

**REQUEST FOR RECORDS DISPOSITION AUTHORITY**  
*(See Instructions on reverse)*

NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NIR)  
 WASHINGTON DC 20408

1 FROM (Agency or establishment) **DEPARTMENT OF TREASURY**

2 MAJOR SUBDIVISION **OFFICE OF THE SECRETARY**

3 MINOR SUBDIVISION **PARTNERSHIP IN EDUCATION AND PUBLIC CORRESPONDENCE**

4 NAME OF PERSON WITH WHOM TO CONFER **Veronica Marco**

5. TELEPHONE **(202) 622-2477**

LEAVE BLANK (NARA use only)

JOB NUMBER **71-056-03-1**

DATE RECEIVED **11-5-2002**

NOTIFICATION TO AGENCY

In accordance with 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request, including amendments, is approved except for items that may be marked "disposition not approved" or withdrawn" in column 10

DATE **2-25-03** ARCHIVIST OF THE UNITED STATES *[Signature]*

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 \_\_\_ 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 **11/5/2002** SIGNATURE OF AGENCY REPRESENTATIVE *Veronica Marco* TITLE **Chief, Records Management Services Branch**

7 ITEM NO	8 DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)
	<b>See the Attached Sheets</b>		
	<i>cc Agency, NR, NWML, NWMD</i>		

**Department of Treasury**  
**Office of Partnership in Education:**

Partnership in Education (PIE) is a Treasury-wide school-to-careers and educational and community outreach initiative. The PIE program has four program focus areas: future workforce development; career academies; bureau educational outreach initiatives such as Adopt-a-School programs; and surplus compute requirement technology training and support to schools.

The executive director serves as the principal advisor to the Secretary, Chief of Staff and Executive Secretary on matters involving partnership programs of the Department and its bureaus. The executive director provides policy guidance and direction to Treasury offices and bureaus regarding PIE programs; chair the PIE Steering Committee; and provide information that warrants communication to the Secretary concerning Treasury-wide partnership programs.

This program was establish on 2/8/99 and has a sunset review date of 2/8/04.

**1. Monthly Update Reports**

Monthly reports electronic and hard copy that are prepared for the Executive Secretary as a basis for briefing or keeping the Secretary informed of the status of the program. The reports include pertinent statistics on general student employment, bureau participation in partnership schools and summary data from surveys of students, supervisors, and bureau representatives on program effectiveness. In addition, the report provides updates on the results of meetings of the PIE Steering Committee and the PIE Executive Advisory Board.

**Disposition: Permanent.** Break files annually. Transfer to the Washington National Record Center when two years old or when no longer needed for agency business, whichever is later. Transfer to National Archives when 15 years olds.

**2. Student Information Worksheet**

An Excel spreadsheet is maintained that tracks information on students while they are in the program. The information comes from the Treasury bureaus and departmental offices. Information collected includes student data, profiles, and school partnership information. The worksheet is used as the base from which data is extracted for other reports such as the DC Student Employment Initiative.

**Disposition: Temporary.** Delete record 5 years after student participation program or when no longer needed for administrative, legal, audit, or other operational purposes, whichever is later.

**3. Inventory of Student Outreach Efforts**

The office compiles, updates, and maintains an inventory of student outreach activities in which the Bureaus are engaged. The inventory catalogues the types of activity and describes the various programs in which bureaus participate. The general categories in the inventory are: Student Career Employment Program (SCEP), Student Temporary Employment Program

(STEP), Partnership in Education Program, School Year Employment Program, Academy Support, Student Volunteer Opportunities, Adopt -a-school, Other Student Outreach Efforts.

The inventory is of use as a reference for anyone seeking information on Departmental or bureau activities in the area of student educational outreach efforts.

**Disposition: Temporary** - Delete record 5 years after student participation in program or when no longer needed for agency business.

#### **4. Electronic Mail and Word Processing System Copies**

Electronic copies of records created on electronic mail and word processing or other electronic systems and used solely to generate a record keeping copy of the records covered by the other items on this schedule. Also includes electronic copies of records created on electronic mail and word processing and other electronic systems that are maintained for updating, revision, or dissemination. This definition excludes printed or electronically stored copies of electronic mail messages or printed entries from an office's automated matter tracking systems insofar as such entries or messages are recordkeeping copies of substantive legal work.

- a. Copies having no further administrative value after the recordkeeping copy has been produced - including copies maintained by individuals in personal files, personal electronic 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. Break after recordkeeping copy has been produced. Destroy/delete 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. Break upon completion of dissemination, revision, or updating of information. Destroy/delete when dissemination, revision, or updating is completed.

**Department of Treasury**  
**Office of Public Correspondence:**

The Office of Public Correspondence (OPC) is responsible for processing public communications (letters, faxes, and e-mail messages) addressed to the Secretary of the Treasury, the Deputy Secretary, and the Treasury Department. The OPC also provides the Secretary and other senior officials with summaries of public sentiment. The processing of these communications requires maintaining computerized records of the correspondent's name and mailing address, as well as a synopsis of the subject matter. The OPC refers some correspondence to other Treasury Offices and Bureaus for direct reply, but answers most of the communications in house. We maintain copies of the outgoing correspondence.

**5. Eagle Scout Letters**

Letters that are written to the Secretary requesting letters of acknowledgement for the achievement of obtaining Eagle Scout or Gold Award status. These letters are signed using the Secretary's Autopen signature. The letters are filed numerically by log number by month.

**Disposition: Temporary.** Destroy one year after closeout or when no longer needed for business.

**6. Casework Referral Files:**

Letters addressed to the Secretary or Department of Treasury bureaus that are forwarded to the bureaus for response. Responses may or may not be received by the bureaus. Letters are logged in and filed by log number.

**Disposition: Temporary.** Destroy when 1 year old or when no longer needed for current agency business, whichever is later.

**7. Policy and Information Letters:**

Form letters that are generated to other offices in the department of Treasury, as a result of incoming requests that could not be answered by the Office of Public Correspondence. Responses may or may not be returned to the Office of Public Correspondence. All responses received are filed by answer date.

**Disposition: Temporary.** Destroy when 1 year old or when no longer needed for current agency business, whichever is later.

**8. Bills of Exchange:**

These letters are fraudulent claims against the Treasury that are being received by banks across the country and are being investigated and prosecuted by the Secret Service. These letters are sent directly to the US Secret Service main headquarters in Washington DC.

**Disposition: Temporary.** Destroy when 2 years old or when no longer needed for current agency business, whichever is later.

**9. Campaign Mail:**

Form letters or postcards addressed to the Secretary from the public that is issue driven addressing a variety of concerns. Laws or rules may be passed as a result of the campaign mail and are tracked by other organizations in departmental offices.

**Disposition: Temporary.** Retain one sample of each type of form for one year. Destroy when 1 year old or when no longer needed for current agency business, whichever is later.

**10. No Response Necessary (NRN) Letters**

Letters sent to the Department of Treasury by the public that are not Treasury related or require a response from Treasury. NRN's also include copies of letters sent to other government agencies, such as the Office of the President.

**Disposition: Temporary.** Destroy after one year or when no longer needed for business, whichever is later.

**11. Office of Public Correspondence Database:** Access database used to track letters and correspondence from public sources. Database is used mainly for casework referral files and policy and information letters (Items 6 and 7 of this schedule). Information includes name of sender, address and subject matter.

**a. Inputs:** Incoming letters from public sources.

**Disposition: Temporary.** Disposition is covered by items 6 and 7 of this schedule.

**b. Outputs:** Weekly reports and other reports generated as a response to request for information maintained in database.

**1. Electronic copy**

**Disposition: Temporary.** Delete when 5 years old or 1 year after change in administration, whichever is later.

**2. Recordkeeping Coy (Paper)**

**Disposition: Temporary.** Destroy when 1 year old or when no longer needed for business purposes, whichever is later.

**a. Masterfile.** Information includes name of sender, address, and subject matter.

**Disposition: Temporary.** Retain online 5 years or until no longer needed for business purposes, whichever is longer.

**12. Electronic Mail and Word Processing System Copies:**

Electronic copies of records created on electronic mail and word processing or other electronic systems and used solely to generate a record keeping copy of the records covered by the other items on this schedule. Also includes electronic copies of records created on electronic mail and word processing and other electronic systems that are maintained for updating, revision, or dissemination. This definition excludes printed or electronically stored copies of electronic mail messages or printed entries from an office's automated matter tracking systems insofar as such entries or messages are recordkeeping copies of substantive legal work.

- a. Copies having no further administrative value after the recordkeeping copy has been produced - including copies maintained by individuals in personal files, personal electronic 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. Break after recordkeeping copy has been produced. Destroy/delete 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. Break upon completion of dissemination, revision, or updating of information. Destroy/delete when dissemination, revision, or updating is completed.