NATIONAL ARCHIVES

Agency Services

Bi-Monthly Records and Information Discussion Group

To Ask Questions

Chat via YouTube

or

Email:
rm.communications@nara.gov

December 10, 2024

Agenda

- NARA Strategic Framework

- Federal Records Centers Program Updates

- Metadata for Classified Records Discussion

National Archives

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2026–2030 Strategic Framework

William "Jay" Bosanko

Deputy Archivist of the United States

STRATEGIC PLAN FRAMEWORK

MISSION
We preserve, protect, and share the historical records of the United States to promote public inquiry and strengthen democratic participation.

VISION
The National Archives serves all Americans as a trusted repository of knowledge that inspires civic engagement and encourages the discovery of our nation's stories.

We Serve

We are our nation's record keepers. We work together to enrich public understanding and ensure that the stories of our nation are accessible. We actively listen to all communities, provide timely and knowledgeable assistance, and create a collaborative environment where everyone can engage meaningfully with the rich historical resources in our care.

Our service ensures current and future generations can connect with and learn from our shared past.

We Inspire

We are leaders in our fields. We use our holdings and expertise to inspire lifelong learning and civic engagement. We encourage creativity and curiosity, for ourselves and others.

We Solve Problems

We are bold. We develop novel approaches and imaginative solutions to improve preservation, access, and understanding of our nation's historical records. We embrace advanced technologies and new business practices to thrive in a digital world.

We Are Trusted

We are nonpartisan. We are an authoritative and objective source for knowledge and information.

We serve all Americans with honesty, fairness, and integrity.

We Are Efficient

We are shrewd stewards of the resources entrusted to us. We collaborate, innovate, and optimize our operations to effectively meet our mission.

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Build our Digital Future

Embrace the primacy of electronic information in all facets of our work and position NARA to lead accordingly. Leverage advanced technologies and reengineer systems, processes, and infrastructure to properly manage, preserve, and share our collections in the digital age.

- Develop infrastructure necessary to support growing electronic records.
- Integrate artificial intelligence, machine learning, and robotic process automation to enhance data management, review, and access to records.
- Prioritize user experience design and enhanced digital experience.
- Advance digital preservation and strategic digitization of analog records.
- Modernize records management practices across the federal government.
- Optimize business practices and workforce skill sets for the digital age.

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Transform Access and Engagement

Enhance and expand digitization, educational programs, exhibits, online resources, partnerships and collaborations to reach new audiences and cultivate public engagement with our records and services. Provide greater opportunities for everyone, everywhere to engage with and learn from American history.

- Increase discoverability, availability, and accessibility of records and services.
- Optimize declassification and information access request processing.
- Expand connection to and utility for teachers and learners of all ages.
- Create meaningful and engaging experiences, in-person and online.
- Foster meaningful community engagement and collaborations.

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Elevate Service

Advance a culture of service to ensure every interaction meets high standards and effectively supports our users' needs.

- Connect with and continually learn from our customers and communities, internally and externally.
- Streamline and improve the researcher, visitor, and customer experience.
- Foster workplace excellence and improve customer satisfaction with consistent, reliable, and reputable service.

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Grow our Capacity

Support our staff and optimize operations. Raise awareness about opportunities and challenges. Explore partnerships and new funding opportunities.

- Attract, train, support and retain a skilled, diverse, and cohesive workforce.
- Align internal efforts to agency goals, reduce operational silos, and create a transparent, performance-focused culture.
- Modernize and optimize core business processes, facilities, operations, and services to meet evolving needs.
- Foster collaborations and strategic alliances to support NARA's mission, including increased engagement with Congress and across federal agencies.

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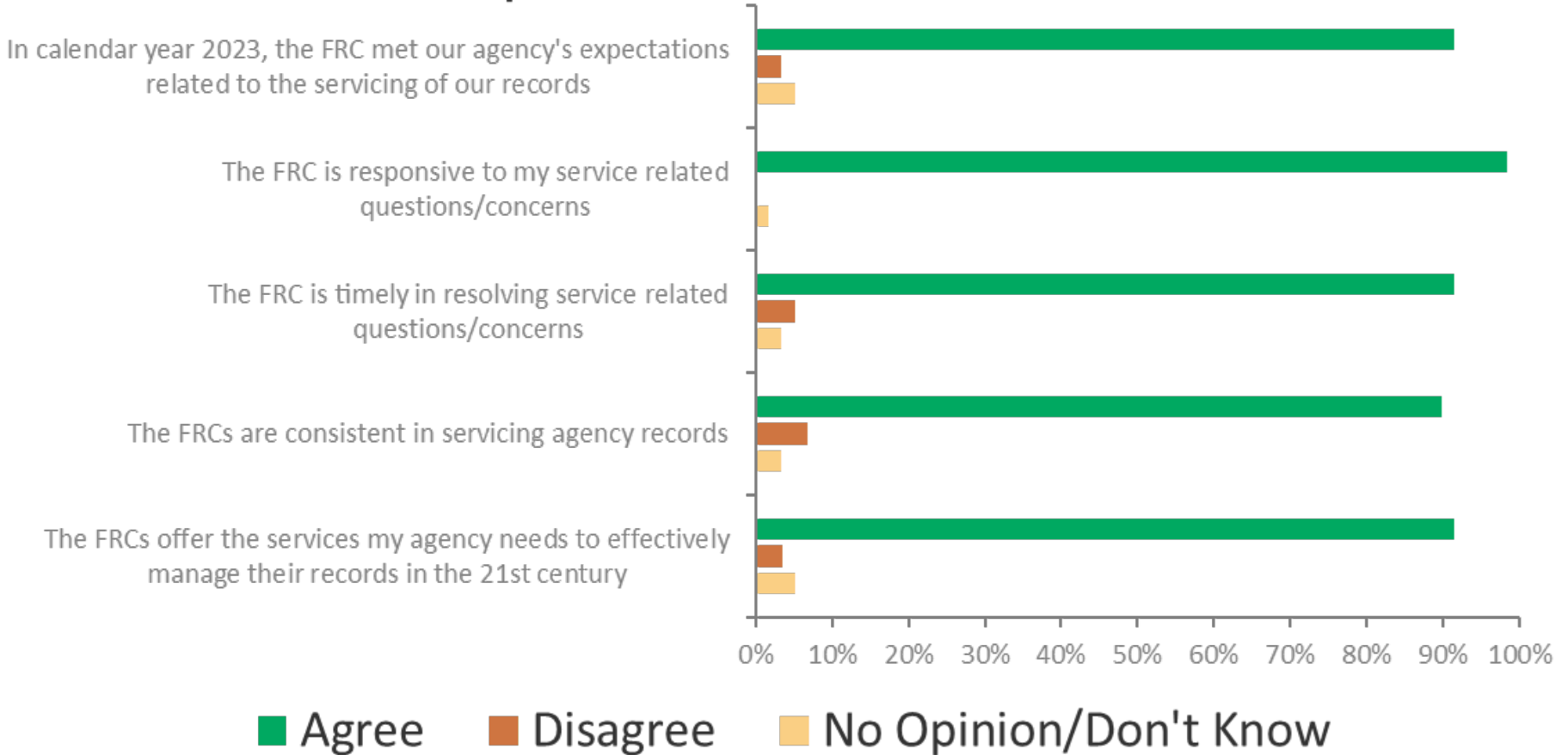# Federal Records Centers Program Annual Customer Survey Results
Conducted April / May 2024

Ron Mitchell

Account Manager

Customer Relationship
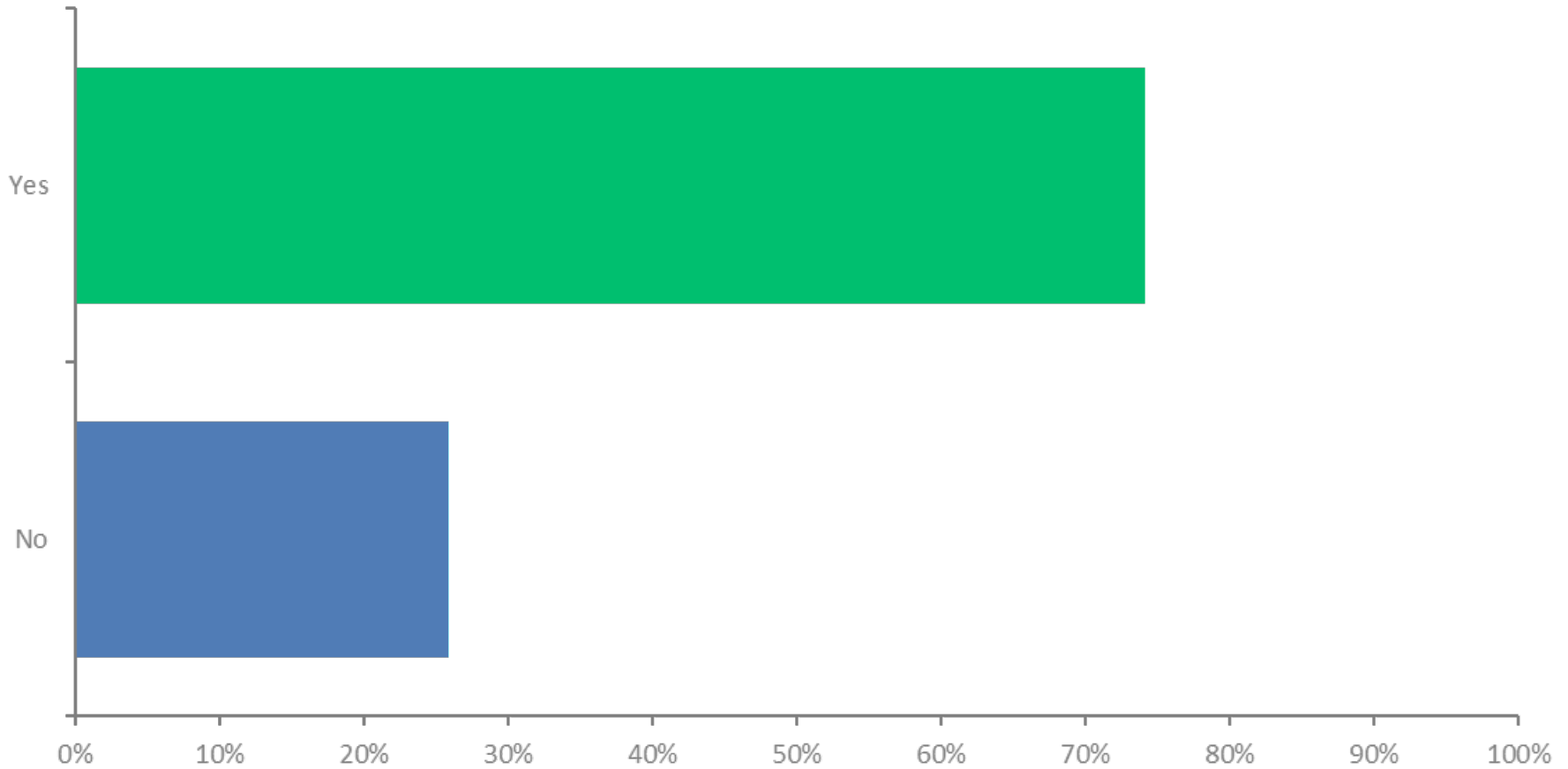
Management Branch

- Overall Services Satisfaction

- Monthly Invoices

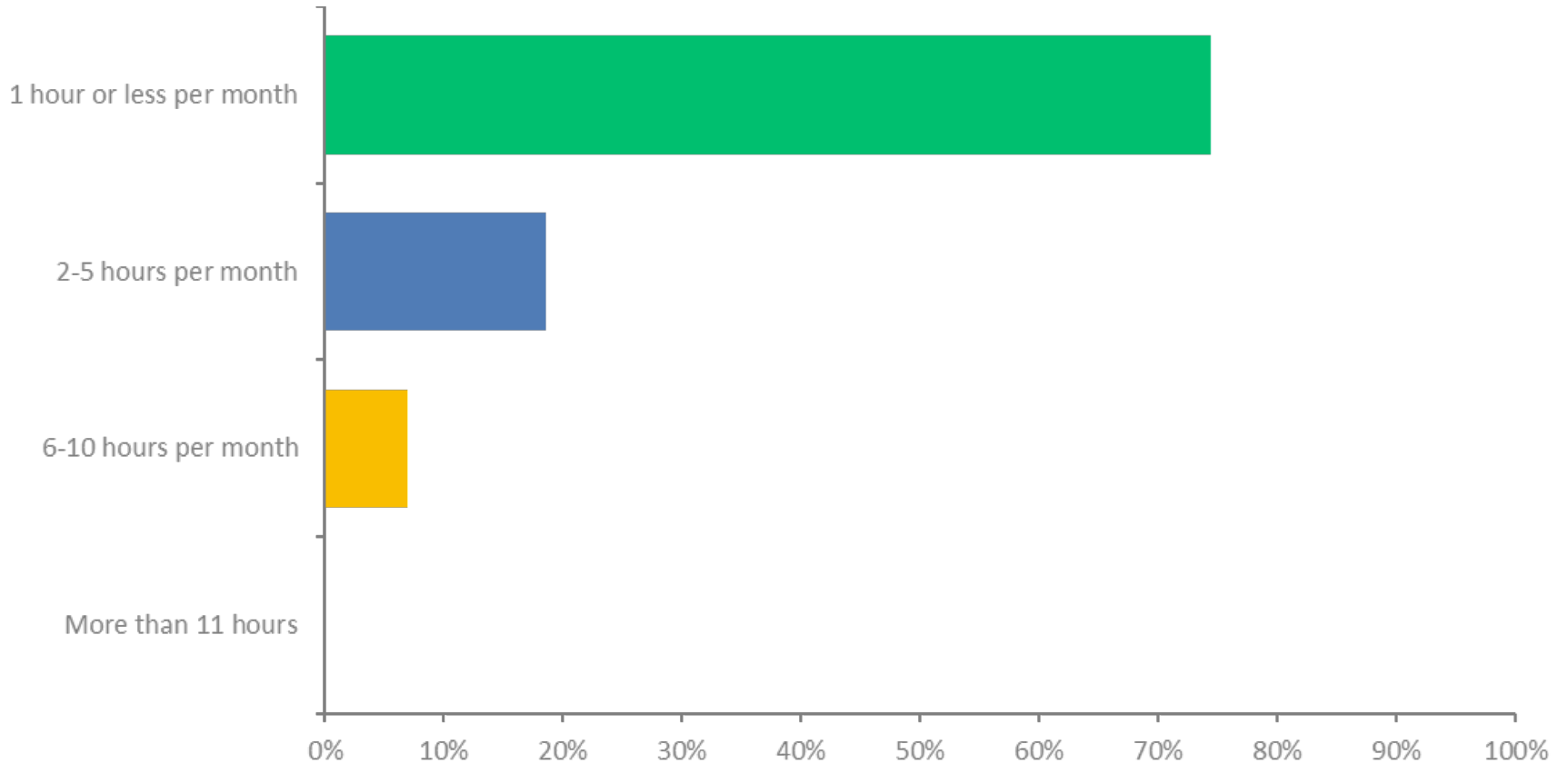- Interagency Agreements

- ARCIS

- Questions

Q1: Please rate the following statements based on your experience with Federal Records Centers services provided.

In calendar year 2023, the FRC met our agency's expectations related to the servicing of our records

The FRC is responsive to my service related questions/concerns

The FRC is timely in resolving service related questions/concerns

The FRCs are consistent in servicing agency records

The FRCs offer the services my agency needs to effectively manage their records in the 21st century

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Agree ■ Disagree ■ No Opinion/Don't Know

Q6: Are you responsible for reviewing the monthly invoice?

Q7: How much time do you spend reviewing your agency's monthly invoice?

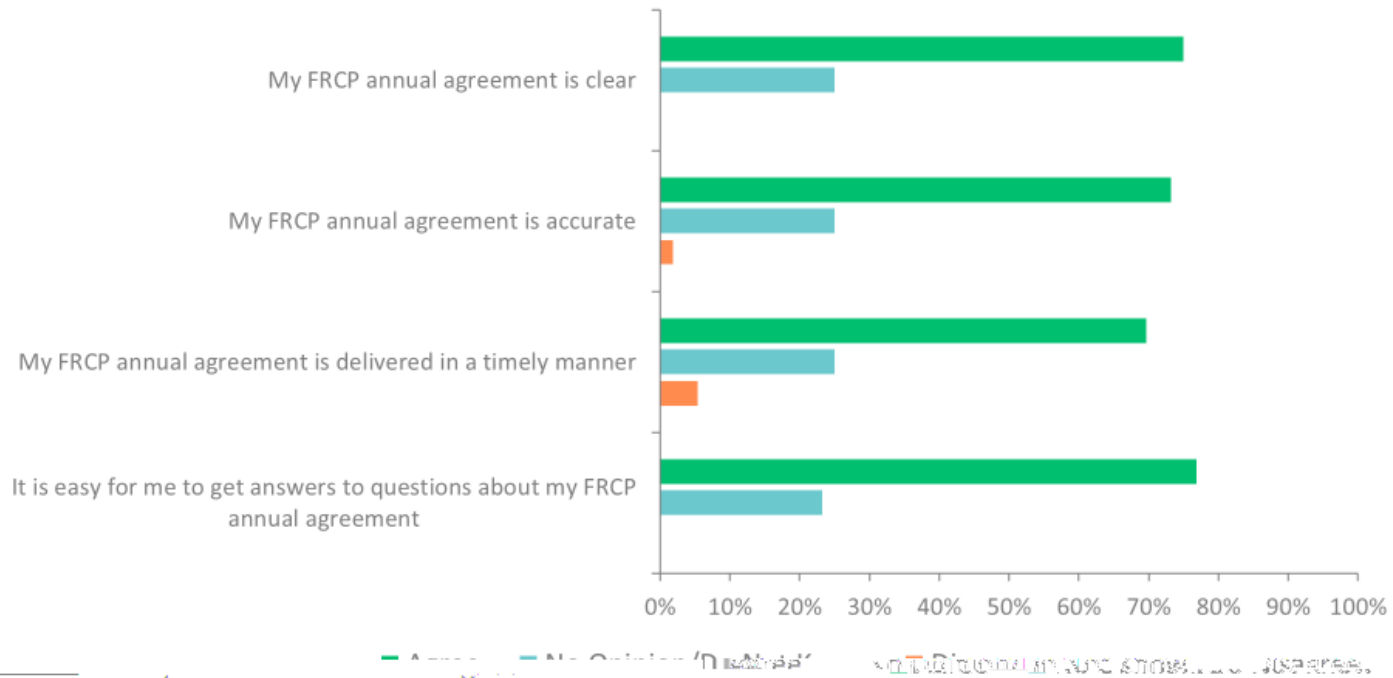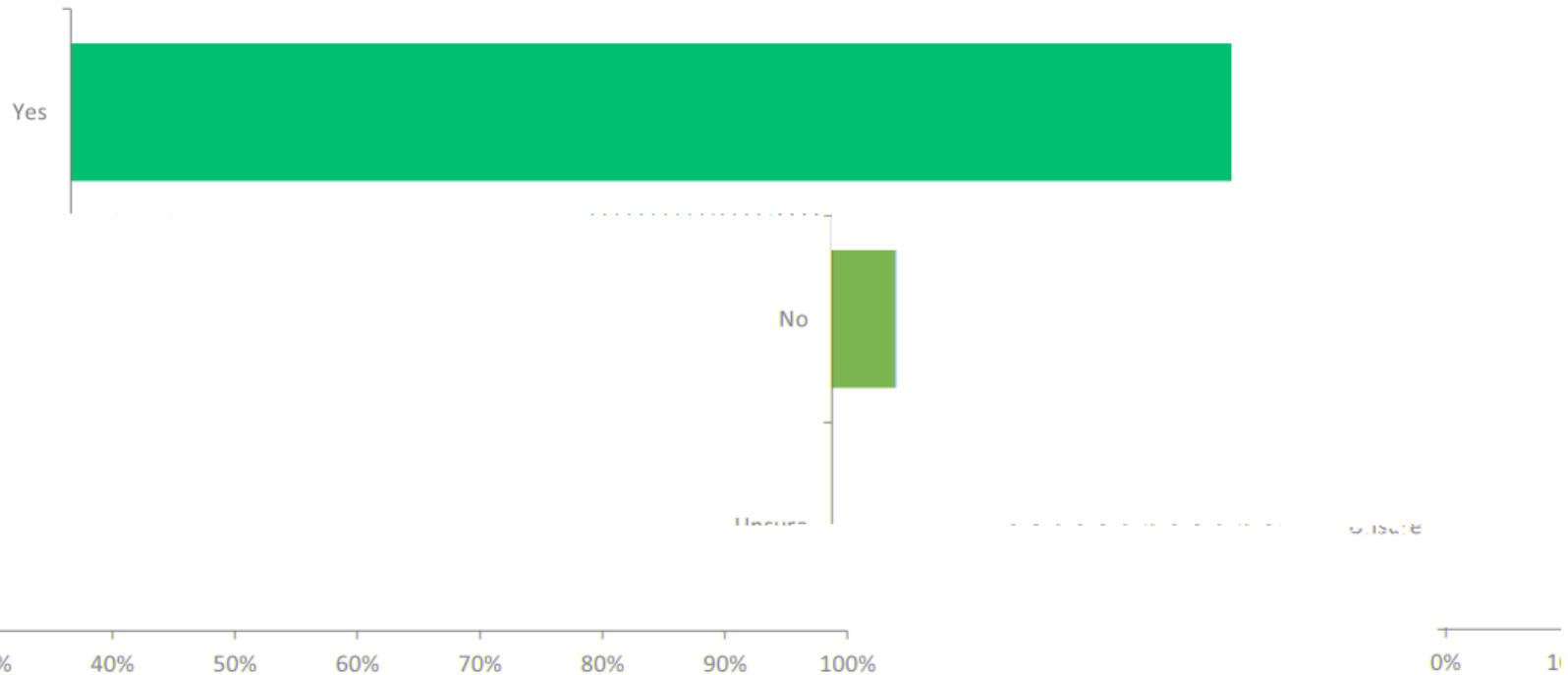**Q9: Please rate the following statements regarding your experience with your FRC monthly invoice:**

My FRC monthly invoice is clear

My FRC monthly invoice is accurate

My FRC monthly invoice is delivered in a timely manner

My FRC monthly invoice provides an adequate level of detail about specific transactions

It is easy for me to get answers to questions about my FRC monthly invoice

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Agree ■ No Opinion/Don't Know ■ Disagree
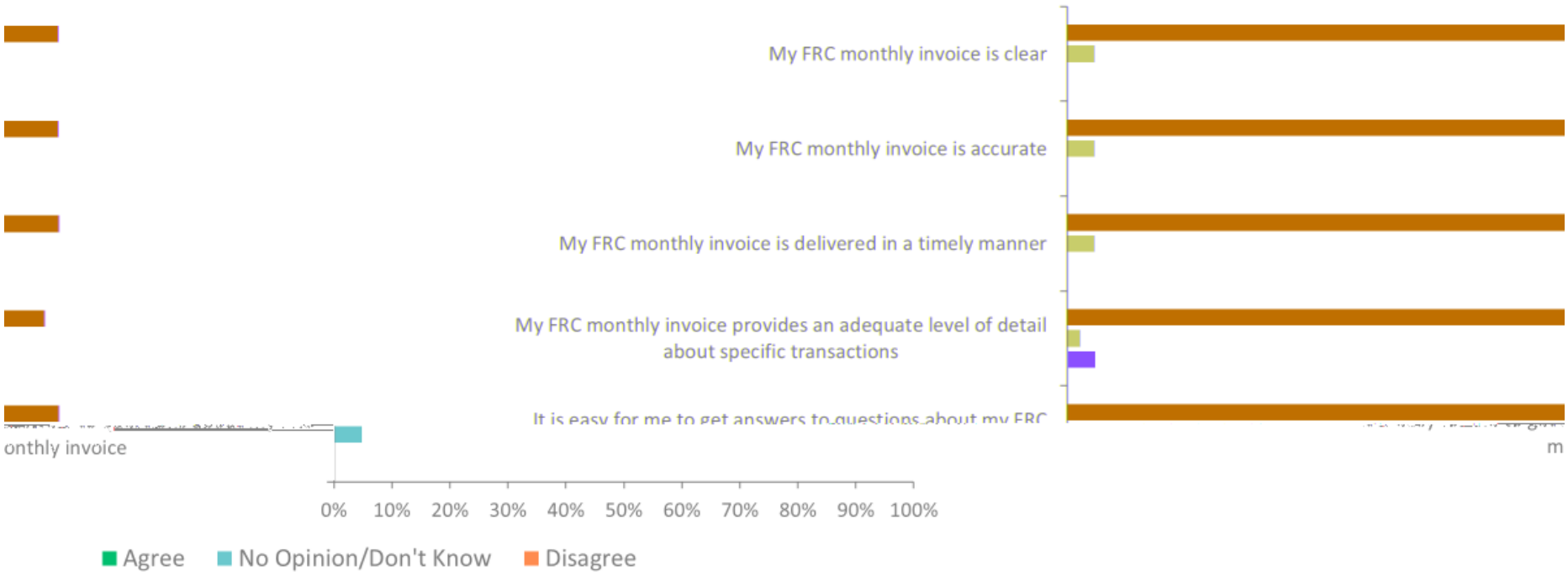
Q11: Please rate the following statements based on your experience with your FRCP annual agreement:

My FRCP annual agreement is clear

My FRCP annual agreement is accurate

My FRCP annual agreement is delivered in a timely manner

It is easy for me to get answers to questions about my FRCP annual agreement

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%

Q13: Does your agency use the ARCIS portal?

Q14: Please rate the following statements related to ARCIS.
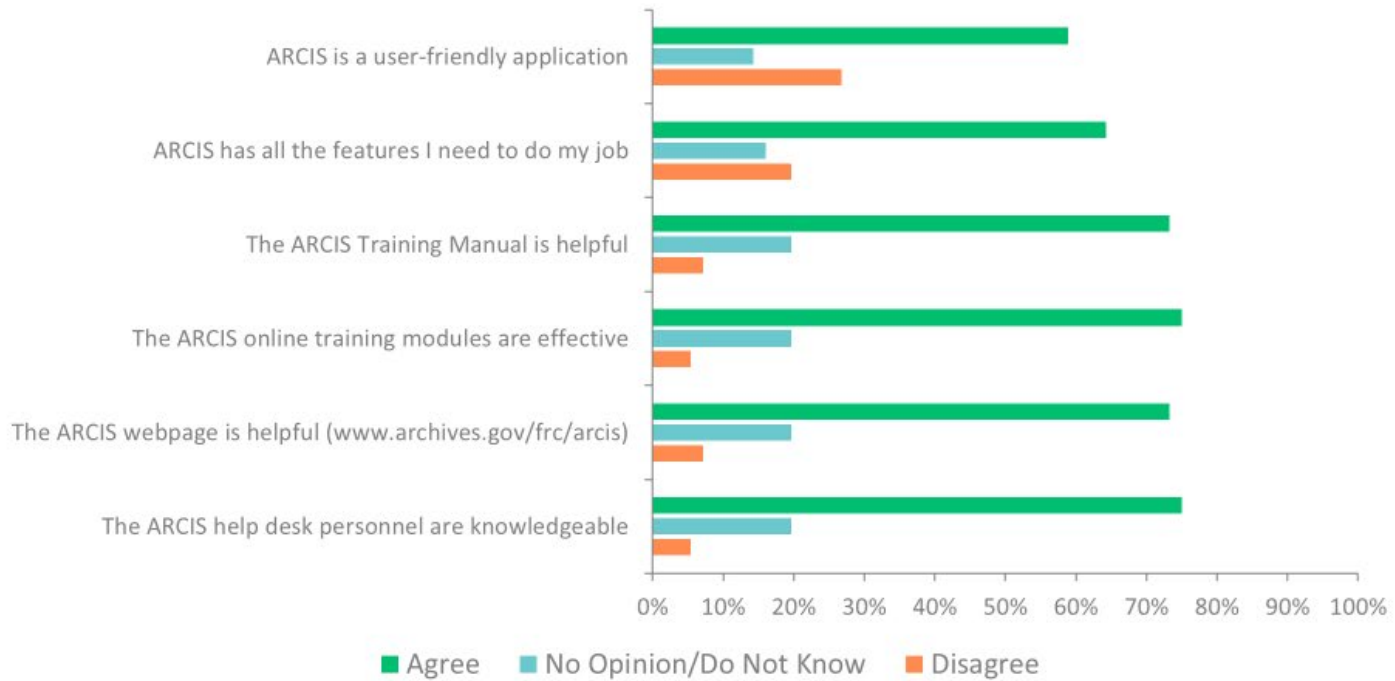
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Financial Updates

Jefferson Lunsford

Chief Financial Analyst

National Archives

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FRCP T&D Updates

Russell Loiselle

Director

FRCP Transfer & Disposition

Division

- COVID-19 Disposal Backlog eliminated - now focusing on Post-Pandemic Disposal Backlog

- FRCs disposed of over 4,236 transfers totaling almost **178,000** cubic feet so far in Q1 FY 25

- Disposition approved over 90 days old is down to less than 315,000 cubic feet (Post Pandemic Disposal)

- Over 18,300 eligible transfers are awaiting agency approval in CPDM and over 103,000 awaiting agency approval via NA-13001s or spreadsheet reports

- The M-23-07 "surge" of transfer requests in ARCIS resulted in over **20,000** requests being received during the 3rd quarter of FY24

- During the 1st quarter, we processed over 2,000 submitted requests and have just over **1,000** left to review

- FRCs have received and shelved almost 105,000 cu ft so far

- AFC continuing to work with agencies on problem "post submitted" transfers

- NARA will continue to accept exception requests

- P2025 Agency Review of First Candidate List completed (over 11,000 accessions proposed)

- P2025 TRs Generated in ERA 2.0 on October 1

  - Agency review ends in December

  - Archives review and approval ends January 15

- P2026 proposed accessions are in the Annual Move Module and FRCs are reviewing and making necessary updates (by January 24)

- The final number of proposed P2026 TRs by December 1st was 1,761 - roughly 12,985 cubic feet.

Questions

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Metadata for Classified Records

Anne Mason

Senior Electronic Records
Policy Analyst

NARA bulletins clarify and explain records management requirements in the Federal Records Act and the Code of Federal Regulations.

NARA bulletins provide mandatory guidance for agencies, who must then determine the most appropriate way to incorporate NARA guidance into their business processes and agency programs.

NARA drafted a bulletin that outlines the metadata requirements for permanent electronic classified records that are needed for NARA to accept the transfer of records and to manage them properly.

Bulletin is in the final stage of review – review by the Archivist for approval and issuance.

Classified Metadata

Some metadata elements may look familiar!

Complements NARA Bulletin 2015-04 – Metadata Guidance for Transfer of Permanent Electronic Records

Some SF-715 form fields, used for analog records transfers have been adapted for electronic records

Classified bulletin expands on "rights" metadata outlined in Bulletin 2015-04.

Rights metadata in classified bulletin outlines access restrictions:

- Rights:SecurityClassification

- Rights:PreviousSecurityClassification

- Rights:ExemptReason

- Authority

Rights metadata required in 2015-04 also covers other "rights."

- Rights:AccessRights covers other access exemptions such as FOIA exemptions or privacy

- Rights:UsageRights details usage and intellectual property restrictions such as copyright.

Special Controls details any additional access restrictions.

- SpecialControls – SCI, RD, NATO

Metadata documents declassification review and can assist in managing records.

Review Action metadata are entirely new metadata elements:

- ReviewAction

- ReviewAgent

- ReviewAuthority

Reviewing agency is documented:

- PrimaryReviewingAgency
- ReviewOffice

Agencies that have equity in the records are noted in the Refer To metadata:

- ReferTo

Date elements document review actions:

- Date:ReviewDate

- Date:DeclassificationDateorEvent

Metadata can be embedded in individual files, in a record keeping system, or both.

CSV is required for transfer of permanent records to NARA.

General Q&A

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NEXT MEETING

Tuesday
February 11, 2025
1:30 pm EST/10:30 am PST

All upcoming BRIDG meeting dates
and previous recordings/slides are at:
archives.gov/records-mgmt/meetings/index.html

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Technical Difficulties
Please Stand by

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archives.gov/records-mgmt/meetings/index.html