

Rec'd NCD 30947944

REQUEST FOR RECORDS DISPOSAL AUTHORITY  
(See Instructions on reverse)

LEAVE BLANK

JOB NO.

NC1-51-79-12

DATE RECEIVED

May 1, 1979

NOTIFICATION TO AGENCY

In accordance with the provisions of 44 U.S.C. 3303a the disposal request, including amendments, is approved except for items that may be stamped "disposal not approved" or "withdrawn" in column 10

TO: GENERAL SERVICES ADMINISTRATION,  
NATIONAL ARCHIVES AND RECORDS SERVICE, WASHINGTON, DC 20408

1. FROM (AGENCY OR ESTABLISHMENT)  
Executive Office of the President

2. MAJOR SUBDIVISION  
Office of Administration

3. MINOR SUBDIVISION  
Information Management and Services Division

4. NAME OF PERSON WITH WHOM TO CONFER  
Steve Rudzinski

5. TEL. EXT.  
395-3914

JUL 31 1979

Date

*James B. Rhoads*  
Archivist of the United States

6. CERTIFICATE OF AGENCY REPRESENTATIVE

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposal of the agency's records; that the records proposed for disposal in this Request of 9 page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified.

A Request for immediate disposal.

B Request for disposal after a specified period of time or request for permanent retention.

C. DATE 4/30/79	D. SIGNATURE OF AGENCY REPRESENTATIVE <i>Nell Doering</i>	E. TITLE Records Management Officer/Acting
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7. ITEM NO.	8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)	9. SAMPLE OR JOB NO.	10. ACTION TAKEN
	See attached Records Control Schedule:  Office of Management and Budget Records of the Office of the Director		

*20 items*

*sent to acw, NL, NWB, NW T*

*MS 8-10-79*

OFFICE OF MANAGEMENT AND BUDGET

Office of the Director

Records Common to All Offices

1. Personal Papers. Papers of a private or nonofficial character which pertain only to an individual's personal affairs that are kept in the office of an OMB employee will be clearly designated by him or her as nonofficial and will at all times be filed separately from the official records of his or her office. In cases where matters requiring the transaction of official business are received in private personal correspondence, the portions of such correspondence that pertain to official business will be extracted and made a part of the official files.

TEMPORARY. Dispose when no longer needed.

2. Program Reference Material. The program reference material consists of extra copies of record materials retained solely for convenience of reference; information and reference copies of correspondence and other papers on which no action is necessary; preliminary drafts of letters, memoranda, reports, studies, preliminary worksheets and informal notes that do not add significant data or substance in the final steps of the preparation of an official record; shorthand notes, including stenographic notebooks and stenotype tapes, that have been transcribed; abstracts of correspondence, route slips, and letters of transmittal that do not contain significant information; stocks of publications and processed documents maintained for distribution purposes; catalogues, trade journals, and other publications or printed material received from other Government agencies, commercial firms, or private institutions, which require no action or supplement the official record.

TEMPORARY. Cut-off each year.  
Destroy when obsolete or superseded.

Records of the Director's Office

3. Director's Office Files. The Director's Office files contain correspondence, inter and intra agency memoranda reflecting the Director's responsibilities for the general direction and coordination of Office activities and decisions; for maintaining liaison with the President, Congress, other Government agencies, and the public; for the determination of Office policy and programs; and the defining of the Office's organization. The records are maintained by major functional categories and by subject thereunder. *(7 cu. ft./yr.)*

PERMANENT. Cut-off every 2 years.  
 Transfer to EOP Depository every 2 years.  
 Transfer to FRC every 2 years.  
 Offer to NARS when 8 years old.

4. Director's Chronological File. The Director's chronological file contains copies of correspondence signed by the Director, Deputy Director, Executive Associate Directors, Associate Directors, and Assistant Directors. The file is arranged chronologically by month. *(4 cu. ft./yr.)*

PERMANENT. Cut-off every 2 years.  
 Transfer to EOP Depository every 2 years.  
 Transfer to FRC every 2 years.  
 Offer to NARS when 8 years old.

5. Reorganization Files. These files reflect the President's authority to examine the organization of all agencies and to determine changes in organization that may be necessary. These files contain background materials from the Congress, State and local governments, and individual groups and citizens. They also contain final studies and reports prepared prior to the submittal of reorganization plans to Congress which will accomplish purposes such as; promoting better execution of the laws and more effective management of the executive branch; reducing expenditures and increasing efficiency and economy; reducing the number of agencies with similar functions by consolidation or abolishment; and eliminating duplication and overlapping of functions and responsibilities. The files are arranged alphabetically by subject. *(ca. 300 cu. ft./Carter Adm.)*

Cut-off when study has been completed.

Transfer to EOP Depository when study has been completed.

Transfer to FRC when study has been completed.

Offer to NARS 8 years after the end of the Administration that created the records via SF 258 for each project.

- a. PERMANENT. Records accepted by NARS.
- b. TEMPORARY. Records rejected by NARS. Destroy on completion of action on SF 258.

6. Correspondence files. The correspondence files contain copies of routine inquiries (from the public, referrals from the White House, Congress, and other Government agencies), replies thereto, background materials for formal informational releases and other correspondence in which no unusual administrative decisions, policies, or efforts are involved.

TEMPORARY. Cut-off every 2 years.  
Destroy on site when 2 years old.

7. General Accounting Office (GAO) Reports File. This file is the control set of all GAO reports submitted to the Office of Management and Budget. The file is arranged by agency.

TEMPORARY. Cut-off every fiscal year.  
Transfer to EOP Depository every fiscal year.  
Transfer to FRC every fiscal year.  
Destroy when 5 years old.

Records of the Deputy Director, Executive Associate Directors, Associate Directors, and Assistant Directors

8. Deputy Director, Executive Associate Directors, Associate Directors, and Assistant Directors Files. These files reflect the oversight managerial and budgetary responsibilities of the Deputy Director, Executive Associate Directors, Associate Directors, and Assistant Directors. The files include memoranda to the Director and others on individual programs or issues assigned at this level. The files are arranged alphabetically by subject. *(4 cu. ft/yr).*

PERMANENT. Cut-off every 2 years or upon departure of the individual, whichever is sooner.  
Transfer to EOP Depository every 2 years or upon departure of individual, whichever is sooner.  
Transfer to FRC every 2 years or upon departure of individual, whichever is sooner.  
Officer NARS when 8 years old.

9. Deputy Director, Executive Associate Directors, Associate Directors, and Assistant Directors Chronological Files. These chronological files contain copies of correspondence signed by the Director, Deputy Director, Executive Associate Directors, and Assistant Directors. The files are arranged chronologically by month.

TEMPORARY. Cut-off every 2 years or upon departure of the individual, whichever is sooner.  
Destroy on site every 2 years or upon departure of the individual, whichever is sooner.

Records of the Office of Public Affairs

10. Public Affairs Information Files. These files contain a complete set of formal press releases issued by OMB including such items as testimony before congressional committees or speeches made by principal OMB officials. The files are arranged chronologically by subject. (100-8/21)

PERMANENT. Cut-off every 2 years.  
Transfer to EOP Depository every 2 years.  
Transfer to FRC every 2 years.  
Offer to NARS when 8 years old.

Records of the Office of General Counsel

11. General Counsel Subject Files. These files reflect the General Counsel's responsibilities to provide legal advice to the Director and staff members. The files are arranged alphabetically by subject. (2 cu. ft./yr.).

PERMANENT. Cut-off every 2 years.  
 Transfer to EOP Depository every 2 years.  
 Transfer to FRC every 2 years.  
 Offer to NARS when 8 years old.

12. Litigation Files. The litigation files reflect legal advice and information furnished to the Justice Department for prosecution of lawsuits; including inter- and intra-agency correspondence and related materials.

TEMPORARY. Cut-off file upon termination of litigation.  
 Transfer terminated files to EOP Depository every 2 years.  
 Transfer terminated files to FRC every 2 years.  
 Destroy when 5 years old.

13. Executive Order and Proclamation Files. These files reflect the clearance process, preparation, presentation and publication of Executive Orders and Proclamations. The files are arranged by function and subject thereunder. (1 cu. ft./yr.).

PERMANENT. Cut-off individual file after publication in the Federal Register.  
 Transfer closed files to EOP Depository every 4 years.  
 Transfer closed files to FRC every 4 years.  
 Offer to NARS when 8 years old.

14. Administrative Records. The administrative records relate to the internal organization and management of the Office of General Counsel, including chronological files, work plans, and related records.

TEMPORARY. Cut-off every 2 years.  
 Destroy on site when 2 years old.

Records of the Congressional Relations Office

15. Congressional Inquiries and Referrals Files. These files contain copies of routine inquiries and referrals, replies thereto signed by the Assistant to the Director for Congressional Relations, and other correspondence in which no unusual administrative decisions, policies, or efforts are involved. The files are arranged alphabetically by Senator, Representative, or Committee involved.

TEMPORARY. Cut-off every 2 years.  
Transfer to EOP Depository every 2 years.  
Transfer to FRC every 2 years.  
Destroy when 4 years old.

16. Congressional Relations Subject Files. The files contain information and reference copies of materials prepared within OMB or obtained from other sources such as; the White House, other government agencies, and private industry. The files are arranged alphabetically by subject.

TEMPORARY. Cut-off every 2 years.  
Transfer to EOP Depository every 2 years.  
Transfer to FRC every 2 years.  
Destroy when 4 years old.

17. House and Senate Floor Schedule Files. These files contain lists of current legislation pending before Congress and the Administration's position. The lists are circulated to key OMB and WH officials, and members of Congress.

TEMPORARY. Cut-off at the end of each Congress.  
Destroy on site when 4 years old.

Records of the Budget and Management Office

18. Budget and Management Office Budgetary Files. These files reflect the Budget and Management Office's responsibility associated with the preparation, formulation and execution of the budget submission to the Office of Management and Budget (examining Division - Justice - Treasury, and General Management) and to the Congress for the Office of Management and Budget and the Office of Federal Procurement Policy. The files are arranged by agency and alphabetically by subject thereunder. *(1/2 w. ft./yr.)*

PERMANENT. Cut-off each fiscal year.  
Transfer to EOP Depository when 2 year old.  
Transfer to FRC when 2 years old.  
Offer to NARS when 8 years old.

19. Budget and Management Office Subject Files. These files document the internal administration of the Office of Management and Budget. Included in the files are correspondence, memoranda, reports, studies, circulars and bulletins, and other directives issued by the Office of Management and Budget. The files are arranged alphabetically by subject. *(3 w. ft./yr.)*

PERMANENT. Cut-off every 2 years.  
Transfer to EOP Depository every 2 years.  
Transfer to FRC every 2 years.  
Offer to NARS when 8 years old.