

Bradlee Wilson Davis, CRA, INFO, MBA

PROFESSIONAL EXPERIENCE

Jackson Lewis P.C., 2013 — present

Raleigh, NC

Director of Records and Information Governance

Responsible for developing and documenting records and information management policies and procedures for all offices (57) including retention, information security and confidentiality and those that cover email and electronic records; Pivotal in introducing the concept of Information Governance to the firm and founding the firms Information Governance Task Force consisting of numerous leaders in the firm to proactively and transparently work toward building an IG framework; Implementation and management of firm wide automated records management system and RFID technology; Work with firm's executive management, admin, IT, and Information Services to develop firm-wide guidelines for managing client files regardless of their format or origin; Train firm employees on firm IG policies and procedures to enforce compliance; Responsible for training and supervising records staff. Identify inefficiencies in current new, active and closed matter file management processes; Work with attorneys and staff to educate on the importance of solid IG practices. Forte in creative marketing of the IG department and elevation of IG profession throughout the Firm.

Poyner Spruill LLP, 2006 — 2013

Raleigh, NC

Director of Records and Information Management

Developed the firms Records and Information (RIM) Program to include documentation and adoption of RIM policies, procedures and best practices for all offices; Managed the implementation of firm-wide automated records management system and RFID technology; Teamed with firm's executive management and Information Technology to develop firm-wide guidelines for managing client files regardless of their format or origin; Teaming with Information Technology to merge firms ARMS with the Electronic Document Management System (EDMS); Development and coordination of creative Change Management techniques tailored to legal mindset; Provide training and continued education for firm employees on firm RIM policies, procedures and best practices and enforce compliance through creative marketing techniques; Key player in the design, space allocation and build out of RIM spaces; Supervise RIM and Library staff; Identify inefficiencies in active and closed matter file management processes; Vendor liaison engaging in contract management and negotiation; Founding member and key decision maker on the firms Information Governance Team covering Privacy, Security, Business Continuity and Disaster Recovery, Records Retention, E-Discovery and Litigation Hold decisions; Founding member of firms Go Green to Save Green Committee, responsible for newsletter coordination and management of firm purges and recycling campaigns.

Nelson Mullins Riley & Scarborough, 1999 — 2006

Columbia, SC; Raleigh NC

North Carolina/DC Records Coordinator October 2003 -present

Conceptualized and coordinated the firm's Automated Records Management (ARMS) conversion process in the Raleigh, Winston Salem, Charlotte and DC offices. Implemented RM operation standards in NC offices and DC; Scripted the Records Management Operations Manual; Restructured and managed client file release and departing attorney processes; Actualized pleading indexing and electronic imaging processes in the Raleigh and Charlotte offices; Developed filing procedures for the NC and DC offices allowing for 24 hour turn around and near 0% error rate; Administered HR duties to

include hiring, discipline and supervision of three Records Clerks as well as supervision of RM responsibilities for non-RIM staff in Winston Salem; Consulted in other firm offices; Orchestrated Continuing Education sessions for firm staff on RIM issues;

Records Technician

January 2000-September 2003

Key player in the firm-wide implementation of an ARMS; Researched and proposed Retention Guideline information for the firm; Provided training on the ARMS to end users; Pivotal in the development of the firms Records Management operation standards and conversion to the ARMS and in all NMRS offices; Interviewed incoming RIM staff and provided recommendations for hire; Authored the ARMS Operations Manual;; Maintained the firms ARMS Systems Administration to include location codes and input of new users; Troubleshot ARMS programming problems and served as the technical contact with firms ARMS.

Records Assistant

June 1999-December 1999

Administered the Records Management (RM) offsite database; Processed the indexing and request of offsite files; Maintained accurate manual logs of checked out files; Served as the liaison between the firm and the offsite warehouse; Assisted AA's, paralegals, project assistants and attorneys with file location and file storage preparation; Assisted with microfilm projects and coordinated large scale box pulls. Studied and became knowledgeable of the firms newly acquired Automated Records Management System (ARMS) future implementation.

EDUCATION

The George Washington University – Washington, D.C.

MBA in Law Firm Management – Accepted

Strayer University – Raleigh, North Carolina

MBA in Management with honors, April 2011

Winthrop University – Rock Hill, South Carolina

BA in History Summa Cum Laude, May 1999

ARMA International

"A Home Study Course in Advanced Records and Information Management": 2004

PROFESSIONAL AFFILIATIONS

Association of Records Managers and Administrators, 2003 — present

2015 – present: Region Director for Mid-Atlantic Region

2011-2015: Chapter Advisor for Mid-Atlantic Region

2007-2011: Board President Triangle Chapter

2004-2006: Board Secretary Triangle Chapter

2006-2007: Board Treasurer Triangle Chapter

Information Governance Coalition, 2016 – present

2016 – present: Board of Directors Member

ACCOLADES

2007-2008 Chapter Member of the Year, ARMA Triangle Chapter

2007-2008 led ARMA Triangle Chapter to International Chapter of the Year Award

SPEAKING ENGAGEMENTS

"The Past, Present, and Future of Information Management", ARMA Richmond Chapter, May 9th 2018

"ARMA Chapters: How Far we Have Come and How Far we Have to Go", ARMA Tidewater Chapter 45th Anniversary, November 14th, 2017.

"Elevating the Records Management Profession with ARMA at your Side." ARMA Triangle Chapter Meeting, October 5th, 2017.

"FileTrail: Jackson Lewis: A Case Study for Modern Records Management in Law Firms", **ILTA, 2016**

"Information Governance: Keeping up with the Joneses", **Association of Legal Administrators Meeting, 2015**

"We are the Royals: Information Governance Takes the Throne", **ARMA Tidewater Chapter, 2014**

"We are the Royals: Information Governance Takes the Throne", **ARMA Triangle Chapter, 2013**

"Unified Records Management: Secrets to Mastering Information Intelligence" Panelist, **ARMA International Conference, 2013**

"Records Management: It's Everyone's Responsibility": Firmwide Electronic and Physical Records Management Initiative Presentation, **Poyner Spruill LLP, 2012**

"Into the Wild: How to Navigate Your Career as a Young Professional (and Come Out Unscathed)" Panelist. **ARMA International Conference, 2011**

DMSP/SDS Panelist, **Recall National Sales Conference, 2011**

"Law Firm Information Management — Improving Performance Through Records Management and RFID Tracking", **Webinar with FileTrail and Motorola, 2010**

"7 Trends Driving RFID Adoption" (featured in article), **RFID Journal, April 2011**

"Document Retention in the Legal Environment", **NC Bar Association Legal Assistants Division, 2005**

"Electronic Workflow in the Legal Environment", **ARMA Triangle Chapter, May 2005**

CERTIFICATIONS

Certified Records Analyst – Institute of Certified Records Managers

INFO designation – Information Coalition

Information Governance Professional - candidate

SharePoint Records Management Certificate: Solutions for EDRMS Success – June 2013

PHILANTHROPY

Board of Directors of Haven House Services of North Carolina, 2012 - current

OTHER

Instruments of Justice — Law Firm Band: Lead Singer

Caraleigh Mills HOA — President, 2009 — 2011

Campaign co-manager for Pam Vesper for NC Court of Appeals Judge - 201