

**Senior Agency Official for Records Management  
2022 Annual Report**

Name of SAORM: Leon Jourolmon  
Position Title: General Counsel  
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**1. What agencies, bureaus, components, or offices are covered by this report and your position as SAORM and which will be reporting separately?**

*Please provide a list and indicate any that are new or have been changed due to reorganization or other circumstances.*

Southeastern Power Administration

**2. In response to the COVID-19 pandemic, have any of the temporary adaptations to agency business processes become permanent improvements to the management and preservation of electronic records?**

- Yes
- No
- Not applicable, no adaptations were needed
- Do not know

*Please explain your response. (If Yes, include details of the changes and why they became permanent. If No, or Do not know, please explain your answer.)*

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**3. Has your agency taken action to meet the goal to manage, preserve and transfer all permanent records in an electronic format with appropriate metadata by June 30, 2024? (M-19-21, 1.2 and M-23-07, 1.1 and 1.2)**

- Yes
- No
- Do not know

*Please explain your response with specific actions taken, challenges and results.*

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**4. Has your agency taken action to meet the goal to manage and preserve all temporary records in an electronic format by June 30, 2024? (M-19-21, 1.3 and M-23-07, 1.3)**

- Yes
- No
- Do not know

*Please explain your response with specific actions taken, challenges and results.*

**5. Will your agency meet the requirements of M-19-21, 1.3 and M-23-07, 1.3 to close agency-operated records storage facilities and transfer inactive, temporary records to Federal Records Centers or commercial records storage facilities by June 30, 2024?**

- Yes
- No
- Not applicable, all records are in electronic format
- Do not know

*Please explain your response with specific actions taken, challenges and results.*



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**6. Does your agency have policies and procedures that incorporate records management into the information governance (IG) framework for information, data, and other agency information management? (This includes a relationship between CIO, CDO, SAORM, DRO/ARO, Records Management (RM) Staff, Security, Privacy Officers, and FOIA)**

*Note: The incorporation of records management into information governance is part of the framework covered by [OMB Federal Data Strategy - A Framework for Consistency \(M-19-18\)](#) as it provides a vision for managing and using federal data, along with recordkeeping requirements included in [OMB Circular A-130, Managing Information as a Strategic Resource](#).*

- Yes  
 No  
 Do not know

*Please explain your response and provide details about how your agency's policies enhance IG and RM's role or relationship to it.*

**7. Has your agency developed policies and procedures to ensure the capture and preservation of electronic messages, including when hardware or software is upgraded?**

*Note: Electronic messages means electronic mail and other electronic messaging systems that are used for purposes of communicating between individuals. Electronic messages that satisfy the definition of a federal record under the Federal Records Act are electronic records. This includes email, text messages, chat messages, voicemail, social media posts, and other similar applications. (See: [Email Management](#) and [CFR 1236: Electronic Records Management](#))*

- Yes  
 No  
 Do not know

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*Please explain your response and include details of your agency's methods to capture and preserve electronic messaging records or challenges preventing you from doing so.*

Our agency uses the Capstone system.

**8. Is your agency using or exploring cognitive technologies to identify records and distinguish between temporary and permanent retention?**

*Note: Cognitive technologies generally describe automated technologies that can be applied to recordkeeping practices and procedures. These include Artificial Intelligence, Robotic Process Automation, Software Robot or Bot, and other machine learning technologies.*

- Yes  
 No  
 Do not know

*Please explain your response. (If Yes, include details on both methods and tools being explored, the level of accuracy and how that level is determined.)*

**9. Do you as SAORM regularly oversee and evaluate the effectiveness of your records management program and its compliance with statutes and regulations?**

- Yes  
 No

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Do not know

*Please explain your response including what specific measures you have incorporated into the SAORM role.*

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**10. Is there specific policy or guidance you need from NARA to support the strategic direction of your records management program?**

- Yes  
 No  
 Do not know

*Please explain your response and include any comments on existing, pending, and future topics.*

SEPA is currently without a Record Manager. Aimee St. Clair will be on-boarded as the new Records Manager on April 21, 2024. Although she is experienced as a Records Manager, SEPA is a small agency with no other staff in Records Management. She may need additional guidance from NARA regarding SEPA compliance.

**11. Do you have any suggestions for how NARA can better engage with you and your program in your role as SAORM?**

- Yes  
 No  
 Do not know

*Please explain your response and include any comments on previous NARA SAORM engagements, topics for future engagements, or other suggestions.*

I will be replaced by Chris Wilk – CIO.



