



2024 Senior Agency Official for Records Management Annual Report

The National Archives and Records Administration (NARA) requires Senior Agency Officials for Records Management (SAORM) to provide an annual report demonstrating how agencies are handling important records management initiatives as identified by NARA.

NARA uses the reports to

- determine the overall progress of the federal government in managing its records and the transition away from paper to digital formats
- to identify best practices and model solutions within federal agencies

On December 23, 2022, OMB and NARA issued a memorandum, *Update to Transition to Electronic Records* ([M-23-07](#)) that reinforced the goals in [M-19-21](#) and extended the 2022 deadlines to June 30, 2024. It is critical that Federal agencies move beyond paper-based processes and embrace the opportunities afforded to improve Government by transitioning fully to an electronic environment.

This year's SAORM report provides an opportunity for agencies to report on their progress towards electronic recordkeeping under these requirements, as well as other important records management initiatives.

The reporting period begins on January 13, 2025, and reports are due back to NARA no later than March 14, 2025.

NARA will post your 2024 SAORM report on the [NARA website](#) upon receipt. Please ensure that your agency's report is a publicly releasable version. This action is in the interest of transparency in government and to promote collaboration and communication among agencies.

NARA intends to list any non-responding agencies in a summary report on our website.

Instructions for Reporting:

- This template covers records management program developments, including those related to the transition to electronic recordkeeping as required by M-19-21 and M-23-07.
- Please be brief and precise in your answers. Limit answers to each question to no more than 500 words.
- Please complete the questions/items below and send the report to rmsselfassessment@nara.gov. Include the words “2024 SAORM Annual Report - [Agency Name]” in the subject line of the email.
- If you are responsible for records management in multiple agencies, components, or bureaus, please determine how you will submit reports to NARA. While NARA prefers a comprehensive report, you may submit separate reports for each component.

NARA may follow up with agencies to obtain additional information and/or documentation related to responses provided in the template.

Please provide the following information (required):

- Name of SAORM: Lisa Crunk
 - Position title: Records Manager
- 1. What agencies, bureaus, components, or offices are covered by this report and your position as SAORM, and which will be reporting separately?**

American Battle Monuments Commission
 - 2. Did your agency meet the goal to manage all permanent records in an electronic format to the fullest extent possible for eventual transfer and accessioning by June 30, 2024? (M-19-21, 1.2 and M-23-07, and 1.1)**

☒ Yes
☐ No
☐ Not applicable, all records were already in electronic format

If No, why not? (Include if you already submitted, or will still be submitting an exception request and/or details of specific challenges your agency had in meeting the goal.)

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- 3. Did your agency 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
☒ Not applicable, all records were already in electronic format

If No, why not? (Include if you already submitted, or will still be submitting an exception request and/or details of specific challenges your agency had in meeting the goal.)

- 4. Did your agency meet the requirements of M-19-21, 1.3 and M-23-07, 1.3 to close agency-operated records storage facilities by June 30, 2024? (Choose all that apply)**

- ☐ Yes
☐ No
☒ Not applicable, my agency did not have agency-operated records storage facilities
☐ Not applicable, all records were already in electronic format

If No, why not? (Include if you already submitted, or will still be submitting an exception request and/or details of specific challenges your agency had in meeting the goal.)

- 5. Did your agency meet the requirements of M-19-21, 1.3 and M-23-07, 1.3 to transfer inactive, temporary analog records to NARA Federal Records Centers (FRC) or commercial storage facilities by June 30, 2024? (Choose all that apply)**

- ☐ Yes, we transferred the records to the FRC
☐ Yes, we transferred the records to commercial storage facilities
☐ No
☒ Not applicable, all records were already in electronic format

If No, why not? (Include if you already submitted, or will still be submitting an exception request and/or details of specific challenges your agency had in meeting the goal.)

- 6. Are you supporting the implementation and closure of any corrective actions that resulted from a finding and recommendation documented in a NARA inspection or assessment of your agency's RM program?**

- ☒ Yes
☐ No
☐ Not applicable, my agency is not under a plan of corrective action

If Yes, please explain how you are supporting the implementation and closure of the corrective actions. If No, why not?

The final item on ABMC's corrective action plan is to develop file plans and records inventories. The records management office is in the final stages of completing these two tasks. Expectation is to have them complete by mid-2025.

- 7. Are you advocating for the agency's records management program and ensuring that it documents the organization's activities and decisions by participating in meetings and working groups dedicated to improving records management in your agency?**

☒ Yes

☐ No

If Yes, please explain how. If No, why not?

The records manager is actively advocating for the records management program by coordinating with departments regarding the management of their records in association with the utilization of best practices for file naming conventions, folder structures, identification of permanent records versus temporary, and storage. Annual and subject specific training is provided throughout the year to all staff. The records manager is currently developing the foundational structure for an electronic records management system to manage its records. The implementation of this system will require multiple meetings and working group sessions with departments to effectively structure and deploy the system.

- 8. Are you ensuring the agency protects records against unauthorized disposition (e.g., destruction, deletion, alteration, removal, or loss) as defined in NARA regulations and guidance?**

☒ Yes

☐ No

If Yes, please explain how. If No, why not?

The records manager provides annual training on disposition requirements for all records on the agency records schedule. Prior to disposal, staff are required to notify the records officer for approval of any records. Guidance is provided as to NARA requirements on this subject on an annual basis.

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

☒ Yes

☐ No

It would be helpful if NARA would explain how metadata could be captured 10-15 years after an electronic record is created prior to its transfer to NARA. Metadata is rarely embedded in a file at the time of creation, and the onus is on the records manager to develop it years afterwards to meet with NARA requirements for transfer.