

## Request for Records Disposition Authority

Records Schedule Number      **DAA-0378-2014-0001**  
Schedule Status                      **Approved**  
  
Agency or Establishment              **Economic Development Administration**  
Record Group / Scheduling Group      **Records of the Economic Development Administration**  
Records Schedule applies to              **Major Subdivision**  
Major Subdivision                      **Office of the Assistance Secretary and the Deputy Assistant Secretary/Chief Operating Officer**  
Schedule Subject                      **Records of the Office of the Assistant Secretary**  
Internal agency concurrences will be provided      **No**

Background Information              **The Office of the Assistant Secretary includes the PAS Assistant Secretary, the Deputy Assistant Secretary and COO, and Senior Adviser. The office is responsible for developing agency policy, strategic plans, and approving budget submissions to the Department.**

### Item Count

Number of Total Disposition Items	Number of Permanent Disposition Items	Number of Temporary Disposition Items	Number of Withdrawn Disposition Items
<b>7</b>	<b>3</b>	<b>4</b>	<b>0</b>

### GAO Approval

## Outline of Records Schedule Items for DAA-0378-2014-0001

Sequence Number	
1	Invitations: Disposition Authority Number: DAA-0378-2014-0001-0001
2	Daily Schedules of the Assistant Secretary Disposition Authority Number: DAA-0378-2014-0001-0002
3	Assistant Secretary's Briefing Books Disposition Authority Number: DAA-0378-2014-0001-0003
4	High Level Communiques Disposition Authority Number: DAA-0378-2014-0001-0004
5	Agency Performance Reports Disposition Authority Number: DAA-0378-2014-0001-0005
6	Briefing Materials for the Deputy Assistant Secretary and others Disposition Authority Number: DAA-0378-2014-0001-0006
7	Weekly Reports Disposition Authority Number: DAA-0378-2014-0001-0007

## Records Schedule Items

Sequence Number	
1	<p><b>Invitations:</b></p> <p>Disposition Authority Number    <b>DAA-0378-2014-0001-0001</b></p> <p><b>Routine invitations to attend, participate, and/or speak at meetings, conferences, seminars, social gatherings, and similar events.</b></p> <p>Final Disposition                      <b>Temporary</b></p> <p>Item Status                                <b>Pending</b></p> <p>Is this item media neutral?            <b>Yes</b></p> <p>Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing?        <b>Yes</b></p> <p>Do any of the records covered by this item exist as structured electronic data?                            <b>No</b></p> <p><b>Disposition Instruction</b></p> <p>Cutoff Instruction                        <b>Cut off at the end of the calendar year</b></p> <p>Retention Period                         <b>Destroy 3 year(s) after cut off</b></p> <p><b>Additional Information</b></p> <p>GAO Approval                              <b>Not Required</b></p>
2	<p><b>Daily Schedules of the Assistant Secretary</b></p> <p>Disposition Authority Number        <b>DAA-0378-2014-0001-0002</b></p> <p><b>Assistant Secretary's schedule of meetings, events, and arrangements.</b></p> <p>Final Disposition                        <b>Temporary</b></p> <p>Item Status                                <b>Pending</b></p> <p>Is this item media neutral?            <b>Yes</b></p> <p>Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing?        <b>No</b></p> <p><b>Disposition Instruction</b></p> <p>Cutoff Instruction                        <b>Cut off at end of official's tenure in office</b></p> <p>Retention Period                         <b>Destroy 3 year(s) after cut off</b></p>

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**Additional Information**

GAO Approval **Not Required**

**Assistant Secretary's Briefing Books**

Disposition Authority Number **DAA-0378-2014-0001-0003**

**Briefings on important issues, meetings, and trips prepared by various offices and contain: schedules, agendas, topics of discussions, issue and talking points, biographies, information and background on locations visited and issues.**

Final Disposition **Permanent**

Item Status **Pending**

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 and the end of the official's tenure**

Transfer to Inactive Storage **Transfer to FRC after cut off**

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

**Additional Information**

First year of records accumulation **2003**

What will be the date span of the initial transfer of records to the National Archives? **From 2003 To 2009**

How frequently will your agency transfer these records to the National Archives? **Unknown**  
**We will maintain these records while an assistant secretary is in office, and then transfer once they have resigned.**

	Estimated Current Volume	Annual Accumulation
<b>Electronic/Digital</b>		
<b>Paper</b>	<b>30 Cubic feet</b>	<b>5 Cubic feet</b>
<b>Microform</b>		

<b>Hardcopy or Analog Special Media</b>		
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**High Level Communiques**

Disposition Authority Number **DAA-0378-2014-0001-0004**

**High level correspondence and e-mails relating to policy, priorities, legislative initiatives and programmatic changes of the agency.**

Final Disposition **Permanent**

Item Status **Pending**

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 files at the end of a calendar year**

Transfer to Inactive Storage **Transfer to FRC 4 years after cutoff**

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

**Additional Information**

First year of records accumulation **2000**

What will be the date span of the initial transfer of records to the National Archives? **From 2000 To 2009**

How frequently will your agency transfer these records to the National Archives? **Every 4 Years**

	Estimated Current Volume	Annual Accumulation
<b>Electronic/Digital</b>		
<b>Paper</b>	<b>1 Cubic feet</b>	<b>1 Cubic feet</b>
<b>Microform</b>		

<b>Hardcopy or Analog Special Media</b>		
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**Agency Performance Reports**

Disposition Authority Number **DAA-0378-2014-0001-0005**

**Balance Scorecard and related performance reports documenting EDA's achievement of goals and objectives.**

Final Disposition **Permanent**

Item Status **Pending**

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**

GRS or Superseded Authority Citation **NC1-378-79-2 Item 165**

**Disposition Instruction**

Cutoff Instruction **Cut off 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**

First year of records accumulation **2003**

What will be the date span of the initial transfer of records to the National Archives? **From 2003 To 2004**

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

	Estimated Current Volume	Annual Accumulation
<b>Electronic/Digital</b>		
<b>Paper</b>	<b>8 Cubic feet</b>	<b>1 Cubic feet</b>
<b>Microform</b>		

<b>Hardcopy or Analog Special Media</b>		
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6 **Briefing Materials for the Deputy Assistant Secretary and others**

Disposition Authority Number **DAA-0378-2014-0001-0006**

**Briefings on important issues, meetings, and trips prepared by various offices and contain: schedules, agendas, topics of discussions, issue and talking points, biographies, information and background on locations visited and issues.**

Final Disposition **Temporary**

Item Status **Pending**

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**

Retention Period **Destroy 5 year(s) after cut off**

**Additional Information**

GAO Approval **Not Required**

7 **Weekly Reports**

Disposition Authority Number **DAA-0378-2014-0001-0007**

**Weekly reports submitted by all divisions and regional office of EDA. They document the meetings and conferences attended by EDA staff as well as potential grant problems and success stories from grantees.**

Final Disposition **Temporary**

Item Status **Pending**

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**

Retention Period **Destroy 5 year(s) after cut off**

Additional Information

GAO Approval

**Not Required**

## 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
11/04/2013	Certify	Malinda Matson	Congressional Affairs Specialist	Economic Development Administration - Legislative Affairs
11/21/2013	Return for Revision	John Hulmston	Senior Records Analyst	National Archives and Records Administration - Records Management Services
11/21/2013	Submit For Certification	Malinda Matson	Congressional Affairs Specialist	Economic Development Administration - Legislative Affairs
11/21/2013	Certify	Malinda Matson	Congressional Affairs Specialist	Economic Development Administration - Legislative Affairs
11/21/2013	Return for Revision	John Hulmston	Senior Records Analyst	National Archives and Records Administration - Records Management Services
11/22/2013	Submit For Certification	Malinda Matson	Congressional Affairs Specialist	Economic Development Administration - Legislative Affairs
11/22/2013	Certify	Malinda Matson	Congressional Affairs Specialist	Economic Development Administration - Legislative Affairs
03/20/2014	Return for Revision	John Hulmston	Senior Records Analyst	National Archives and Records Administration - Records Management Services
03/21/2014	Submit For Certification	Malinda Matson	Congressional Affairs Specialist	Economic Development Administration - Legislative Affairs
03/21/2014	Certify	Malinda Matson	Congressional Affairs Specialist	Economic Development Administration - Legislative Affairs

04/08/2014	Return for Revision	John Hulmston	Senior Records Analyst	National Archives and Records Administration - Records Management Services
04/09/2014	Submit For Certification	Malinda Matson	Congressional Affairs Specialist	Economic Development Administration - Legislative Affairs
04/09/2014	Certify	Malinda Matson	Congressional Affairs Specialist	Economic Development Administration - Legislative Affairs
06/25/2014	Submit for Concurrence	John Hulmston	Senior Records Analyst	National Archives and Records Administration - Records Management Services
06/26/2014	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - Records Management Services
06/26/2014	Concur	Laurence Brewer	Director, National Records Management Program	National Archives and Records Administration - National Records Management Program
06/27/2014	Approve	David Ferriero	Archivist of the United States	Office of the Archivist - Office of the Archivist