

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0420-2025-0001

Status: APPROVED
Date Approved: 04/22/2026

General Information

Agency or Establishment	U.S. International Development Finance Corporation
Record/Scheduling Group	0420 - Records of the United States International Development Finance Corporation
Records Schedule Applies To	Agency-wide
Schedule Subject	Records of the International Development Finance Corporation
Additional Schedule Information	<p>On October 5, 2018, Congress passed the Better Utilization of Investments Leading to Development (BUILD) Act (Public Law No: 115-254). This act created the United States International Development Finance Corporation (“DFC”), consolidating OPIC (the Overseas Private Investment Corporation) with USAID’s Development Credit Authority, while introducing new and innovative financial products to better bring private capital to the developing world. The agency officially stood up on December 20, 2019, when Congress passed the FY20 appropriations bill (Public Law 116-93). The International Development Finance Corporation (DFC) is the U.S. Government’s development finance institution. DFC partners with the private sector to finance solutions to the most critical challenges facing the developing world today.</p>
Is There a Classified Version of This Schedule?	No
Is consultation and coordination with Tribal Governments required?	No - the records covered by this schedule do not implicate Tribal interests

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Item Count

Total number of disposition items: 31

Number of Temporary disposition items: 14

Number of Permanent disposition items: 17

Number of Items with Disposition Not Approved: 0

Number of Inactive disposition items: 0

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Outline of Records Schedule Items for DAA-0420-2025-0001

Item #	Title	Disposition
	Mission Records	
0001	Mission Records : Office of the General Counsel Records : Legal Opinions	Permanent
0002	Mission Records : Office of the General Counsel Records : Special Studies	Permanent
0003	Mission Records : Office of the General Counsel Records : Country Records	Permanent
0004	Mission Records : Office of the General Counsel Records : Claims Case Records	Permanent
0005	Mission Records : Office of the Chief Executive Officer Records : Policy and Procedure Records	Permanent
0006	Mission Records : Office of the Chief Executive Officer Records : Exposure Management Committee Files	Temporary
0007	Mission Records : Office of the Chief Executive Officer Records : Investment Committee Files	Temporary
0008	Mission Records : Office of the Chief Executive Officer Records : Office of the Chief Executive Program Files	Permanent
0009	Mission Records : Board of Directors Records : Board Briefings	Permanent
0010	Mission Records : Board of Directors Records : Board of Directors Meeting Minutes/Ballots	Permanent
0011	Mission Records : Board of Directors Records : Board of Directors Meeting Resolutions	Permanent
0012	Financial Transaction Records : Finance Project Records	Temporary
0013	Financial Transaction Records : Insurance Project Records	Temporary
0014	Financial Transaction Records : Investment Fund Records	Temporary
0015	Financial Transaction Records : Equity Investment Records	Temporary
0016	Financial Transaction Records : Canceled, Withdrawn, or Rejected Finance Project, Insurance Project, Investment Funds, and Equity Investment Application Files	Temporary

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0017	Program Office Records : Risk Sharing & Retention Agreement Files	Permanent
0018	Program Office Records : Feasibility Studies	Temporary
0019	Program Office Records : Briefing Reports for Investment Missions	Temporary
0020	Program Office Records : Organizational Charts-Permanent	Permanent
0021	Program Office Records : Organizational Charts-Temporary	Temporary
0022	Program Office Records : Memorandums of Understanding (MOUs)	Temporary
0023	Program Office Records : Portfolio Performance Evaluations	Temporary
0024	External Affairs Records : Press Releases and Media Fact Sheets	Permanent
0025	External Affairs Records : Congressional Affairs Records	Temporary
0026	External Affairs Records : Senate and House Committee Files	Temporary
0027	External Affairs Records : Speeches	Permanent
0028	External Affairs Records : Publications	Permanent
0029	External Affairs Records : Press Conference Files	Permanent
0030	External Affairs Records : Official Biographies and Photos	Permanent
0031	External Affairs Records : Congressional Confirmation Hearing Files	Permanent

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Records Schedule Items

Group Title	Mission Records : Office of the General Counsel Records
Group Description	The Office of the General Counsel provides legal counsel to the Board of Directors and senior management, legal support for all financial transactions, interpretation and advice on legal issues affecting DFC, interpretation and advice on all general administration and management laws, assistance with Freedom of Information Act requests, and the negotiation of bilateral agreements.
DAA-0420-2025-0001-0001	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Legal Opinions
Item Description	These files consist of legal opinions and interpretations on all matters relating to the administration and operation of DFC. Records include contract actions, legislative interpretation and support, negotiation of bilateral agreements, and interpretation and advice on all general administration and management laws. Arranged chronologically.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:100GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1

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Are any of the records covered by this item subject to a FOIA exemption?	Yes
FOIA Exemption(s)	FOIA (b)(4) Trade Secrets and Commercial or Financial Information, FOIA (b)(5) Inter-agency or Intra-agency Memorandums or Letters Not Available by Law
DAA-0420-2025-0001-0002 STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Special Studies
Item Description	These records include correspondence, reports, contracts to publish the research and publish the special reports, DFC review documentation and reports on topics of special interest to DFC, such as worker rights or a biodiversity study. Arranged by subject.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:50GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	Yes
FOIA Exemption(s)	FOIA (b)(5) Inter-agency or Intra-agency Memorandums or Letters Not Available by Law
DAA-0420-2025-0001-0003 STATUS: Active	

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Records Schedule Number: DAA-0420-2025-0001

Status: APPROVED
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ITEM GENERAL INFORMATION	
Item Title	Country Records
Item Description	These files consist of bilateral international agreements under which DFC operates in other countries together with related papers showing negotiations, implementing arrangements, and other bilateral issues. Agreements are filed by region of the world such as Asia and the Pacific, Africa and the Middle East, and Latin America and the Caribbean.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:200GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	No
DAA-0420-2025-0001-0004 STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Claims Case Records
Item Description	Records relating to investment insurance and reinsurance claims paid, settled, or rejected together with related arbitration or litigation records. Contains correspondence, motions, hearings, court proceedings, reports from various consultants concerning the values of the projects, amounts requested and paid or settled and any internal approval memoranda in respect of same. Arranged by case.

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Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:100GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	Yes
FOIA Exemption(s)	FOIA (b)(4) Trade Secrets and Commercial or Financial Information, FOIA (b)(5) Inter-agency or Intra-agency Memorandums or Letters Not Available by Law

Group Title	Mission Records : Office of the Chief Executive Officer Records
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Group Description	The Chief Executive Officer is appointed by the President of the United States and is responsible for the operations and management of DFC and reports to and is under the direct authority of the Board of Directors as well as serves on the Board. The CEO's responsibilities include: implementing the mission and strategic initiatives of DFC as set forth in the BUILD Act, managing all aspects of DFC's programmatic, transactional, and administrative functions consistent with the BUILD Act and other applicable federal law, establishing the organizational structure of DFC, and communicating and building relationships with DFC's stakeholders, including relevant US government agencies, Congressional and Senate committees, foreign governments, the business community, and non-governmental organizations.
DAA-0420-2025-0001-0005 STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Policy and Procedure Records
Item Description	Records related to formal policies and procedures internal to the agency that require the approval of the Chief Executive Officer. These include, but are not limited to Programmatic Directives, Administrative Directives, and Office Function Directives.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:50GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1

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Are any of the records covered by this item subject to a FOIA exemption?	No
DAA-0420-2025-0001-0006	
STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Exposure Management Committee Files
Item Description	The role of the Exposure Management Committee is to actively manage DFC portfolio risk, as well as make recommendations to the Chief Executive Officer toward balancing financial risk with development returns. Records include memorandums with management committee minutes, notes, executive summaries, country background information, conclusions, recommendations, and decision points. Reports to the committee are quarterly and discuss countries that require a change in country status. The country status reflects whether a country is a risk to do business with and there are levels of risk. Changes in country status are determined by executive branch measures, foreign or domestic legislation, and Administration priorities. Any changes to country status are reflected on the DFC Intranet site under the “Country Status” application page.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year.
Retention Period	Destroy 7 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0007	
STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Investment Committee Files

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Item Description	These records consist of agendas and papers presented to the Investment Committee, summary discussion notes (attendance, summary of issues discussed), records of votes and approvals of the Committee that consists of the Executive Staff (as designated by the Chief Executive Officer). Reports to the committee can include but are not limited to a report on the development impact of the project, a report on the creditworthiness of the project, and a report on any external affairs issues of the project. Investment projects include but are not limited to equity investment, insurance and reinsurance support, and local currency loans. Arranged chronologically by year, and after by project.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year.
Retention Period	Destroy 7 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0008	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Office of the Chief Executive Program Files
Item Description	Correspondence files of all Executive Office Staff. These files document DFC decisions in daily operations, as well as Executive Chronology and subject files. Correspondence can be print and file or paper mail that has been scanned. Types of correspondence can include but are not limited to letters from members of Congress, foreign dignitaries, and Non-Governmental Organizations (NGOs). Arranged chronologically or by subject.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	

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Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:200GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	Yes
FOIA Exemption(s)	FOIA (b)(4) Trade Secrets and Commercial or Financial Information, FOIA (b)(5) Inter-agency or Intra-agency Memorandums or Letters Not Available by Law, FOIA (b)(6) Personal Information

Group Title	Mission Records : Board of Directors Records
Group Description	The Board of Directors composition is dictated by section 1413(b) of the BUILD Act of 2018. The Secretary of State serves as Chairperson of the Board. The Administrator of the United States Agency for International Development serves as the Vice Chairperson of the Board. Additional members include the Chief Executive Officer for the International Development Finance Corporation and other officers of the Government of the United States whose duties relate to the programs of DFC.

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The Board of Directors of DFC provides policy direction and general oversight to DFC. At the end of each fiscal year, the Board approves and authorizes for transmission to Congress and to the Office of Management and Budget a complete and detailed report of DFC's operations during the fiscal year as required by legislation from Section 102 of the Government Corporation Control Act. The Board, in consultation with the Director of the Office of Management and Budget, assesses a dividend payment to the Treasury if DFC's insurance portfolio is more than 100 percent reserved. The Board of Directors calls on members of the Development Advisory Council to advise the Board regarding the extent DFC is meeting its development mandate and any suggestions for improvements including opportunities in countries and project development and implementation challenges and opportunities.

The Board also contains an Executive Committee, made up of no less than four members which require unanimous vote to conduct business and has full powers to conduct any business coming before the Board, and an Audit Committee, made up of three Directors other than the CEO of DFC. This Committee assists the Board with fulfilling its financial oversight responsibilities. There is also a Risk Committee, consisting of three Directors other than the CEO. The Risk Committee reports to the Board and assists in fulfilling its oversight responsibilities under Section 1421 (a) of the BUILD Act.

The Development Advisory Council advises the Board of Directors on development objectives of DFC. Members of the Council are appointed by the Board, on the recommendation of the CEO and Chief Development Officer and is composed of not more than nine members broadly representative of nongovernmental organizations, think tanks, advocacy organizations, foundations, and other institutions engaged in international development. Members of the Council report to the Board and advise the Board regarding the extent to which DFC is meeting its development mandate and any suggestions for improvements with respect to meeting that mandate, including opportunities in countries and project development and implementation challenges and opportunities.

DAA-0420-2025-0001-0009

STATUS: Active

ITEM GENERAL INFORMATION

Item Title

Board Briefings

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Status: APPROVED
Date Approved: 04/22/2026

Item Description	These records contain agendas and reports submitted to the Board from DFC staff on such matters as proposed changes to DFC policies relating to insurance and reinsurance, finance, and investment fund projects; requests for Board approval on projects that exceed management's authority; and on similar matters that require Board consideration. They also contain draft minutes of the last Board Meeting for the Board's approval or modification. Arranged chronologically by meeting date.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:500GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	Yes
FOIA Exemption(s)	FOIA (b)(4) Trade Secrets and Commercial or Financial Information, FOIA (b)(5) Inter-agency or Intra-agency Memorandums or Letters Not Available by Law
DAA-0420-2025-0001-0010	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Board of Directors Meeting Minutes/Ballots

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Item Description	Minutes of Full Meeting; Summary of Closed Portion of Board Meeting; Minutes of the Open Portion of the Meeting, and Ballots for board meeting with board member votes. Meeting minutes include but are not limited to reports by management, budget updates, project approvals presented by the Investment Committee, presentations from the Senior Management Committee, and items for administrative approval such as corporate by-laws. Arranged chronologically
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:500GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Date span of the initial transfer	From: 01/01/2019 To: 12/31/2019
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	Yes
FOIA Exemption(s)	FOIA (b)(5) Inter-agency or Intra-agency Memorandums or Letters Not Available by Law
DAA-0420-2025-0001-0011	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Board of Directors Meeting Resolutions

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Item Description	These files consist of resolutions of the Board on matters presented for their consideration and can include, but are not limited to, approved financing for projects, contracts for political risk insurance and reinsurance, tributes to departing board members, and the establishment of committees that report to the Board of Directors. These resolutions give, in a condensed format, the decisions of the Board on matters coming before the Board for decision. Resolutions that have been modified, revoked, or cancelled by subsequent Board actions are so marked on the index of meetings, included in this item, separated annually, with a notation of the nature and the date of the later change. Resolutions become a part of the official file when signed off on by the Board and the Corporate Secretary. Resolutions approved by the Board of Directors are arranged chronologically by date of meeting with an assigned number.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:200GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	Yes

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FOIA Exemption(s)	FOIA (b)(4) Trade Secrets and Commercial or Financial Information, FOIA (b)(5) Inter-agency or Intra-agency Memorandums or Letters Not Available by Law
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Group Title	Financial Transaction Records
Group Description	<p>DFC provides financing and political risk insurance to help businesses gain footholds in emerging and post-conflict markets and address critical development challenges; loans and loan guarantees to overseas business ventures in the form of medium- to long-term financing, and political risk insurance protects investors and contractors against political risk that their assets may face when deployed overseas. DFC’s investments include those focused on climate mitigation as well as adaptation and resilience to help developing countries adapt to severe weather and other impacts they are experiencing due to climate change. DFC also provides financing for small businesses and women entrepreneurs to create jobs in emerging markets. All financial transactions are evaluated to ensure compliance with international environmental standards; international human rights and worker rights regulations; and no adverse impact on the U.S. economy.</p>

In January 2024, DFC realigned to six sector-focused investment teams. Direct equity investments have shifted from the Office of Investment Funds to two sector offices and are now finance project records. DFC continues to work to ensure that its portfolio includes viable investments that advance adaptation, mitigation, and resilience efforts that meet the needs of local communities. DFC also continues to evaluate investments that increase inclusion so that benefits from transactions are realized by women and other underrepresented groups. Both priorities will be incorporated into each sector’s strategy and plans for future growth.

DAA-0420-2025-0001-0012	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Finance Project Records

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Item Description	DFC financing provides medium-to long-term funding through direct loans, loan guarantees, and direct equity investments. Each finance project is divided into five main categories: origination documents, budget documents, portfolio services, monitoring, and legal documents. Feasibility studies for committed loans are added to the project record file. Origination documents include the loan application, financial statements, the business plan, background checks, screening documents, and the commitment letter approval package for the loan. Budget documents include the approved risk rating scorecard, the subsidy model and subsidy term sheet, and subsidy modifications. Portfolio services documents are administration and billing documents and include the debt service schedule and invoices. Monitoring documents involve reporting requirements for the loan duration, project completion documents, and any amendments and waivers. Legal documents include loan documents, a commitment letter, funding documents, and the first disbursement documentation.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year when Project is closed
Retention Period	Destroy 7 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0013	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Insurance Project Records

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Item Description	Case files related to insurance on investments in the event of losses suffered due to restrictions on the conversion and transfer of local-currency earnings and proceeds of divestiture, liquidation and other distributions constituting a return of the investments; expropriation including confiscation, abrogation, repudiation, and/or impairment of contract and other improper host government interference that deprives the investor of its fundamental rights in the investment; arbitral award default and breach of contract for capital markets and denial of recourse; and war, civil disturbance, insurrection, and other acts of politically-motivated violence, including terrorism and sabotage. Each insurance project contains origination documents, monitoring documents, and legal documents. Included are registrations (if any), applications and project documents, contracts, amendments, action memorandum, embassy communications, foreign government approvals, correspondence, and project clearances.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year when a commitment letter or insurance contract expires or is terminated.
Retention Period	Destroy 7 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0014	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Investment Fund Records

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Records Schedule Number: DAA-0420-2025-0001

Status: APPROVED
Date Approved: 04/22/2026

Item Description	Support and investment capital through debt and equity-related investments in new, expanding or privatizing emerging markets. The fund files consist of but are not limited to four main categories which are, Origination, Terms, Investing, and Monitoring. The Origination documents include Gatekeeper Reports, Initial Screening, Screening Committee, Due Diligence, Subsidy, Risk Assessment, Scoring, Congressional Notifications and approvals. Terms documents include Loan Guaranty, Equity Commitments, Amendments, and Commitment Cancellations. The Investing files contain, Portfolio Company Clearance, Disbursements, Equity Distributions, and Interest Rate Reset – FOGA. The Monitoring portion contains, OIF Reporting, Fund Reporting, Risk Rating and Reserve, Annual Meetings, Monitoring Trips, Credit-LP Equity Actions, Distributions and Prepayments, Equity Distributions, Profit Participation, Workouts and Write-Offs, and Fund Close Out.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year after signature of final memorandum closing an investment project
Retention Period	Destroy 7 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0015	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Equity Investment Records

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0420-2025-0001

Status: APPROVED
Date Approved: 04/22/2026

Item Description	DFC can provide direct equity investments into companies or projects in the developing world which will have developmental impact or advance U.S. foreign policy. Equity investments can be highly developmental because of their ability to support early and growth-stage companies that would otherwise not be able to take on debt, especially companies in low and lower-middle income countries. Records include project and company files that contain project cost, fund strategy, and portfolio information. As a financial tool, direct equity provides DFC with greater flexibility to invest in early and growth-stage companies, partner with other financial institutions, and enable investees to scale operations more efficiently to create greater development impact. DFC can make equity investments up to 30% of the total equity in a company or project, subject to a comprehensive review process.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year after signature of final memorandum closing an equity project.
Retention Period	Destroy 7 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0016 STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Canceled, Withdrawn, or Rejected Finance Project, Insurance Project, Investment Funds, and Equity Investment Application Files

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0420-2025-0001

Status: APPROVED
Date Approved: 04/22/2026

Item Description	Arranged alphabetically, by Client's Name. These files include but are not limited to the original registrations and applications together with correspondence and reports for which no formal contract is signed. A file is closed when the project is canceled, withdrawn by the client or it is decided the project is rejected.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year when in which the project is cancelled, withdrawn, or rejected.
Retention Period	Destroy 2 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

Group Title	Program Office Records
Group Description	Records of the Offices of DFC.
DAA-0420-2025-0001-0017	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Risk Sharing & Retention Agreement Files
Item Description	Arranged alphabetically by the name of the company or client, then by country. These files consist of, but are not limited to, contracts, memoranda, correspondence, reports, and other related records concerning DFC's involvement in reinsurance (insurance for insurers or stop-loss insurance), coinsurance, and cooperative insurance arrangements with insurance clients and private insurance companies, designed to spread the risk of large insurance payments.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	

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Status: APPROVED
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Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:60GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	Yes
FOIA Exemption(s)	FOIA (b)(4) Trade Secrets and Commercial or Financial Information, FOIA (b)(5) Inter-agency or Intra-agency Memorandums or Letters Not Available by Law
DAA-0420-2025-0001-0018	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Feasibility Studies
Item Description	Support for the analysis of a potential DFC financial project as well as other special studies for DFC project opportunities. These documents include but are not limited to reports and supporting documentation.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year.

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0420-2025-0001

Status: APPROVED
Date Approved: 04/22/2026

Retention Period	Destroy 7 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0019	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Briefing Reports for Investment Missions
Item Description	These reports are prepared for the information of investment mission participants and, secondarily, for DFC staff involved in the mission. They are designed to acquaint the U.S. participants with the investment climate and other information concerning the country. DFC investment missions usually last one week and there are several missions each year. The reports contain general information on U.S. and DFC involvement in a particular country; on other financial aid programs within that country; press releases on the mission; biographical information on the DFC and U.S. participants; and any specific information about the country that would be pertinent to the success of the mission. Arranged by year and thereunder by region.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year.
Retention Period	Destroy 1 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0020	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Organizational Charts- Permanent

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0420-2025-0001

Status: APPROVED
Date Approved: 04/22/2026

Item Description	Permanent Records: Organizational Charts showing reorganizations and structural changes to DFC requiring Congressional approval.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:100GB
Approximate first year of records covered by this authority	2019
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	No
DAA-0420-2025-0001-0021	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Organizational Charts- Temporary
Item Description	All other organizational charts not described in DAA-0420-2025-0001-0020.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year.
Retention Period	Destroy 3 year(s) after cutoff

National Archives and Records Administration
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Records Schedule Number: DAA-0420-2025-0001

Status: APPROVED
Date Approved: 04/22/2026

ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0022 STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Memorandums of Understanding (MOUs)
Item Description	Records of MOUs established between DFC and other agencies, or between offices within DFC.
Is this item media neutral?	No
Media limitation	Digital only
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year when the agreement is superseded or obsolete.
Retention Period	Destroy 10 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0023 STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Portfolio Performance Evaluations
Item Description	Portfolio performance evaluations are deep dives into select projects with a sectoral, thematic, or country-level focus. Portfolios are public reports that include impact monitoring reflections, lessons learned, project information, findings and recommendations. The learnings gleaned from performance evaluations help inform changes to DFC policies, procedures, project structuring, and/or strategy.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No

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Status: APPROVED
Date Approved: 04/22/2026

SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year when the evaluation is complete.
Retention Period	Destroy 7 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No

Group Title	External Affairs Records
Group Description	The Office of External Affairs (OEA) is DFC's primary communicator to all external audiences, including media, Congress, stakeholders, and the American public. OEA is tasked with raising the profile of the Corporation to the various audiences and to meet DFC's obligations to its committees of jurisdiction in the United States Congress.

DAA-0420-2025-0001-0024	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Press Releases and Media Fact Sheets
Item Description	Press or news releases, prepared statements, or announcements issued for distribution to the news media covering such topics as policy announcements, changes to senior personnel, and new initiatives. Arranged chronologically.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No

SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.

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Status: APPROVED
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Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:100GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	No
DAA-0420-2025-0001-0025 STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Congressional Affairs Records
Item Description	Correspondence with members of Congress concerning DFC's programs as well as statements of DFC's policy in various countries and concerning various industries. Arranged chronologically.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year.
Retention Period	Destroy 10 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0026 STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Senate and House Committee Files

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0420-2025-0001

Status: APPROVED
Date Approved: 04/22/2026

Item Description	Background reference materials used in preparing materials for Congressional committees where DFC members testify.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Cutoff Instructions	Cut off at end of Fiscal year.
Retention Period	Destroy 5 year(s) after cutoff
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	No
GAO Approval Required	No
DAA-0420-2025-0001-0027	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Speeches
Item Description	Public speeches including stump speeches made by Senior Officials of DFC concerning policies and programs. Arranged chronologically.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:200GB

National Archives and Records Administration
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Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	No
DAA-0420-2025-0001-0028	
STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Publications
Item Description	Newsletters, annual reports, brochures, fact sheets, and other publications issued to disseminate information on the agency and its programs. Arranged chronologically and by topic.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:100GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	No
DAA-0420-2025-0001-0029	
STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Press Conference Files

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0420-2025-0001

Status: APPROVED
Date Approved: 04/22/2026

Item Description	Official transcripts or recordings of DFC press conferences.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:100GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	No
DAA-0420-2025-0001-0030	STATUS: Active
ITEM GENERAL INFORMATION	
Item Title	Official Biographies and Photos
Item Description	Biographical sketches and photographs of DFC executives.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year when individual departs the agency.
Are there multiple instructions for this item?	No

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0420-2025-0001

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Transfer Instruction	Transfer to the National Archives 5 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:500GB ; Born Digital - Photographs:6GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	No
DAA-0420-2025-0001-0031	
STATUS: Active	
ITEM GENERAL INFORMATION	
Item Title	Congressional Confirmation Hearing Files
Item Description	Documents used to prepare the confirmation hearings for the Chief Executive Officer, the Deputy Chief Executive Officer, and the four private Board of Director members.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Permanent
Cutoff Instructions	Cut off at end of Fiscal year after individual's departure from the agency.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 15 year(s) after cutoff
ADDITIONAL INFORMATION	
Current Records Format	Textual data:100GB
Approximate first year of records covered by this authority	2019
End year of records covered by this authority	Still being created
Frequency of transfer	1
Are any of the records covered by this item subject to a FOIA exemption?	No

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Records Schedule Number: DAA-0420-2025-0001

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Signatory Information

Action	User	Date
Approve	Edward Forst (Acting Archivist)	04/22/2026



Office of the Chief
Records Officer for the
U.S. Government

This schedule was signed outside of the ERA system using Standard Form 115.

NARA staff updated ERA to reflect this approval, moving the record schedule into an approved status. The approved status allows for generation of a PDF indicating that the schedule has been approved, and allows an agency to use the schedule in ERA to create transfer requests. The approved date in the system and on the PDF version of the records schedule reflects the system actions.