

Joy Petersen

Records and Discovery Manager

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STRENGTHS

- 🔍 **Discovery judgment**
Complex requests received careful review of deadlines, privacy, redaction, and completeness. Legal partners gained a dependable regional resource.
- 👥 **Supervisor development**
Coaching, feedback, and workload planning helped supervisors handle escalations with greater confidence. Teams knew where to turn first.
- ✅ **Quality assurance**
Redaction reviews and audit analysis exposed gaps before release. That habit made production decisions easier to defend.
- 🤝 **Cross team partnership**
Legal, IT, and administrative partners received practical guidance instead of abstract policy language. Work moved forward with fewer surprises.
- ⚙️ **Process improvement**
Request trends became staffing and workflow recommendations. Small changes made daily service steadier during demanding periods.

SKILLS

Records Management

Dependency Discovery

Public Disclosure

Electronically Stored Information

Civil Rule WAC RCW

Child Welfare Records Privacy

Confidentiality Redaction

Retention Quality Assurance

Policy Analysis Supervision

SUMMARY

Records and discovery **manager** with 10 years of progressive public sector experience, including more than seven years supervising teams and directing disclosure, retention, **dependency discovery**, and quality assurance operations. Leads sensitive **child welfare** productions involving **Electronically Stored Information**, court deadlines, privacy, confidentiality, redaction, and complete records collection. Interprets Civil Rule, WAC, and RCW requirements, then converts legal obligations into practical procedures, training, audits, and defensible workflows. Partners with legal counsel, IT, administrative services, and field leadership on complex requests, policy implementation, data trends, and operational improvements. Experience includes Famlink, ARRTS/Opexus, Adobe Pro, AX, and ACT. Brings steady judgment to high profile matters and can help a public service organization protect confidential information, strengthen production quality, and support reliable regional operations.

EXPERIENCE

Records and Discovery Program Manager

North Sound Family Records Office 📅 May 2022 - Present 📍 Tacoma, WA

Direct regional dependency discovery and public records operations for sensitive child welfare matters. Supervise records supervisors, guide workload planning, consult with legal and technology partners, and align quality controls with court rules, privacy duties, retention standards, and leadership priorities.

- Directed dependency discovery productions for sensitive child welfare matters, meeting court deadlines and **privacy** standards.
- Supervised records supervisors through goals, reviews, coaching, workload planning, and complex production escalations.
- Established quality reviews for redaction, retention, **confidentiality**, ESI, and consistent production under **Civil Rule**, WAC, and RCW.
- Advised leaders on Famlink, Opexus, **Adobe Pro**, AX, ACT, and complex discovery workflows.
- Analyzed request volume, aging, exceptions, and audit findings, guiding staffing and policy recommendations.
- Represented records operations with **legal counsel**, IT, **administrative services**, and statewide workgroups on practical procedures.

Public Disclosure Supervisor

Puget Public Services Records Bureau 📅 January 2019 - April 2022 📍 Olympia, WA

Supervised analysts handling public disclosure and retention work involving confidential government and human services records. Managed complex reviews, staff development, electronic search issues, production quality, and workflow priorities across competing statutory deadlines.

- Supervised analysts processing **public disclosure** and **retention** requests involving confidential government information.
- Reviewed complex requests and redactions against statutory, privacy, **confidentiality**, and retention requirements before release.
- Built analyst training on ESI, defensible searches, **Adobe Pro**, records storage, and production documentation.
- Coordinated search, collection, format, and preservation solutions with legal and technology partners.
- Tracked timeliness and quality trends, revising procedures, templates, assignments, and quality checkpoints.
- Led performance discussions and project priorities, sustaining service during competing deadlines.

Records Operations Lead

Rainier Human Services Administration 📅 July 2016 - December 2018 📍 Lakewood, WA

LANGUAGES



MY CAREER



- Records and Discovery Program Manager at North Sound Family Records Office (4.3 Years)
- Public Disclosure Supervisor at Puget Public Services Records Bureau (3.2 Years)
- Records Operations Lead at Rainier Human Services Administration (2.4 Years)

Led daily records operations supporting social service programs, with ownership of intake, indexing, storage, retrieval, disclosure quality, staff guidance, and workflow improvement. Connected policy **research** and business requirements with practical electronic records solutions.

- Led intake, indexing, storage, retention, and retrieval practices across social service records operations.
- Researched policy, administrative rules, and **confidentiality** requirements, escalating legally complex questions to managers.
- Developed workflow requirements and partnered with **IT** on electronic document handling improvements.
- Checked disclosure packages for missing records, inconsistent redactions, and documentation gaps before release.
- Created job aids and trained administrative staff on lifecycle practices, secure storage, and request tracking.
- Managed improvement projects and deadlines, providing status, risk, and recommendation summaries to managers.

PROJECTS

Regional Discovery Quality Program 📅 2024

Created a regional quality program for dependency discovery, combining redaction reviews, retention checks, audit findings, and trend analysis. Program gave leaders clearer visibility into production risks and workflow priorities.

Electronic Records Workflow Improvement 📅 2021

Mapped electronic records search, collection, preservation, and production steps across public disclosure operations. Recommendations clarified handoffs, improved documentation, and supported consistent treatment of confidential information.

LEADERSHIP & AWARDS

- Recognized by regional leadership for dependable handling of complex, high profile discovery productions.
- Selected for statewide records workgroups based on practical expertise in disclosure quality and policy implementation.
- Earned sustained supervisory trust through coaching, audit response, and clear operational recommendations.

EDUCATION

Bachelor of Arts in Public Administration

University of Washington Tacoma 🎓 GPA: 3.5 📅 2016 📍 Tacoma, WA

Coursework: Public policy, administrative law, organizational management, public budgeting

CERTIFICATIONS

- Certified Records Manager (CRM) 📅 2021
- Public Records and Discovery Training 📅 2021

TECHNICAL SKILLS

- **Records Platforms:** Famlink, ARRTS, Opexus
- **Document Applications:** Adobe Pro, AX, ACT
- **Discovery Operations:** Dependency discovery, public disclosure, records requests
- **Legal Standards:** Civil Rule, WAC, RCW
- **Information Governance:** Retention, records lifecycle, storage
- **Privacy Controls:** Confidentiality, redaction, protected records
- **Quality Management:** Quality assurance, audits, trend analysis
- **Data Analysis:** Request volume, aging, exceptions
- **Supervisory Practice:** Performance feedback, mentoring, workload planning
- **Project Delivery:** Requirements, policy development, workflow improvement
- **Public Sector Services:** Child welfare, human services, administrative services

- **Electronic Records:** ESI, search, collection, preservation

PROFESSIONAL AFFILIATIONS

- Participant, statewide records and discovery workgroups focused on policy, quality, and operational consistency.
- Professional member, records management community supporting public disclosure, retention, privacy, and ESI practice.

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST