

<b>REQUEST FOR RECORDS DISPOSITION AUTHORITY</b>		JOB NUMBER <i>71-064-04-4</i>	
TO: NATIONAL ARCHIVES & RECORDS ADMINISTRATION 8601 ADELPHI ROAD COLLEGE PARK, MD 20740-6001		Date received <i>3-1-2004</i>	
1 FROM (Agency or establishment) National Archives and Records Administration		NOTIFICATION TO AGENCY  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request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10	
2 MAJOR SUBDIVISION Policy and Communications Staff (NPOL)			
3 MINOR SUBDIVISION			
4. NAME OF PERSON WITH WHOM TO CONFER Laurence C. Patlen	5 TELEPHONE NUMBER 301-837-2038	DATE <i>7-2-04</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 <u>3</u> page(s) are not needed now for the business for 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,  <input checked="" type="checkbox"/> is not required <input type="checkbox"/> is attached, or <input type="checkbox"/> has been requested			
DATE <i>2/25/2004</i>	SIGNATURE OF AGENCY REPRESENTATIVE <i>Laurence C. Patlen</i>		TITLE NARA Records Officer
7 ITEM NO	8 DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)
	<u>Development Function</u>  (See attachment.)		
<i>cc: Agency NR nwmw nwct</i>			

## DEVELOPMENT

The development function coordinated and supported fundraising for museum programs at the National Archives Building, officially, "the National Archives Experience." The records are divided among three *iber*bucket functional areas. Program Administration, Administration and Program Operation.

History: From 1992 to late 1997, the Center for Legislative Archives (NWL) provided operational support to the Foundation for National Archives, a 501c(3) organization. The Development Staff (NDEV) was established January 6, 1997. It mainly provided operational support to the Foundation, per a memorandum of understanding. NDEV was abolished January 26, 2003 after the Foundation assumed all fundraising responsibilities. As of February 2003, NARA's function is limited to managing the Membership and Donor (Raiser's Edge™) database.

### Item 1. File No. xxx: Program administration:

Records created in planning and evaluating NARA's development program. Includes, but not limited to, files relating to: Staff meetings, planning materials, reports and evaluations of fundraising/development activities, and guidance and source materials on the program.

No longer accumulating.

Disposition Cut off annually. Destroy when 3 years old.

### Item 2. File No. xxx: Administrative:

Records created by activities that facilitate the functioning of NARA's development function. Includes, but not limited to, files relating to: office budgeting, office financial transactions, office requisitions / orders for service and supply, office personnel records, travel, transportation, and all other facilitative activities.

No longer accumulating.

- a. All records, excluding files retained by supervisor on individual employees (See item b below).

Disposition: Cut off of at end of FY. Destroy 2 years later

- ~~b. Personnel files. Files retained by supervisor on individual employees.~~

~~Disposition: Follow disposition instructions for file no. 303-1, Employee Name Files.~~

Item 3 File No. xxx: Program operation.

Records created in the course of operating NARA's development program and/or providing support to the Foundation. Including, but not limited to:

-- Records documenting general operations: general planning, implementation and support of a fundraising program for the National Archives Experience; events, exhibitions, openings and other activities where the development program had an interest; providing operations support to the Foundation (e.g., mailing lists and correspondence written on behalf of the Foundation.)

-- Capital donors and annual membership files (correspondence, copies of checks, thank-you letters, and information about donors).

-- Prospects/research files (correspondence and research information on potential donors of capital funds, i e , corporations, foundations or persons).

a. All records, excluding the membership and development database.  
No longer accumulating.

Disposition: Destroy when no longer needed for current operations.

b. Membership and Development Database.

Raiser's Edge database containing donor and membership data.

Disposition: Cut off inactive records (no contributions for 2 years). Delete 3 years after cutoff.

Item 4. File No. xxx: Word Processing Files and E-mail Records.

a. Word Processing Files Documents such as letters, memoranda, reports, handbooks, directives, and manuals recorded on electronic media, such as hard disks or floppy diskettes, after they have been copied to an electronic recordkeeping system, paper, or microform for recordkeeping purposes

Disposition: Delete from the word processing system when no longer needed for updating or revision.

b. E-mail Records. Senders' and recipients' versions of e-mail messages that meet the definition of Federal records, and any attachments to the record messages after they have been copied to an electronic recordkeeping system, paper, or microform for recordkeeping purposes.

Disposition: Delete from the e-mail system after copying to a recordkeeping system.

NOTE: Along with the message text, the recordkeeping system must capture the names of sender and recipients and date (transmission data for recordkeeping purposes) and any receipt data when required.

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