

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 N1-556-11-2	
1 From (Agency or establishment) The Presidio Trust		Date Received 4/19/2011	
2 Major Subdivision		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request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10	
3 Minor Subdivision		Date 4/19/2011	Archivist of the United States <i>[Signature]</i>
4 Name of Person with whom to confer Barbara Janis	5 Telephone (include area code) 415-561-5343		
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>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>[Signature]</i>	Title Librarian and Records manager	Date (mm/dd/yyyy) 04/13/2011	
7 Item Number	8 Description of Item and Proposed Disposition	9 GRS or Superseded Job Citation	10 Action taken (NARA Use Only)
	Schedule 4 Interpretation and Education Records This schedule includes interpretive and education programs for park visitors developed by The Presidio Trust and its partners		

Draft Presidio Trust Records Retention Schedule 4

Status: Pending **Date:** April 2011

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

INTERPRETATION AND EDUCATION RECORDS

Description

Function: Interpretive and educational programs for park visitors developed by The Presidio Trust and its partners

Activities Relating to Interpretation and Education includes programs that typically foster the development of a citizen stewardship ethic and promote recreational activities, and instill an understanding, appreciation, and enjoyment of the significance of The Presidio of San Francisco and its resources. These programs open dialogues about Presidio resources, history, and mission with local communities and visitors. Examples of interpretive and education programs include

- Curriculum-based educational programs
- Exhibits
- Guided tours and hikes
- Internship programs
- Interpretive and informational talks to park visitors
- Public programs, i.e. celebrations, annual events
- Trainings for teachers, volunteers, docents, and staff
- Volunteer programs

Records Relating to Interpretation and Education Activities include, but are not limited to

- Announcements and flyers
- Brochures and other publications
- Classroom curricula and lesson plans
- Contracts with partners and vendors
- Correspondence

- Exhibit scripts and other documentation
- Films
- Oral histories
- Photographic negatives, prints, slides, motion pictures, and electronic media
- Planning documents
- Radio and television programs produced by Presidio Trust staff
- Recordings of public programs
- Reports
- Research and studies
- Teachers' guides and activity packets
- Transcripts of talks, videos
- Wayside documentation

Retention Plan

A. Permanent Records Criteria

Records that document the planning, development, and the management of interpretive and educational activities which meet one or more of the following criteria are Permanent

- Development of exhibit scripts and lesson plans for major educational or interpretive installations
- Documentation of computer systems in any category that contain permanent records
- Documentary photographs and films of natural and cultural resources
- "First of a kind" activity or establishes precedent
- High-level Presidio Trust personnel, and significant visitors, and historic ceremonies, dedications and events
- Materials essential for understanding substantive policy development, long-term planning, and/or results of studies, surveys, projects
- Policy and procedures for interpretation and education

- Produces major contributions to scientific or historic knowledge
- Production of unique informational products, such as maps and brochures
- Special park uses, bearing on the unique responsibilities, programs and activities relating the mission of the Presidio Trust and its custodianship of The Presidio of San Francisco
- Subject of widespread media attention or Congressional scrutiny

NOTE: These may include press releases, maps, radio and television activities, newsletters, special articles, video, web content, posters, etc

ITEM 1

A.1 Permanent Interpretation and Education Planning Records Records that document planning and development of Interpretation and Education policies, programs, and activities, and related documents that meet the criteria above

Current Volume 1 cubic foot
 Annual Accumulation 1/16 cubic foot
 Date Span 1999 to present
 Estimated Date of First Accession May 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

Retire all other permanent records to offsite storage 5 years after cutoff

Transfer all other permanent records to NARA 15 years after cutoff

ITEM 2 A.2

Permanent Interpretation and Education Work Product Records: Work products including but not limited to publications, presentations, exhibit scripts, audio-visual materials, studies, lesson plans, curricula, brochures and wayside documentation (only one record copy needs to be retained permanently)

Current Volume 2 cubic feet
 Annual Accumulation ½ cubic foot
 Date Span 1999 - present
 Estimated Date of First Accession May 2011

Disposition Instructions:

Cutoff: Close file at the conclusion of the project/program

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

Retire all other permanent records to offsite storage 5 years after cutoff

Transfer all other permanent records to NARA 15 years after cutoff

ITEM 3 B.

Long-term Temporary Interpretation and Education Records: Drafts and other non-record instances of exhibit scripts, curricula, speeches, lesson plans, brochures, publications, audio-visual materials, studies, wayside documentation, catalog information on library materials, artifact collections and similar items maintained for interpretive programs, documents related to designing and building exhibits

Disposition Instructions:

Cutoff: Close file at the end of each calendar year

Destroy/delete records 15 years after closure

ITEM 4 C.

Short-term Temporary Interpretation and Education Records: Volunteer records and other planning records that do not meet the criteria for permanent records listed above, including timesheets and supporting records for Interpretation and Education activities

Disposition Instructions:

Cutoff: Close file at the end of each calendar year

Destroy/delete records 7 years after closure

ITEM 5 D.

Routine Temporary Interpretation and Education Records: All other routine, housekeeping, and supporting documentation not addressed elsewhere in this category

Disposition Instructions:

Cutoff: Close file at the end of each calendar year

Destroy/delete records 3 years after closure

Authorities: The Presidio Trust Act (16 U S C § 460bb appendix, Section 102(b))

Presidio Trust Approval Date:

Presidio Trust Bucket 4 Interpretation and Education

Item No & Title	RETENTION	FILE CODE	SERIES TITLE	DISPOSITION INSTRUCTIONS	Old	Item# OLD Dispositions
4 A1 Permanent records document planning activities Records that document the planning, development, and the management of interpretation and education policies, programs, and activities and related documents	PERMANENT			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 Retire all other permanent records to offsite storage 5 years after cutoff Transfer all other permanent records to NARA 15 years after cutoff		
		ARC-400	Education and outreach records [program planning, data, needs]			
		NAT-400	Educational activities [trainings for staff, docents, volunteers]			
		NAT-410	Educational Services [workshops, walks, talks, programs]			
		NAT-420	Education planning (data, needs)			
		PPG-200	Guidelines/procedures			
		PPG-300	Interpretative and educational activities (lesson plans, trainings for teachers and/or docents)			
		PPG-310	Interpretative and educational services [workshops]			
		PPG-320	Interpretative and educational planning (data, needs)			
		PPG-400	Public programs [lectures, concerts, theater, film, festivals, ceremonies]			
		PPG-500	Exhibits			
4 A2 Permanent records that document work products produced by Interpretation and Educational activities Work products including but not limited to publications, presentations, exhibit scripts, audio-visual material, studies, lesson plans, curricula, brochures, and wayside documentation	PERMANENT			Close file at the conclusion of the project/program Trasfer permanent special media and electronic records along with any finding aids or descriptive information 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 applicatable at the the time Retire all other permanet records to offsite storage 5 years after cutoff		

		ARC-420	Exhibit records (lesson plans, photographs, contracts and procurement records, conceptual and schematic design development, construction documents, event information (openings, special events) and attendance records	
		PPG-100	Correspondence, if significant	
		PPG-510	Wayside	
		PPG-600	Oral Histories	
4 B Temporary records of preliminary stages of work products Drafts and other non-record instances of exhibit scripts, curricula, lesson plans, brochures, publications, lesson plans, brochures, publications, audio-visual materials, studies, wayside documentation, catalog information on library materials, artifact collections and similar items maintained for interpretive programs, as well as documents related to designing and building exhibits	Temporary, 15 years			Cutoff Close file at the end of each calendar year Destroy/delete records 15 years after closure
		ARC-440	Archaeology preliminary work products	
		PPG-410	Public Programs Preliminary work products	
		NAT-440	Natural Resources preliminary work products	
4 C Temporary records of planning materials such as time sheets, photographs for interpretative programs)	Temporary 7 years			TEMP Destroy 7 years after volunteer involvement ceases
		ARC-410	Volunteer Records (Planning records, timesheets, photographs)	
4.D 4E Temporary records not addressed elsewhere All other routine, housekeeping, and supporting documentation not addressed elsewhere in this category	Temporary, 3 years			Cutoff Close file at the end of each calendar year Destroy/delete records 3 years after closure
		ARC-430	Routine housekeeping and supporting documentation not addressed elsewhere in this category	
		NAT-420	Routine housekeeping and supporting documentation not addressed elsewhere in this category	
		PPG-110	Correspondence, general	
		PPG-330	Routine housekeeping and supporting documentation not addressed elsewhere in this category	