

Request for Records Disposition Authority (See Instructions on reverse)		Leave Blank (NARA Use Only)	
To National Archives and Records Administration (NIR) Washington, DC 20408		Job Number N1-556-11-1	
1 From (Agency or establishment) Presidio Trust		Date Received 3/17/2011	
2 Major Subdivision		<b>Notification to Agency</b> 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request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10	
3 Minor Subdivision		Date 4/17/2011	
4 Name of Person with whom to confer Barbara Janis		Archivist of the United States <i>[Signature]</i>	
5 Telephone (include area code) 415-561-5343			
<b>6 Agency Certification</b> 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>4</u> 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 <input checked="" type="checkbox"/> is not required <input type="checkbox"/> is attached <input type="checkbox"/> has been requested			
Signature of Agency Representative <i>Barbara Janis</i>		Title Library and Records Manager	Date (mm/dd/yyyy) 03/17/2011
7 Item Number	8 Description of Item and Proposed Disposition	9 GRS or Superseded Job Citation	10 Action taken (NARA Use Only)
	Schedule 5 Information and Public Image Management Records This schedule includes 1 Management of Presidio Trust data and information resources, and 2 Public image management, which includes development of graphic standards used to portray a consistent image of The Presidio Trust in publications, websites, signs, and uniforms	GRS 14, 16 24 as specified in the attached crosswalk	

# Draft Presidio Trust Records Retention Schedule 5

Status: Pending      Date: March 2011

This schedule covers all records regardless of media (media neutral), including web content

## INFORMATION AND PUBLIC IMAGE MANAGEMENT RECORDS

### Description

**Function:** This category includes

- 1 Management of Presidio Trust data and information resources, and
- 2 Public image management, which includes development of graphic standards used to portray a consistent image of The Presidio Trust in publications, websites, signs, and uniforms.

**Activities Related to Information Management** include indexing, storage, and retrieval of Information technology systems, databases, enterprise architecture, capital planning, etc. Also covers records management and related records

• **Records Related to Information Management** include, but are not limited to:

- Administrative records, including paid advertising and Federal Register announcements
- Correspondence
- Electronic records management
- Forms management
- Freedom of Information Act (FOIA) records
- Hardware maintenance files
- Help desk requests
- Library administration files
- Mail management
- Network administration files
- Policies and Procedures records
- Privacy Act-related records
- Records management documents for scheduling, storage, and transfer of records
- Reports
- Software licenses
- System planning records



**Activities Related to Public Image Management** include developing standards that help portray a consistent image in publications, uniforms, websites, signs and all other outreach products. Also includes media relations, public outreach, briefings, speeches, and related activities.

• **Records Related to Public Image Management** include, but are not limited to:

- Announcements and flyers
- Media correspondence
- Media Press kits
- Newsletters (external and internal)
- Posters
- Press releases
- Public notices
- Publications: annual reports, water quality reports, project updates
- Recordings and interviews of radio and television appearances by Presidio Trust representatives
- Standards for signs, uniforms and related items
- Standards on use of Presidio Trust logos
- Style guidelines
- Vendor services for media

## **Retention Plan**

### **Permanent Records Criteria**

Records that document an activity which meets one or more of the following criteria are Permanent:

- Communication of the Presidio Trust mission, the dissemination of Presidio Trust information, and the conveyance of Presidio Trust positions and statements
- Documentation of computer systems in any category that contain permanent records
- "First of a kind" activity or establishes precedents
- Policy and procedures for directing Information and Public Image Management

- Subject of widespread media attention or Congressional scrutiny

ITEM 1

A.1

**Permanent Information & Public Image Management Policy Records:** Records that help manage and set direction for system development and public image

**NOTE** Documentation records of computer systems in any category that contain permanent records will be transferred with the system

Current Volume 1 cubic feet

Annual Accumulation 1/16 cubic feet

Date Span 1999-2010

Estimated Date of First Accession June 2011

**Disposition Instructions:**

**Cutoff:** Close file at the end of each calendar year

**Transfer** permanent special media and electronic records along with any finding aids or descriptive information (including linkage to the original file) and related documentation by calendar year to the National Archives when 3 years old. Digital records will be transferred in an acceptable format following standards applicable at the time

**Transfer** all other permanent records to NARA 15 years after close

ITEM 2

A.2

**Permanent Information & Public Image Management Mission Records :** Records that document the communication of the Presidio Trust mission, the dissemination of Presidio Trust information, and the conveyance of Presidio Trust positions and statements

Current Volume 2 cubic feet

Annual Accumulation 1/8 cubic feet

Date Span 1999-2010

Estimated Date of First Accession June 2011

**Disposition Instructions:**

**Cutoff:** Close file at the end of each calendar year

**Transfer** permanent special media and electronic records along with any finding aids or descriptive information (including linkage to the original file) and related documentation by calendar year to the National Archives when 3 years old. Digital records will be transferred in an acceptable format following standards applicable at the time

**Transfer** all other permanent records to NARA 15 years after close.

ITEM 3

B

**Long-term Temporary Information and Public Image Management Records:** Records that document system administration, records management, and public information functions that do not meet the criteria listed above

**Disposition Instructions:**

Cut off the file at the end of each calendar year **Destroy/delete** records 15 years after cutoff

ITEM 4

C

**Short-term Temporary Information and Public Image Management Records:** Records regarding development of publications, and library activities that do not meet the criteria for permanent records listed above. Also includes Freedom of Information act and Privacy Act requests.

**Disposition Instructions:**

Cut off the file at the end of each calendar year **Destroy/delete** records 7 years after cutoff

ITEM 5

D

**Routine Temporary Information and Public Image Management Records:** Records dealing with help desk, hardware/software maintenance, meeting arrangements, requests for information, and all other routine, housekeeping and supporting documentation not addressed elsewhere in this category

**Disposition Instructions:**

Cut off the file at the end of each calendar year **Destroy/delete** records 3 years after cutoff

**Authorities:** The Presidio Trust Act, Freedom of Information Act, Privacy Act

**Presidio Trust Approval Date:**

**NARA Approval Date:**