

REQUEST FOR RECORDS DISPOSITION AUTHORITY <i>(See Instructions on reverse)</i>		LEAVE BLANK (NARA use only)	
TO: NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NIR) WASHINGTON, DC 20408		JOB NUMBER <i>NI-059-04-1</i>	
1. FROM (Agency or establishment) Department of State		DATE RECEIVED <i>12/16/03</i>	
2. MAJOR SUBDIVISION Bureau of Administration		NOTIFICATION TO AGENCY	
3. MINOR SUBDIVISION G8 Summit Planning Organization (A/G-8)		In accordance with the provisions of 44 U.S.C. 3303a the disposition request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10.	
4. NAME OF PERSON WITH WHOM TO CONFER Alice S. Ritchie	5. TELEPHONE (202) 261-8511	DATE <i>6-2-04</i>	ARCHIVIST OF THE UNITED STATES <i>John W. Paul</i>

6. AGENCY CERTIFICATION
I hereby certify that I am authorized to act for this agency in matters pertaining to the disposition of its records and that the records proposed for disposal on the attached 10 page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified; and that written concurrence from the General Accounting Office, under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies,

is not required; is attached; or has been requested.

DATE 12/05/03	SIGNATURE OF AGENCY REPRESENTATIVE Margaret G. Peppe <i>Margaret G. Peppe</i>	TITLE Division Chief, A/RPS/IPS/PP
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7. ITEM NO.	8. DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9. GRS OR SUPERSEDED JOB CITATION	10. ACTION TAKEN (NARA USE ONLY)
See continuation pages			

SS copies sent Agency, NWML, NR

05/14/04

G-8 Summit Planning Organization Records Disposition Schedule

G-8 Summit Planning Organization

Since 1975, the heads of state or government of the major industrial democracies have been meeting annually to deal with the major economic and political issues facing their domestic societies and the international community as a whole. The responsibility of host rotates throughout the summit cycle at the end of the calendar year, as follows: France, United States, United Kingdom, Russia (as of 2006), Germany, Japan, Italy and Canada.

In assuming the responsibility for the 2004 G-8 Summit hosted by the United States next June 8-10, 2004, the Summit Planning Organization (SPO) will prepare and coordinate all necessary logistical and administrative arrangements.

This will include coordination with the State of Georgia, with various municipal governments, with the local communities and with interest groups as well as with the private sector in order to provide all necessary support. This planning will also include coordination with all required agencies of the federal government.

The Department of State's Bureau of Administration (A/EX) provides administrative oversight and services including such things as general services, travel, budget and financial planning, and human resources.

Executive Director

1. Program Files

Includes reports, email messages, background material, and correspondence documenting the activities related to the unique, substantive functions for which the SPO is responsible. Arranged by subject.

Disposition: TEMPORARY. Cut off at end of the Summit. Retain in office area until completion and publication of after action report and then retire to Records Service Center. Delete/destroy 10 years after cut off.

Disposition Authority: Pending

2. After-Action Report – Arranged by function

Report with annexes detailing the activities of each of the Summit Planning Organization's functional areas (administration, liaison, communications, accommodations, etc.). The report is organized by function, documents the activities of the SPO, and serves as a "lessons learned" resource for future summit planning.

Disposition: TEMPORARY. Retire to the Records Service Center upon completion of the Summit and publication of the report. Delete/destroy when 10 years old or when superseded by report of next U.S. hosted Summit, whichever is sooner.

Disposition Authority: Pending

3. Daily Activity Records

Files include calendars, appointment books, schedules, logs, diaries, and other records documenting minutes, appointments, telephone calls, trips, visits, and other activities while serving in an official capacity.

- a. Records containing substantive information relating to official activities, the substance of which has not been incorporated into official files, excluding records relating to official activities of high-level officials.

Disposition: TEMPORARY. Cut off at end of the Summit. Retain in office area until completion of after action report and then retire to Records Service Center. Delete/destroy 2 years after cut off.

Disposition Authority: GRS 23, item 5a

- b. Records documenting routine activities containing no substantive information and records containing substantive information, the substance of which has been incorporated into official files, excluding records related to official activities of high-level officials.

Disposition: TEMPORARY. Delete/destroy when no longer needed for convenience or reference.

Disposition Authority: GRS 23, item 5b

Deputy Executive Director

4. Program Files

Includes reports, email messages, memoranda, background material, and general correspondence documenting the activities related to the unique, substantive functions for which the SPO is responsible. Topics include such things as Core Week Schedule, non-government organizations, special interest groups, action item follow-up, administration and internal SPO policy, personnel issues, etc. Arranged by subject.

Disposition: TEMPORARY. Cut off at end of summit. Retain in office area until completion of after action report. Delete/destroy upon completion and publication of after action report.

Disposition Authority: Pending

5. Meeting Minutes

File contains email, transcripts, or written copies of minutes, agenda, list of attendees, proposals submitted for consideration, action items and final recommendations of meetings with SPO staff, Interagency Governmental Task Force, and other forums involved in summit planning. Arranged by topic or organization.

Disposition: TEMPORARY. Cut off at end of summit. Retain in office area until completion of after action report. Delete/destroy upon completion of after action report.

Disposition Authority: Pending

General Counsel

6. Program Files

Includes reports, email messages, memoranda, background material, and general correspondence documenting the legal advice provided SPO staff relative to the functions for which the SPO is responsible. Topics can include such areas as Host and Legacy Committee liaison, contract reviews, ethics questions, first amendment issues, Privacy Act statement for website, trademark issues related to G-8 logo, and interpretations of laws. Arranged by subject within each SPO function.

Disposition: TEMPORARY. Cut off at end of summit. Retain in office area until completion of after action report. Delete/destroy upon completion of after action report.

Disposition Authority: Pending

Functional Director

7. Functional Director Files

Files contain information about Director and staff officer activities related to domestic and international liaison, operations, communications, events, credentialing, accommodations, information technology, and administration, including liaison with State's Bureau of Administration. Includes copies of correspondence, progress reports, publications, drafts of documents, background data and reference materials. Arranged by subject or country within each functional area.

Disposition: TEMPORARY. Cut off at conclusion of project or assignment. At end of summit screen out documents for inclusion in the appropriate official file. Delete/destroy remainder of file when projects, assignments, and after action report are completed.

Disposition Authority: Pending. Reference Department's 5 FAH-4 H-216.5 and N1-59-89-25, item 15

8. Video Recordings

Programs produced by and acquired from outside sources. Videos are to be used for the purpose of informing the public about the planning of events related to the G-8 Summit.

Disposition: TEMPORARY. Cut off at end of the Summit. Retain in office area until completion and publication of after action report and then retire to Records Service Center. Delete/destroy 10 years after cut off.

Disposition Authority: Pending

9. G-8 Summit Planning Organization Web Site (<http://www.g8usa.gov/>) Records

The G-8 web site is intended to disseminate information (available in other forms) to the public, to report on the activity and operation of the web site, and to collect information needed to complete preparations for the Summit. The web site will also collect information, including some personal information, required for the issuance of the Summit credentials. This information will be processed in accordance with the provisions set forth in Department of State Privacy Act System of Records, STATE-36, Security Records. In addition, information is collected for statistical purposes and software programs are used to monitor network traffic to identify unauthorized attempts to upload or change information or otherwise cause damage.

a. g8usa.gov Web site Archives

Includes a paper copy of all screen printouts of web site pages at any given point in time. The printouts are copies of content material as actually seen by a user as of a specific date. The web site serves as a static repository for summit planning information and will be taken down at the conclusion of the Summit.

Disposition: TEMPORARY. Cut off at end of the Summit. Hold printouts in current file area until completion of after action report and then retire to Records Service Center. Delete/destroy 10 years after cut off.

Disposition Authority: Pending

b. G8usa.gov Web site Content Records

Electronic records documenting the content of the g8usa.gov web site. This includes, but will not be limited to, personal information on all individuals who have or seek credentials e.g., delegates, media, staff, vendors, etc. who need access to Summit venues (typically those that have been designated as NSSE (National Special Security Event) venues). Other information collected includes information about a persons visit to the web site. Any personal information an individual provides in an email message will only be used to respond to the email.

Disposition: TEMPORARY. Cut off at end of the Summit. Hold records until completion of after action report or superseded by updated information. Retire to Records Service Center upon completion of after action report and delete/destroy 3 years after cut off.

Disposition Authority: Pending

c. **g8usa.gov Feedback and Statistical Reports**

Electronic records that contain all comments and feedback from web site users. There is also another set of reports, which contain utilization statistics on the web site.

Disposition: TEMPORARY. Cut off at end of the Summit. Upon completion of after action report retire to Records Service Center and delete/destroy data 3 years after cut off.

d. **g8usa.gov Maintenance and Operation Records**

Paper and electronic records documenting g8usa.gov web site maintenance, operations, and program administration.

Disposition: TEMPORARY. Cut off at end of the Summit. Upon completion of after action report retire to Records Service Center and destroy/delete records 3 years after cut off.

10. Duplicate Personnel Files

Supervisor's Personnel Files – Correspondence, memoranda, resumes, forms, and other records relating to positions, authorizations, pending actions; copies of position descriptions, and records on individual employees duplicated in or not appropriate for the employees Official Personnel Folder.

Disposition: TEMPORARY. Review at end of summit and destroy superseded or obsolete documents; or delete/destroy file relating to an employee within 1 year after separation or completion of summit.

Disposition Authority: GRS 1, item 18a

11. Time and Attendance Source Records

All time and attendance records upon which leave input data is based, such as sign-in sheets, Time and Attendance Reports, Authorization of Premium Compensation; TATEL/PC (draft and final report); Leave Statements; flexible records, and leave applications for jury and military duty. Records may be in either paper or electronic form.

a. Originating Office

Disposition: TEMPORARY. Cut off files annually. Retire to Records Service Center. Delete/destroy after GAO audit or when 6 years old, whichever is sooner.

Disposition Authority: GRS 2, item 7

b. All other office copies.

Disposition: TEMPORARY. Delete/destroy when no longer needed, or when 2 years old, whichever is sooner.

Disposition Authority: GRS 23, item 1

12. Leave Slips – Application for Leave

Includes requests for and approvals of leave.

a. If timecard or TATEL draft has been initialed by employee.

Disposition: TEMPORARY. Delete/destroy leave slip at end of following pay period.

Disposition Authority: GRS 2, item 6a

b. If timecard or TATEL draft has not been initialed by employee.

Disposition: TEMPORARY. Delete/destroy leave slip after GAO audit or when 3 years old, whichever is sooner.

Disposition Authority: GRS 2, item 6b

13. Budget Background Records

Includes cost statements, rough data and similar materials accumulated in the preparation of annual budget estimates, including duplicates of budget estimates and justifications and related appropriation language sheets, narrative statements, and related schedules; and originating offices' copies of reports submitted to budget offices.

Disposition: TEMPORARY. Delete/destroy 1 year after the close of the fiscal year covered by the budget.

Disposition Authority: GRS 5, item 2

14. Financial Plans

Financial plans and related worksheets, reports and communications.

Disposition: TEMPORARY. Delete/destroy 3 years after close of fiscal year in which prepared.

Disposition Authority: NC1-59-77-26, item 11

15. Appropriation Allotment Files

Allotment records showing status of obligations and allotments under each authorized appropriation.

Disposition: TEMPORARY. Delete/destroy 6 years and 3 months after the close of the fiscal year involved.

Disposition Authority: GRS 7, item 3

16. Expenditure Accounting Posting and Control Files

Records such as distribution ledgers, registers of interoffice transfers, expenditure voucher file, liquidation memorandums and other series of posting and control media, subsidiary to the allotment ledgers, and not otherwise provided for in this schedule. Included are related communications, reports, tabulations and worksheets.

Disposition: TEMPORARY. Delete/destroy when 3 years old.

Disposition Authority: GRS 7, item 4a

17. Allotment Reports

Monthly reports of allottees, showing current and cumulative to date transactions as reflected in their distribution ledgers. Included are related communications and worksheets.

Disposition: TEMPORARY. Delete/destroy 4 years after close of fiscal year prepared.

Disposition Authority: NC1-59-77-26, item 12

18. Routine Procurement and Contract Files

Files contain contracts, requisitions, purchase orders, leases, and bond and surety records, including correspondence and related papers pertaining to award, administration, receipt, inspection and payment.

Disposition: TEMPORARY. Cut off at end of summit. Delete/destroy upon termination or completion of contract or payment, whichever is later. Note: This excludes files located in the contracting office and finance offices that are responsible for the record copy.

Disposition Authority: GRS 3, item 3c

19. Supplies, Services and Equipment (General)

Records relating to the ordering of supplies, requests for office services and equipment requests and receipts. Included are Requisition for Equipment, Supplies, Furniture, Furnishings or Services, Requisition for Publishing, Reproduction, and Distribution Services and related documents.

Disposition: TEMPORARY. Cut off at end of summit. Delete/destroy when 2 years old or when no longer needed, whichever is later. Note: This excludes files located in official files of those offices that are responsible for the record copy.

Disposition Authority: GRS 23, item 1

20. International Merchant Purchase Authorization Card (I.M.P.A.C.) Files

Includes copies of monthly credit card statements, receipts, and related documentation. Note: Signed original of Monthly Credit Card Statement is maintained by the Office of Resource Management for 6 years and 3 months. Arranged by fiscal year.

Disposition: TEMPORARY. Cut off at end of summit. Retire to Records Service Center. Delete/destroy after GAO audit or when 3 years old, whichever is sooner.

Disposition Authority: N1-59-96-29, item 1

21. Travel Files

Includes records relating to routine and operational aspects of travel and visits by other than prominent individuals and congressmen. Included are travel orders, per diem vouchers, transportation requests, hotel reservations, and all supporting documents.

Disposition: TEMPORARY. Cut off at end of summit. Retire to Records Service Center. Delete/destroy 2 years after cut off.

Disposition Authority: GRS 9, item 4a

22. Word Processing and Email Files

Electronic copies of records, including but not limited to letters, messages, memoranda, reports, handbooks, directives, and manuals, that are created on electronic mail and word processing systems and used solely to generate a recordkeeping copy of the records covered by the other items in this schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.

- a. Copies that have no further administrative value after the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recordkeeping copy.

Disposition: TEMPORARY. Delete/destroy within 180 days after the recordkeeping copy has been produced.

b. Copies used for dissemination, revision, or updating that are maintained in addition to the recordkeeping copy.

Disposition: TEMPORARY. Delete/destroy when dissemination, revision, or updating is completed.

Disposition Authority: GRS 23, item 10