

Request for Records Disposition Authority

Records Schedule Number DAA-0556-2014-0006
Schedule Status Approved

Agency or Establishment Presidio Trust
Record Group / Scheduling Group Records of the Presidio Trust
Records Schedule applies to Agency-wide
Schedule Subject Management and Accountability Records
Internal agency concurrences will be provided No

Background Information Records that document planning, organizing, staffing, directing, internal/external reporting and controlling of Presidio Trust activities that occur routinely. Also included are partnership relationships including collaboration with individuals, organizations, state, and local governments as well as other Federal agencies to enhance and supplement the Presidio Trust resources and activities. NOTE: Records related to Management and Accountability. Do not include contracts relating to work that has an impact upon natural and cultural resources. These are managed under Records Retention Schedule 1 Resource Management and Lands.

Item Count

Number of Total Disposition Items	Number of Permanent Disposition Items	Number of Temporary Disposition Items	Number of Withdrawn Disposition Items
10	3	7	0

GAO Approval

Outline of Records Schedule Items for DAA-0556-2014-0006

Sequence Number	
1	Management and Accountability Significant Program Records Disposition Authority Number: DAA-0556-2014-0006-0001
2	Presidio Trust Federal, State, and Local Government Formal Agreements Disposition Authority Number: DAA-0556-2014-0006-0002
3	Grant Files Disposition Authority Number: DAA-0556-2014-0006-0003
4	Protection and Safety Records Disposition Authority Number: DAA-0556-2014-0006-0004
5	Management and Accountability Administrative Records Disposition Authority Number: DAA-0556-2014-0006-0005
6	Litigation Records Disposition Authority Number: DAA-0556-2014-0006-0006
7	General Counsel Records Disposition Authority Number: DAA-0556-2014-0006-0007
8	Routine Fiscal, Contracting and Purchasing Records Disposition Authority Number: DAA-0556-2014-0006-0008
9	Special events and Hospitality Records Disposition Authority Number: DAA-0556-2014-0006-0009
10	Executive Director's email Disposition Authority Number: DAA-0556-2014-0006-0010

Records Schedule Items

Sequence Number	
1	<p>Management and Accountability Significant Program Records</p> <p>Disposition Authority Number DAA-0556-2014-0006-0001</p> <p>These records consist of the Year End Annual Report to Congress and the Public, Board of Directors' letters of appointment , meeting minutes and resolutions, Presidio Trust organizational charts, Executive Director's orders, policy and procedure documents, strategic plans and studies,the Presidio Trust Strategic Plan, National Historic Preservation Act and National Environmental Policy Act compliance records, minutes of public planning meetings, and Presidio Institute meeting minutes, agendas and reports.</p> <p>Final Disposition Permanent</p> <p>Item Status Active</p> <p>Is this item media neutral? No</p> <p>Explanation of limitation These records exist as PDFs and are available on the Presidio Trust website.</p> <p>Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? Yes</p> <p>Do any of the records covered by this item exist as structured electronic data? No</p> <p>Disposition Instruction</p> <p>Cutoff Instruction Cut off at the end of the calendar year</p> <p>Transfer to the National Archives for Accessioning Transfer to the National Archives 15 year(s) after cut off</p> <p>Additional Information</p> <p>First year of records accumulation 1998</p> <p>What will be the date span of the initial transfer of records to the National Archives? From 1998 To 1999</p> <p>How frequently will your agency transfer these records to the National Archives? Every 1 Years</p>

2

Presidio Trust Federal, State, and Local Government Formal Agreements

Disposition Authority Number **DAA-0556-2014-0006-0002**

These records consist of cooperative agreements between the Presidio Trust and federal, state, and local agencies for critical services such as fire and police protection as well as the execution of projects that benefit the bay area on Presidio property .

Final Disposition **Permanent**

Item Status **Active**

Is this item media neutral? **Yes**

Do any of the records covered
by this item currently exist in
electronic format(s) other than e-
mail and word processing? **No**

Disposition Instruction

Cutoff Instruction **Cut off at the end of the calendar year after
termination of the agreement or completion of the
project.**

Transfer to the National Archives
for Accessioning **Transfer to the National Archives 15 year(s) after cut
off**

Additional Information

What will be the date span of the
initial transfer of records to the
National Archives? **From 1998 To 1999**

How frequently will your agency
transfer these records to the
National Archives? **Every 1 Years**

3

Grant Files

Disposition Authority Number **DAA-0556-2014-0006-0003**

Records related to Federal and private grants given to the Presidio Trust

Final Disposition **Temporary**

Item Status **Active**

Is this item media neutral? **Yes**

Do any of the records covered
by this item currently exist in
electronic format(s) other than e-
mail and word processing? **No**

4

Disposition Instruction

Cutoff Instruction Cutoff at the end of the calendar year upon completion of the work specified in the grant award

Retention Period Destroy 20 year(s) after cutoff

Additional Information

GAO Approval Not Required

Protection and Safety Records

Disposition Authority Number **DAA-0556-2014-0006-0004**

Building occupancy record series that consists of COOP and emergency plans, routine inspection reports, building plans and drawings of life safety systems (including fire alarm systems and sprinkler systems), permits and correspondence.

Final Disposition Temporary

Item Status Active

Is this item media neutral? Yes

Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? No

Disposition Instruction

Cutoff Instruction When superseded.

Retention Period Destroy when obsolete or no longer needed for business purposes.

Additional Information

GAO Approval Not Required

5

Management and Accountability Administrative Records

Disposition Authority Number **DAA-0556-2014-0006-0005**

Records which must be retained on site to conduct business, such as insurance policies and commercial tenant files including letters of intent, correspondence, attorney notes, miscellaneous guaranty of lease and original building leases.

Final Disposition Temporary

Item Status Active

Is this item media neutral? Yes

Do any of the records covered by this item currently exist in

electronic format(s) other than e-mail and word processing?

Disposition Instruction

Cutoff Instruction

Cut off at the end of the calendar year

Retention Period

Destroy no sooner than three years after cut off or when superseded, obsolete or no longer needed for current agency business

Additional Information

GAO Approval

Not Required

Litigation Records

Disposition Authority Number

DAA-0556-2014-0006-0006

These records include Equal Employee Opportunity claim files, federal tort claim records, and Human Resources grievance claims sent to EEO.

Final Disposition

Temporary

Item Status

Active

Is this item media neutral?

Yes

Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing?

No

Disposition Instruction

Cutoff Instruction

Cut off at the end of the calendar year after settlement

Retention Period

Destroy 25 year(s) after cut off

Additional Information

GAO Approval

Not Required

General Counsel Records

Disposition Authority Number

DAA-0556-2014-0006-0007

These consist of General Counsel records including claims issues that do not get litigated but are resolved at the agency administrative level, routine policy decisions, day-to-day planning, and operations records. They document the General Counsel's office participation in these matters.

Final Disposition

Temporary

Item Status

Active

Is this item media neutral?

Yes

6

7

Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? No

Disposition Instruction

Cutoff Instruction Cut off at the end of the calendar year after resolution of the matter

Transfer to Inactive Storage Transfer to the FRC five years after cut off

Retention Period Destroy 15 year(s) after cut off

Additional Information

GAO Approval Not Required

8 **Routine Fiscal, Contracting and Purchasing Records**

Disposition Authority Number DAA-0556-2014-0006-0008

Fiscal and contracting records include travel vouchers, purchase orders, contracts, etc.

Final Disposition Temporary

Item Status Active

Is this item media neutral? Yes

Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? No

Disposition Instruction

Cutoff Instruction Cut off at the end of the calendar year

Transfer to Inactive Storage Transfer to the FRC 2 years after cut off

Retention Period Destroy 15 year(s) after cut off

Additional Information

GAO Approval Not Required

9 **Special events and Hospitality Records**

Disposition Authority Number DAA-0556-2014-0006-0009

Hospitality records include permits for renting Presidio of San Francisco venues, which include signed document, and insurance form. Information is organized by event date, then name of permit holder/event.

Final Disposition Temporary

	Item Status	Active
	Is this item media neutral?	Yes
	Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing?	No
	Disposition Instruction	
	Cutoff Instruction	Cut off at the end of the calendar year. Maintain on site for 10 years after permit expiration.
	Retention Period	Destroy 15 year(s) after cut off
	Additional Information	
	GAO Approval	Not Required
10	Executive Director's email	
	Disposition Authority Number	DAA-0556-2014-0006-0010
	All incoming and outgoing emails.	
	Final Disposition	Permanent
	Item Status	Active
	Is this item media neutral?	No
	Explanation of limitation	These are email records.
	Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing?	No
	Disposition Instruction	
	Cutoff Instruction	Cutoff at the end of the calendar year.
	Transfer to the National Archives for Accessioning	Transfer to the National Archives 15 year(s) after cutoff
	Additional Information	
	What will be the date span of the initial transfer of records to the National Archives?	From 2001 To 2002
	How frequently will your agency transfer these records to the National Archives?	Every 1 Years

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 in this schedule are not now needed for the business of the agency or will not be needed after the retention periods specified.

Signatory Information

Date	Action	By	Title	Organization
07/14/2014	Certify	Barbara Janis	Librarian and Records Manager	External Affairs - Library
07/15/2014	Return for Revision	Kate Flaherty	Appraiser	National Archives and Records Administration - Records Management Services
07/29/2014	Submit For Certification	Barbara Janis	Librarian and Records Manager	External Affairs - Library
07/29/2014	Certify	Barbara Janis	Librarian and Records Manager	External Affairs - Library
07/31/2014	Return for Revision	Kate Flaherty	Appraiser	National Archives and Records Administration - Records Management Services
07/31/2014	Submit For Certification	Barbara Janis	Librarian and Records Manager	External Affairs - Library
07/31/2014	Certify	Barbara Janis	Librarian and Records Manager	External Affairs - Library
08/01/2014	Return for Revision	Kate Flaherty	Appraiser	National Archives and Records Administration - Records Management Services
08/01/2014	Submit For Certification	Barbara Janis	Librarian and Records Manager	External Affairs - Library
08/01/2014	Certify	Barbara Janis	Librarian and Records Manager	External Affairs - Library
08/07/2014	Return for Revision	Kate Flaherty	Appraiser	National Archives and Records Administration - Records Management Services
08/07/2014	Submit For Certification	Barbara Janis	Librarian and Records Manager	External Affairs - Library

08/07/2014	Certify	Barbara Janis	Librarian and Records Manager	External Affairs - Library
02/03/2015	Submit for Concurrence	Kate Flaherty	Appraiser	National Archives and Records Administration - Records Management Services
02/04/2015	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - Records Management Services
02/04/2015	Concur	Laurence Brewer	Director, National Records Management Program	National Archives and Records Administration - National Records Management Program
02/05/2015	Approve	David Ferriero	Archivist of the United States	Office of the Archivist - Office of the Archivist