learn how to distinguish official records from non-records, apply retention and disposal principles, and implement consistent ROT clean-up practices within their organization.



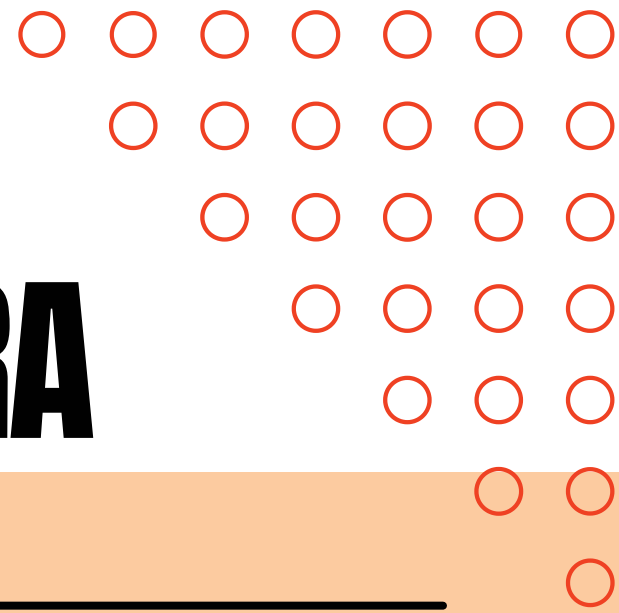
Date
February 19



Time
11:00am - 12:00pm



Location
Cypress 4 & 5



PRITA CHHABRA



Site Director for
Public Allies Central
Florida

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About

Prita Chhabra is a leadership and community development professional dedicated to empowering others. A celebrated singer and former AmeriCorps Public Ally, she earned an MBA and has been recognized for her creative service initiatives. As Site Director for Public Allies Central Florida, she leads programs that inspire emerging leaders across the region.

Strengths Based Leadership

In this session, participants will explore their individual strengths and learn how to apply them more intentionally in their current roles. Through guided reflection and practical discussion, attendees will gain a clearer understanding of what they naturally do well and how to leverage those strengths to improve performance, collaboration, and leadership effectiveness—both for themselves and for the people they manage.



Date
February 19



Time
11:00am - 12:00pm



Location
Magnolia

Zen and the Art of Public Records Management

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Nick Dazio
Speaker

Nick Dazio, CRM, is the General Manager of Records and Information Management for the City of Sarasota with more than 18 years of experience in local government. A Certified Records Manager and U.S. Army veteran, he leads digital transformation efforts, serves on the Board of Directors for the Florida Gulf Coast ARMA chapter, and mentors future RIM professionals. Outside of work, Nick enjoys growing hot peppers for homemade hot sauce, spending time with his three dogs, and indulging his love of horror movies.

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Arthur Mugan
Speaker

Arthur Mugan, CRM, has worked for seven years as the Public Records Supervisor for the City of Sarasota, Florida establishing and refining the public records program. He holds a Graduate Certificate in Records & Information Management from LSU and a Certified Records Manager designation from the ICRM. In his free time, Arthur enjoys adventures with his dog Abilene, road cycling, and extreme metal music.

This session explores the evolution of a modern public records program through a mindful, practical lens. The session walks through the real-world journey of building, maturing, and sustaining a public records program using the Principles Maturity Model (PMM). Blending professional experience with humor and relatable scenarios, the presentation addresses common challenges such as compliance, accountability, transparency, technology adoption, and staff engagement. Attendees are invited to consider “end or transcend” moments, everyday decisions that can either erode trust or strengthen governance, and learn how thoughtful responses, strong partnerships, and leadership can elevate a program beyond basic compliance. The session concludes with forward-looking strategies to monitor, maintain, and maximize public records programs while remaining adaptable in an evolving legal and technological landscape.



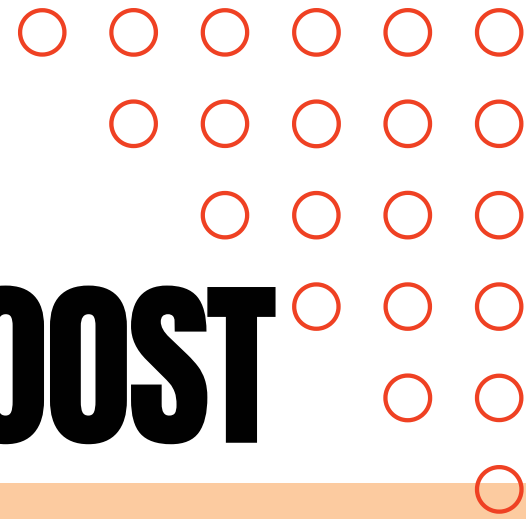
Date
February 19



Time
1:30pm - 2:25pm



Location
Cypress 4 & 5



JESSICA VANTROOST



From Pushback to Progress: Helping Teams Thrive Through Transition

Chief Strategy and
Operations Officer

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Change is inevitable, but resistance doesn't have to be. In this session, Jessica VanTroost draws on real-world experience to explore why teams push back during times of transition and how leaders can turn uncertainty into engagement. Participants will learn practical strategies for communicating change, building trust, and guiding teams through disruption in a way that promotes resilience, alignment, and forward momentum.



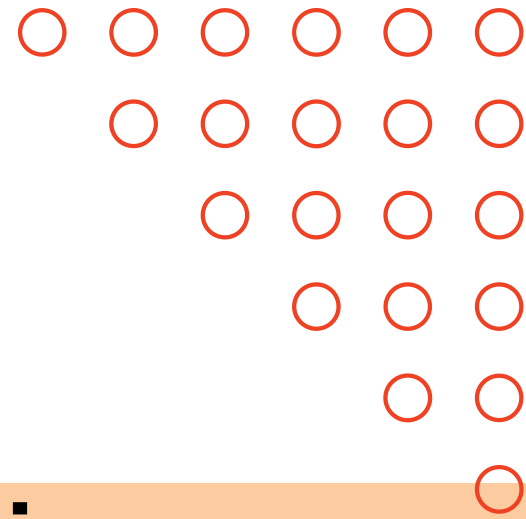
Date
February 19



Time
1:30pm - 2:25pm



Location
Magnolia



TERA LADNER



Deputy Global CISO

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Infosec Meets IG - Protecting Information Across the Lifecycle

In a data driven world accelerated by the rise of AI, information security and information governance can no longer afford to be siloed. This session explores how integrating both functions creates a robust approach that protects data and reduces organizational risk. We will discuss how security controls, privacy requirements, and regulatory compliance intersect throughout the information lifecycle. Practical strategies for building shared accountability, improving data visibility and hygiene, and enabling a defensible position will be shared. Whether you focus on information security, legal, risk, privacy or data governance, this session will provide a practical framework for collaboration. Learn how to become a strategic enabler rather than just another compliance check box.



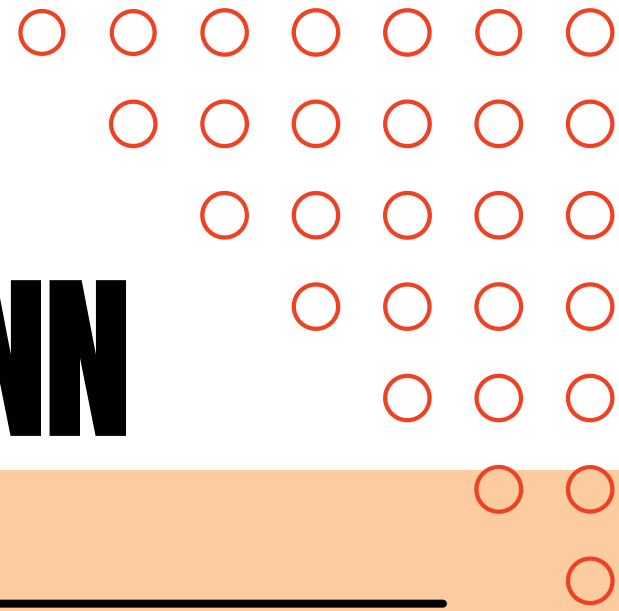
Date
February 19



Time
2:30pm - 3:25pm



Location
Cypress 4 & 5



JULIA NEUMANN

Director of Marketing
& Communications

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About

Julia Neumann, Marketing and Business Development Director at Dean Mead, specializes in leadership communications and brand strategy. She helps leaders articulate their vision, elevate organizational presence, and drive engagement. Julia holds a Master's in Consumer and Marketing Research and a B.A. in Advertising from the University of Florida.

Get a Seat at the Table

RIM, Information Governance, and compliance professionals often do critical work but struggle to be seen as strategic leaders. This session focuses on how to move beyond task-based work to build influence, credibility, and visibility across the organization.

Participants will learn how to frame their work in terms of business value and risk reduction, strengthen key relationships, and communicate more effectively with leadership. Attendees will leave with a practical 90-day action plan to increase their impact and position themselves as trusted business partners.



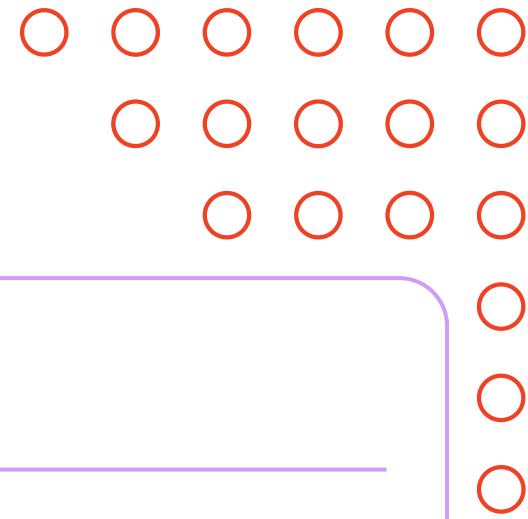
Date
February 19



Time
2:30pm - 3:25pm



Location
Magnolia



PLATINUM PLUS SPEAKER

MICHAEL COONEY

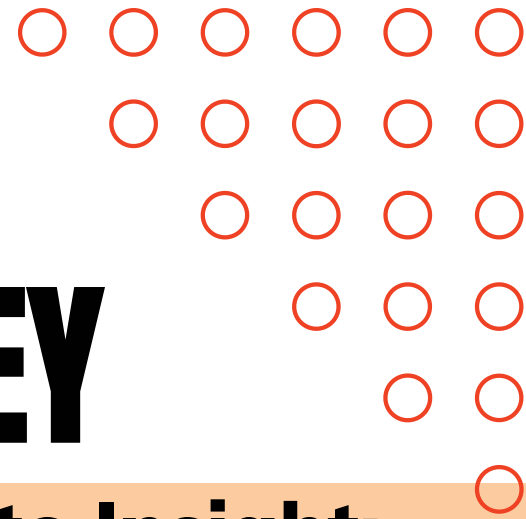
Executive Director of Sales and Operations

SPEAKER BIO

Michael Cooney is Executive Director of Sales and Operations at Image One Corporation in Tampa, Florida. With 20+ years in information management and document digitization, he helps organizations modernize workflows and improve data accessibility. Michael combines technical expertise and strategic vision to drive efficiency, value, and Image One's continued growth.



For more info connect on LinkedIn → [Michael Cooney](#)



MICHAEL COONEY



Case Study: From Paper to Insight: Real-World Lessons in Digital Transformation Across Government and Industry

In this session, Michael Cooney, Executive Director of Sales and Operations at Image One Corporation, will share two real-world stories of organizations that successfully transitioned from paper-based, manual processes to fully digital, intelligent information management. Through case studies from both the public and private sectors, attendees will learn how government and industrial organizations are leveraging technology to streamline operations, enhance compliance, and unlock the hidden value of their information — all without losing sight of people and processes.

Executive Director of
Sales and Operations

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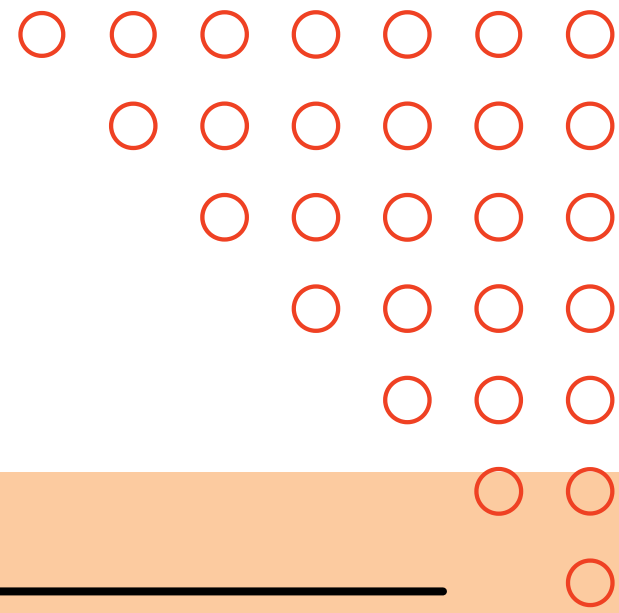
Date
February 19



Time
3:45pm - 4:45pm



Location
Cypress 4 & 5



TONY PERRI

CEO/Founder of
Santa Rosa Software

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About

Tony Perri is founder and CEO of Santa Rosa Software and Perri Marketing, Inc., a global technology marketing firm serving SMB software vendors. A technology marketer since 1997, his expertise spans data security, infrastructure, ERP, and CRM. Tony served as an IBM Champion for IBM z/OS from 2022–2024.

The Human Element of Cyber Breach and Why Humans and Their Organizations Continue to Struggle with Cyber Defense

More than 60% of today's data breaches involve a human element—yet Business, Operations, IT, and HR too often operate in disconnected silos when it comes to cyber defense. In this session, a seasoned research writer and cybersecurity speaker draws from real-world breach investigations to show how communication gaps, onboarding practices, and everyday business processes can either strengthen or undermine security. Attendees will learn how stronger cross-functional collaboration, smarter internal communications, and awareness of evolving privacy, data security, and AI regulations can reduce risk and better protect their organizations.



Date
February 19



Time
4:00pm -5:00pm



Location
Magnolia

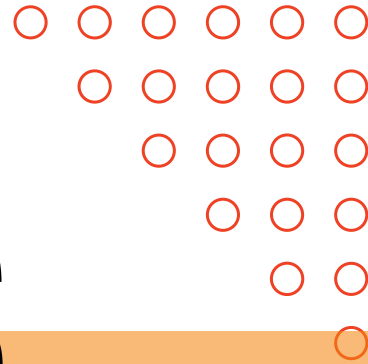


CONFERENCE SCHEDULE

February 20th

TIME	LEADERSHIP DEVELOPMENT TRACK	TECH DEVELOPMENT TRACK
7:30 - 8:30 AM	<p>Check-In (Breakfast for hotel registered guests only) Hotel Lobby</p>	
8:30 - 10:00 AM	<p>Panel: Embracing Tomorrow: Innovating RIM and IG for a Digital Future Cody Mortimer, Amanda Rodi, Tera Ladner, Andrew Ysasi, Kaan Volkan and Nichole Mooney, Esq. Magnolia</p>	
10:00-10:30 AM	<p>Break (Refreshments Provided) Palms D - G</p>	
10:30 - 11:30 AM	<p>AI: Deep Dive Post-Panel Discussion Andrew Ysasi Cypress 4 & 5</p>	<p>Archiving Doesn't Cut It Kaan Volkan Magnolia</p>
11:30 - 11:55 PM	<p>ARMA State of the Association Magnolia</p>	
11:55 - 12:15 PM	<p>Platinum Sponsor Magnolia</p>	
12:15 PM	<p>Conference Wrap-Up & Farewell Grand Prize Drawing - Must be present to Win! Stamp Game Drawing - Must be present to Win! Magnolia</p>	





PANEL SPEAKERS



Andrew Ysasi

Vice President of Advocacy



Kaan Volkan

ARMA/RIMPA Speaker



Nicky Mooney

Attorney



Cody Mortimer

Principal Consultant



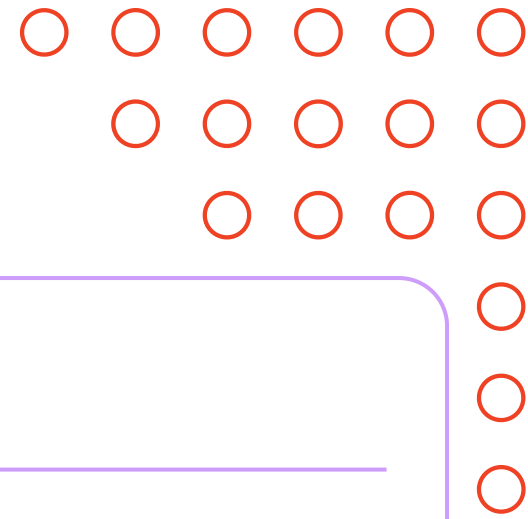
Amanda Rodi

Strategic Business Process
Leader



EMBRACING TOMORROW: INNOVATING RIM AND IG FOR A DIGITAL FUTURE

February 20, 2026 | At 8:30am



PANEL SPEAKER

ANDREW YSASI

Vice President of Advocacy

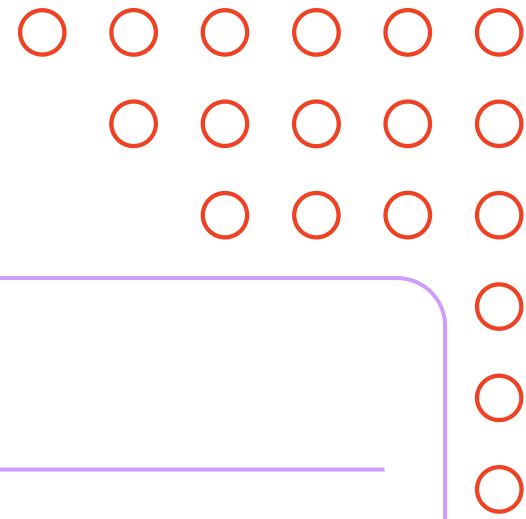
MS, CRM, IGP, CIP, CIGO, FIP, CIPM, CISM, PMP

**SPEAKER
BIO**



Andrew Ysasi brings 25 years of executive leadership in Information Governance. As Vice President of Advocacy at Vital Records Control, he mentors professionals, delivers education, and advances industry best practices. He serves on the ARMA International Board and as Treasurer of the ARMA International Educational Foundation. A recognized thought leader, Andrew teaches in San Jose State University's MARA program and contributes to ARMA's iGBOK and Wiley's Information Governance.

For more info connect on LinkedIn → [Andrew Ysasi](#)



PANEL SPEAKER

KAAN VOLKAN

ARMA/RIMPA Speaker

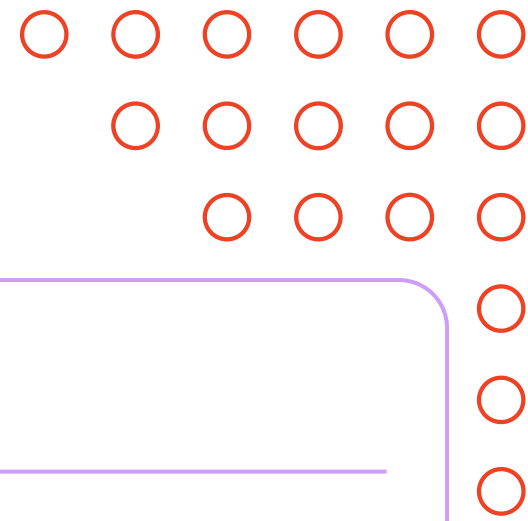
SPEAKER BIO

Kaan Volkan, RIMPA Global Ambassador and VP of ARMA San Antonio, has read over 20,000 technical pages on IG technologies and helped numerous organizations clean up file shares. Now, he focuses on sharing his findings under Records Insights Newsletter 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 as well as articles.



For more info connect on LinkedIn → [Kaan Volkan](#)



PANEL SPEAKER

NICKY MOONEY

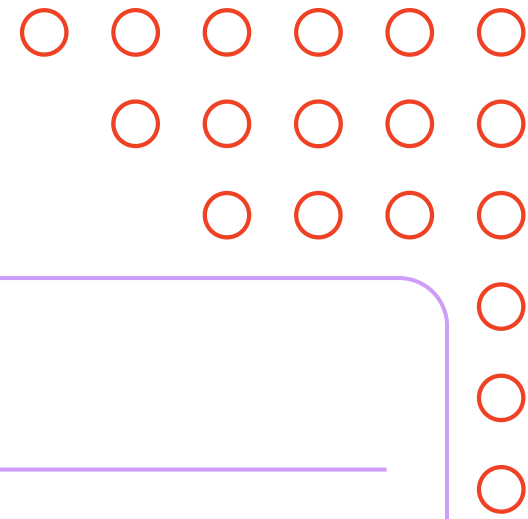
Attorney

SPEAKER BIO



Nichole “Nicky” Mooney is a Labor and Employment attorney at Dean Mead, focusing on risk mitigation, workplace policies, employee relations, and regulatory compliance. She advises businesses on practical solutions, including recordkeeping and privacy matters. Nicky has been recognized by Florida Trend and Super Lawyers for her leadership in labor and employment law and earned her J.D. from the University of Florida Levin College of Law.

For more info connect on LinkedIn → [Nichole Mooney](#)



PANEL SPEAKER

CODY MORTIMER

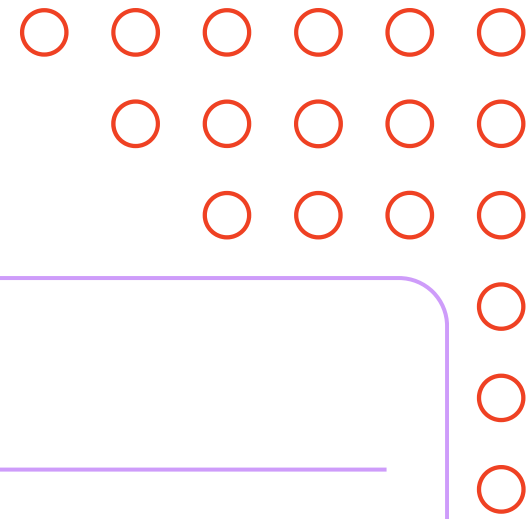
Principal Consultant

SPEAKER BIO



Cody is a strategic Records & Information Management and eDiscovery leader with expertise in global program development, risk mitigation, and technology modernization. He partners with clients to enhance RIM programs, manage litigation resources, and ensure regulatory compliance. Known for his proactive approach, Cody helps organizations build defensible, efficient programs that support litigation readiness and overall business resilience.

For more info connect on LinkedIn → [Cody Mortimer](#)



PANEL SPEAKER

AMANDA RODI

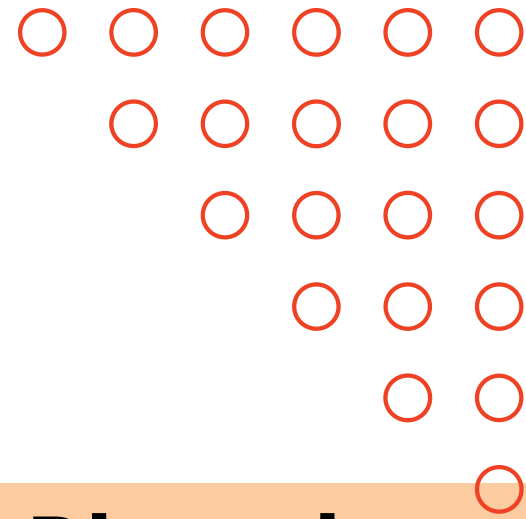
Strategic Business Process Leader

SPEAKER BIO



Amanda Rodi is the Managing Member of Innovative Development, LLC, a global consulting firm specializing in the design and implementation of repeatable, reliable, and defensible eDiscovery and Records Management Solutions. She leads Innovative Development from a People Centric Approach focused not only on processes but client and team engagement from the start of a project. Tools don't create great RIM programs; people make great RIM Programs.

For more info connect on LinkedIn → [Amanda Rodi](#)



ANDREW YSASI



Vice President of
Advocacy

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AI: Deep Dive Post-Panel Discussion

Artificial intelligence is rapidly reshaping how records and information are created, classified, reviewed, and governed. This post-panel discussion explores how RIM and Information Governance professionals should approach AI as both a powerful tool and a material risk requiring a critical shift in mindset, not just new technology. The session examines how AI is already transforming RIM, how it is changing traditional records automation, and what the emergence of agentic AI means for governance models that rely on human oversight and static rules. Attendees will gain practical insight into how AI is redefining the information lifecycle, and how IG and RIM professionals can remain relevant, defensible, and in control as AI systems take on a more active role.



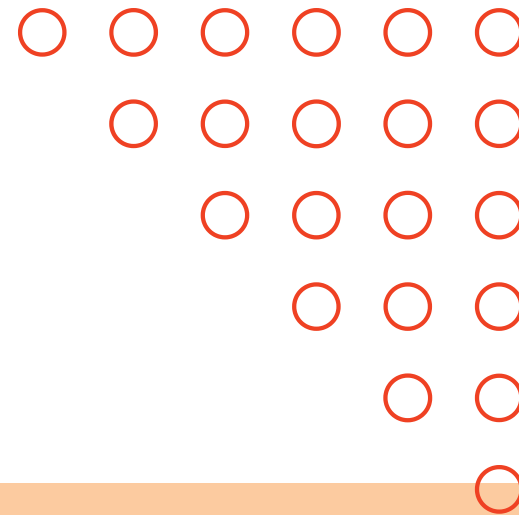
Date
February 20



Time
10:30am - 11:30am



Location
Cypress 4 & 5



KAAN VOLKAN



Archiving Doesn't Cut It

More data, AI projects, new regulations, cybersecurity breaches, PII leaks, move to the cloud, ROT clean-up.

ARMA/RIMPA
Speaker

Records managers are responsible for more and more and archives can't keep up with it. So, what do we do?

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In this webinar, Kaan Volkan will cover where the technology market is going.

There will be a heavy focus on the 3 common In-Place Management Architectures and their advantages/disadvantages. The content will be followed by a Q&A session where Kaan will share his data management insights from top U.S. banks and pharmaceutical companies.



Date
February 20



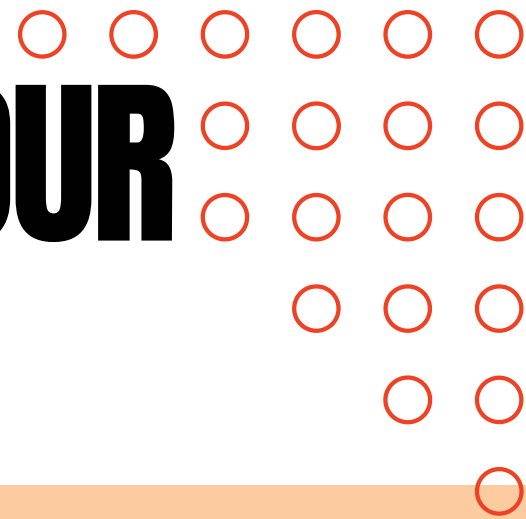
Time
10:30am - 11:30am



Location
Magnolia



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BUSINESS RECORDS MANAGEMENT

Information Securely Managed.

Gold



Morae



SPECIAL THANKS

To the 2026 ARMA Southeast Conference Board and Their Employers

Chattanooga

Susan Veal



Cynda Rymer-Moore



Allison Elmore
Scottie Swafford

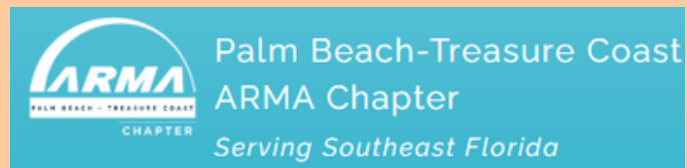


Florida Gulf Coast

Peggy Meinhardt



Mark Gish



Desiree Templin



Jacksonville

Kim Beach
Liz Bourland



Madison Kidd



Michelle Radar



Orlando

Katlin Musial



Dorothy Burkhalter

