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## U.S. Department of State Records Schedule

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### Chapter 36: Bureau of Educational and Cultural Affairs

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#### Assistant Secretary

**A-36-001-01**      **Subject Files**

**Description:** Arranged chronologically by subject. Files containing information relating to the activities of the Assistant Secretary in directing and carrying out the functions, duties and responsibilities of the Bureau of Educational and Cultural Affairs. Includes reports, correspondence, telegrams, memoranda, letters, policy files, project records, reports, and other material related to Educational and Cultural Exchange programs. Break files annually.

**Disposition:** PERMANENT: Transfer to Department Records Service Center (RSC) three years after cutoff. Transfer to WNRC when ten years old. Transfer to the National Archives twenty-five years after cutoff in five-years blocks.

**DispAuthNo:** N1-059-05-01, item 1

**Date Edited:** 8/1/2005

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**A-36-001-02**      **Administrative Records Maintained in any Agency Office**

**Description:** Schedule of Daily Activities.

Records accumulated by individual offices that relate to routine day-to-day administration and management of the office rather than the mission-specific activities for which the office exists. Records include:

- staff locators, unofficial organizational charts, and office seating charts (see Exclusion 1)
- office-level administrative policies and procedures and files related to their development (see Note 1)
- calendars or schedules of daily activities of non-high-level officials (high-level officials are defined in GRS 6.1; this item covers those positions not defined as high-level)
- informal requests and tracking of personnel training, travel, supplies, and equipment, excluding procurement and payment records and forms requesting training (e.g. SF-182)
- internal office activity and workload reports
- studies and analyses of office administrative functions and activities
- non-mission related management reviews and surveys
- minutes of meetings related to administrative activities

Exclusion 1: This item does not apply to recordkeeping copies of organizational charts, functional statements, and related records that document the mission-related organization, staffing, and procedures of the office. Agencies must schedule those records on an agency-specific schedule.

Note 1: This item covers administrative policies and procedures at the office/unit level. GRS 5.7 covers agency-level administrative issuances or directives.

**Disposition:** Temporary. Destroy when business use ceases. (Supersedes GRS 23, item 5b)

**DispAuthNo:** DAA-GRS-2016-0016-0001 (G

**Date Edited:** 9/21/2017

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<b>A-36-001-03</b>	<b>Electronic Mail and Word Processing Copies</b>
<b>Description:</b>	Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate recordkeeping copy of the records covered by other items in the schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.
<b>Disposition:</b>	TEMPORARY: See items a and b for specific dispositions.
<b>DispAuthNo:</b>	N1-059-05-01, item 3 <b>Date Edited:</b> 8/1/2005
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<b>A-36-001-03a</b>	<b>Electronic Mail and Word Processing Copies</b>
<b>Description:</b>	a. Copies that have no further administrative value after the recordkeeping copy are made. Includes copies maintained by individuals in personal files, personal electronic mail directories on hard disk or network drives, and copies on shared network drives used only to produce the recordkeeping copy.
<b>Disposition:</b>	TEMPORARY: Delete within 180 days after the recordkeeping copy has been produced.
<b>DispAuthNo:</b>	N1-059-05-01, item 3a <b>Date Edited:</b> 3/16/2006
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<b>A-36-001-03b</b>	<b>Electronic Mail and Word Processing Copies</b>
<b>Description:</b>	b. Copies used for dissemination, revision, or updating that is maintained in addition to the recordkeeping copy.
<b>Disposition:</b>	TEMPORARY: Delete when dissemination, revision, or updating is completed.
<b>DispAuthNo:</b>	N1-059-05-01, item 3b <b>Date Edited:</b> 3/16/2006
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## U.S. Department of State Records Schedule

### Chapter 36: Bureau of Educational and Cultural Affairs

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#### Office of the Executive Director (ECA-IIP/EX)

**A-36-003-01**      **Accountable Officer File**

**Description:** Original or ribbon copy of accountable officer accounts maintained in the Agency for site audit by GAO auditors. Consisting of statements of transactions, statements of accountability, collection schedules, collection vouchers, disbursement voucher, and all other schedules or vouchers, exclusive of freight records and payroll records.

**Disposition:** TEMPORARY: Destroy 6 years after final payment of cancellation. (Supersedes GRS 6, item 1a).

**DispAuthNo:** GRS 1.1, item 010

**Date Edited:** 6/17/2015

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**A-36-003-02**      **Budget Formulation, Estimates, Justification, and Submission Records, Fiscal Year 2017 and Forward**

**Description:** Includes records such as:

- guidance and briefing materials
- agency or department copy of final submission to OMB and Congress
- narrative statements justifying or defending estimates (sometimes called “Green Books”)
- briefing books and exhibits
- language sheets and schedules
- OMB and Congress pass-back responses and questions; agency appeals, responses, and answers
- testimony at, and other agency records of, Congressional hearings
- final settlement or approved appropriation

Exclusion: This item applies only to agencies that submit their budget requests via OMB. Agencies that do not submit budget requests via OMB are excluded from using this item. Such agencies must submit schedules to NARA to cover their budget submission records.

**Disposition:** Temporary. Destroy 6 years after close of fiscal year, but longer retention is authorized if required for business use. (Supersedes GRS 5, item 2)

**DispAuthNo:** DAA-GRS-2015-006-0001 (G

**Date Edited:** 1/18/2018

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**A-36-003-03**      **Budget Preparation Background Records**

**Description:** Records held at all other offices. Preliminary budget estimates, justifications, cost statements, narrative statements, rough data, and similar materials from internal agency components (individual offices, divisions, programs, etc.) for use in preparing annual, agency-wide budget requests.

**Disposition:** Temporary. Destroy when 2 years old, but longer retention is authorized if required for business use. (Supersedes GRS 5, item 2)

**DispAuthNo:** DAA-GRS-2015-0006-0006 (G

**Date Edited:** 1/18/2018

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## U.S. Department of State Records Schedule

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### *Chapter 36: Bureau of Educational and Cultural Affairs*

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#### **A-36-003-04      Budget Administration Records**

**Description:** Records documenting administration of budget office responsibilities. Includes:

- correspondence relating to routine administration, internal procedures, and other day-to-day matters
- records monitoring expenditures under approved budget allocations
- records of financial controls maintenance
- spreadsheets and databases tracking income, expenditures, and trends
- work planning documentation
- cost structure and accounting code lists
- feeder and statistical reports
- related correspondence

**Disposition:** Temporary. Destroy when 3 years old, but longer retention is authorized if required for business use. (Supersedes GRS 5, item 1)

**DispAuthNo:** DAA-GRS-2015-0006-0007 (G      **Date Edited:** 1/18/2018

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#### **A-36-003-05a      Budget Reports**

**Description:** Full fiscal-year reports. Standard Form 133, Report on Budget Execution and Budgetary Resources, or equivalent. Periodic status reports on agency's proposed rate of expenditure, appropriations, obligations, apportionments and outlays.

**Disposition:** Temporary. Destroy when 5 years old, but longer retention is authorized if required for business use. (Supersedes GRS 5, item 3a)

**DispAuthNo:** DAA-GRS-2015-0006-0003 (G      **Date Edited:** 1/18/2018

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**U.S. Department of State Records Schedule**

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**Chapter 36: Bureau of Educational and Cultural Affairs**

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**A-36-003-06      Budget Execution Records**

**Description:** Records offices create and receive in the course of implementing and tracking an appropriation. Includes:

- allotment advice, revisions, and ceiling limitations
- apportionments and reapportionments
- obligations under each authorized appropriation
- rescissions and deferrals
- operating budgets
- outlay plans
- fund utilization records
- fund reviews
- workforce authorization and distribution
- continuing resolution guidance
- calculations
- impact statements
- related records

Exclusion: Formal budget reports are covered in items 030 and 031.

**Disposition:** Temporary. Destroy 6 years after close of fiscal year, but longer retention is authorized if required for business use. (Supersedes GRS 5, item 4)

**DispAuthNo:** DAA-GRS-2015-0006-0002 (G      **Date Edited:** 1/18/2018

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**A-36-003-07      See Chapter 3 of the DoS Record Disposition Schedule (Common Items) for disposition of General Procurement Files.**

**Description:**

**Disposition:**

**DispAuthNo:** N1-059-05-13, item 7      **Date Edited:** 3/23/2006

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## U.S. Department of State Records Schedule

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### Chapter 36: Bureau of Educational and Cultural Affairs

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**A-36-003-08a**                      **Employee Management Administrative Records**

**Description:**            Records on routine office program support, administration, and human resources operations. Includes:

- reports, including annual reports to the Department of State concerning the number of official passports issued and related matters
- reports from subordinate units regarding statistics and other reporting measures
- general correspondence with internal agency offices and with OPM
- general correspondence with travelers regarding official passport application procedures and documentation requirements
- statistics, including lists of official passport holders

Exclusion: Agency reports received by the Department of State document the Department's mission and must be scheduled by the Department.

**Disposition:**            Temporary. Destroy when 3 years old, but longer retention is authorized if required for business use. (Supersedes GRS 1, item 3)

**DispAuthNo:**            DAA-GRS-2017-0007-0001 (G                      **Date Edited:**            9/5/2017

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**A-36-003-08b**                      **Supervisors' Personnel Files**

**Description:**            Records on positions, authorizations, pending actions, position descriptions, training records, individual development plans, telework agreements, award recommendations, and records on individual employees not duplicated in or not appropriate for the OPF. These records are sometimes called supervisors' working files, unofficial personnel files (UPFs), and employee work folders or "drop" files.

Exclusion 1: Records that become part of a grievance file, an appeal or discrimination complaint file, a performance-based reduction-in-grade or removal action, or an adverse action. These records are covered under GRS 2.3, Employee Relations Records.

Exclusion 2: Employee medical documents, unless part of employee's initial request for reasonable accommodation. Following approval, the agency's reasonable accommodation decision replaces medical documentation and becomes the record. Reasonable accommodation employee case files are covered under GRS 2.3, Employee Relations Records.

**Disposition:**            Temporary. Review annually and destroy superseded documents. Destroy remaining documents 1 year after employee separation or transfer. (Supersedes GRS 1, item 18a and GRS 1, item 18b)

**DispAuthNo:**            DAA-GRS-2017-0007-0012 (G                      **Date Edited:**            9/1/2017

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**A-36-003-09 Grant Program Management Files**

**Description:** Contain copies of grant forms, grantee program reports, justifications, budget, payment records, and correspondence relating to grants program administration. File also includes telegrams, memorandums, financial documents, and amendments pertaining to agreements between the Department, domestic and international organizations, or individuals.

**Disposition:** TEMPORARY: Retire to Records Service Center (RSC) at end of fiscal year in which all financial transactions are completed. Destroy 6 years and 3 months after final payment.

**DispAuthNo:** N1-059-05-13, item 9

**Date Edited:** 3/17/2006

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**A-36-003-10 New Grant Program Administrative Files**

**Description:** This item covers administrative records relating to the solicitation, review, and award process for institutional grants and cooperative agreements administered by ECA. Records include requests for grant proposals, approved solicitation, approved concurrence memorandums, internal approval documentation, and related material.

**Disposition:** TEMPORARY: Retire to Records Service Center (RSC) at end of fiscal year in which all financial transactions are completed. Destroy 6 years and 3 months after final payment.

**DispAuthNo:** N1-059-05-13, item 10

**Date Edited:** 3/17/2006

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**A-36-003-11a Electronic Mail and Word Processing System Copies**

**Description:** Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate recordkeeping copy of the records covered by other items in the schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revisions, or dissemination.

a. Copies that have no further administrative value after the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recordkeeping copy.

**Disposition:** TEMPORARY: Delete within 180 days after the recordkeeping copy has been produced.

**DispAuthNo:** N1-059-05-13, item 11a

**Date Edited:** 3/17/2006

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**A-36-003-11b                      Electronic Mail and Word Processing System Copies**

**Description:** Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate recordkeeping copy of the records covered by other items in the schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revisions, or dissemination.

b. Copies used for updating, revision, or dissemination that are maintained in addition to the recordkeeping copy.

**Disposition:** TEMPORARY: Delete when updating, revision, or dissemination is completed.

**DispAuthNo:** N1-059-05-13, item 11b

**Date Edited:** 3/17/2006

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**A-36-003-12                      Exchanges Statistical Management System**

**Description:** ESMS is an electronic information system that is designed to capture and aggregate statistical data on ECA exchange programs. ESMS data is used to support geographic budget planning and reports for DoS management, the Interagency Working Group (IAWG) on international exchanges and education and training, the Census Bureau, and Congress. For small programs, data is entered manually by ECA program offices. For larger programs (Academics, International Visitors, Cultural and Citizens Exchanges) data is transferred electronically via an annual automated data transfer program. ESMS records include data relating to funds per country; participants per country; employment types; fields of study; sources of funds; and strategic goals by funds and participants. Data spans the period 1996 to present.

**Disposition:** Temporary. Cut off at end of each fiscal year. Destroy when 15 years old or when no longer needed, whichever is later.

**DispAuthNo:** N1-059-09-29, item 1

**Date Edited:** 12/16/2011

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#### Deputy Assistant Secretary for Academic Programs (ECA/A)

**A-36-004-01 Subject Files**

**Description:** Arranged by subject. Reports containing information relating to the activities of the Deputy Assistant Secretary in directing and carrying out the functions and responsibilities for the Academic programs. Includes correspondence, telegrams, memoranda, letters, policy files, reports, and related material.

**Disposition:** PERMANENT: Cut off annually. Transfer to Department Records Service Center (RSC) three years after cutoff for transfer to a records storage facility. Transfer to the National Archives twenty-five years after cutoff in five-year blocks.

**DispAuthNo:** N1-059-05-02, item 1

**Date Edited:** 6/8/2005

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**A-36-004-02 Program Files**

**Description:** Arranged by academic program. Files containing information relating to the activities, functions, duties, and responsibilities of the Executive staff. Includes reports, correspondence, memoranda, telegrams, project records, policy files, and other material related to Academic Exchange Programs.

**Disposition:** PERMANENT: Cut off when grant ends or is renewed. Transfer to RSC three years after cutoff for transfer to a records storage facility. Transfer to the National Archives twenty-five years after cutoff in five-year blocks.

**DispAuthNo:** N1-059-05-02, item 2

**Date Edited:** 6/8/2005

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**A-36-004-03 Schedule of Daily Activities**

**Description:** Calendars, appointment books, schedules, logs, dairies, and other records documenting the daily activities of the Deputy Assistant Secretary and assistants in an official capacity, created and maintained in hard copy or electronic form. Materials determined to be "personal records" are not covered by this item.

**Disposition:** TEMPORARY: Destroy or delete when no longer needed for convenience or reference.

**DispAuthNo:** N1-059-05-02, item 3

**Date Edited:** 6/8/2005

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**A-36-004-04 Electronic Mail and Word Processing Copies**

**Description:** Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate recordkeeping copy of the records covered by other items in the schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.

**Disposition:** TEMPORARY: See items 4a and 4b for specific dispositions.

**DispAuthNo:** N1-059-05-02, item 4

**Date Edited:** 6/8/2005

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**A-36-004-04a                      Electronic Mail and Word Processing Copies**

**Description:** Copies that have no further administrative value after the recordkeeping copy are made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives used only to produce the recordkeeping copy.

**Disposition:** TEMPORARY: Delete within 180 days after the recordkeeping copy has been produced.

**DispAuthNo:** N1-059-05-02, item 4a                      **Date Edited:** 6/8/2005

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**A-36-004-04b                      Electronic Mail and Word Processing Copies**

**Description:** Copies used for dissemination, revision, or updating that is maintained in addition to the recordkeeping copy.

**Disposition:** TEMPORARY: Delete when dissemination, revision, or updating is completed.

**DispAuthNo:** N1-059-05-02, item 4b                      **Date Edited:** 6/8/2005

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## U.S. Department of State Records Schedule

### Chapter 36: Bureau of Educational and Cultural Affairs

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#### Office of Academic Exchange Programs (ECA/A/E)

**A-36-005-01 Subject/Project File**

**Description:** Contain information relating to the activities, functions, duties, and responsibilities of high-level Bureau officials. Includes reports, correspondence, memoranda, telegrams, e-mails, and other material related to the Academic Exchange Programs.

**Disposition:** PERMANENT: Break files annually. Retire to Department Records Service Center (RSC) when three years old for transfer to a records storage facility. Transfer to the National Archives when twenty-five years old in five-year blocks.

**DispAuthNo:** N1-059-05-03, item 1

**Date Edited:** 6/8/2005

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**A-36-005-02 Program Files**

**Description:** Arranged by country. Contain minutes of staff meetings, reports, memoranda, and correspondence relating to the development of policy and to binational educational exchange commissions.

**Disposition:** PERMANENT: Break file annually. Retire to Department Records Service Center (RSC) when three years old for transfer to a records storage facility. Transfer to the National Archives when twenty-five years old in five-year blocks.

**DispAuthNo:** N1-059-05-03, item 2

**Date Edited:** 12/16/2011

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**A-36-005-03 General Country File**

**Description:** Arranged by country. Correspondence, reports, memorandums, evaluations, agreements, proposals, telegrams, and other material relating to overall policymaking and coordination relating to the coordination and carrying out of academic programs carried out by various branches.

**Disposition:** PERMANENT: Break files annually. Retire to Department Records Service Center (RSC) when three years old for transfer to a records storage facility. Transfer to the National Archives when twenty-five years old in five-year blocks.

**DispAuthNo:** N1-059-05-03, item 3

**Date Edited:** 6/8/2005

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**A-36-005-04 American and Foreign Grantee Files**

**Description:** Contain individual grantee program or project files and team programs involving more than one grantee on all categories of grantees. Includes grantees application, biographic data sheet, security clearance, grant award, reports of study or training, evaluation data, and related correspondence.

**Disposition:** TEMPORARY: Cut off on termination of grant. Retire to RSC one year after termination of grant. Destroy five years after termination of grant.

**DispAuthNo:** N1-059-05-03, item 4

**Date Edited:** 6/8/2005

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#### A-36-005-05 Grant Administrative Files

**Description:** Contain grantee program reports, budgets, and correspondence relating to grant program administration. Break file annually.

**Disposition:** TEMPORARY: Destroy 3 years after final action is taken on the file. (Supersedes GRS 3, item 14).

**DispAuthNo:** GRS 1.2, item 010 **Date Edited:** 6/18/2015

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#### A-36-005-06 Electronic Mail and Word Processing Copies

**Description:** Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate recordkeeping copy of the records covered by other items in the schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.

**Disposition:** TEMPORARY: See items 06a and 06b for specific dispositions.

**DispAuthNo:** N1-059-05-03, item 6 **Date Edited:** 6/9/2005

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#### A-36-005-06a Electronic Mail and Word Processing Copies

**Description:** Copies that have no further administrative value after the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives used to only to produce the recordkeeping copy.

**Disposition:** TEMPORARY: Delete within 180 days after the recordkeeping copy has been produced.

**DispAuthNo:** N1-059-05-03, item 6a **Date Edited:** 6/9/2005

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#### A-36-005-06b Electronic Mail and Word Processing Copies

**Description:** Copies used for dissemination, revision, or updating that are maintained in addition to the recordkeeping copy.

**Disposition:** TEMPORARY: Delete when dissemination, revision, or updating is complete.

**DispAuthNo:** N1-059-05-03, item 6b **Date Edited:** 6/9/2005

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**A-36-005-07 Academic Exchange Information System (AEIS2)**

**Description:** AEIS2 is an electronic information system designed to track, monitor, and report on ECA-sponsored academic exchange grant activities and grantees. It contains information on individual grants and grantees. Participant and funding data includes grantee application information, participant biographic, and host information. Data spans the period 2003 to the present.

**Disposition:** N/A

**DispAuthNo:** N/A

**Date Edited:** 8/5/2010

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**A-36-005-07a Academic Exchange Information System (AEIS2)**

**Description:** a. Master File

Content includes detailed information on (1) applicant (name, marital status, citizenship and birth countries, number of accompanying dependents, gender, date of birth, ethnicity, race, naturalization date, title, occupation, address, email, phone, and SEVIS ID); (2) application (grantee institution, grant category, grant country, grant start and end dates, co-op agency); (3) application waiver request (waiver basis, case number); and (4) grant (institution, amount, start and end dates, extension).

**Disposition:** Temporary. Cut off at end of fiscal year when grant terminates. Destroy/delete 25 years after cut off or when no longer needed, whichever is later.

**DispAuthNo:** N1-059-09-31, item 1a

**Date Edited:** 8/5/2010

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**A-36-005-07b Intermediary Records**

**Description:** Academic Exchange Information System (AEIS2) electronic records entered into the system during an update process, and not required for audit and legal purposes.

**Disposition:** Temporary. Destroy upon verification of successful creation of the final document or file, or when no longer needed for business use, whichever is later. (Supersedes GRS 4.3 item 010; GRS 4.3, item 011; GRS 4.3, item 012; GRS 4.3, item 020; GRS 4.3, item 030; and GRS 4.3, item 031)

**DispAuthNo:** DAA-GRS-2017-0003-0002 (G

**Date Edited:** 9/26/2017

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**A-36-005-07c Academic Exchange Information System (AEIS2)**

**Description:** c. Outputs

Ad hoc and recurring reports.

**Disposition:** Destroy when no longer needed.

**DispAuthNo:** N1-059-09-31, item 1c

**Date Edited:** 8/5/2010

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**A-36-005-07d Academic Exchange Information System (AEIS2)****Description:** d. Documentation

Includes Project Plan, Project Schedule, System Requirements Document, and Technical Design Document.

**Disposition:** Temporary. Destroy 5 years after the project/activity/transaction is completed or superseded, or the associated system is terminated, or the associated data is migrated to a successor system. (Supersedes GRS 20, item 11a[1]).**DispAuthNo:** GRS 3.1, item 051**Date Edited:** 6/17/2015

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**A-36-005-07e Academic Exchange Information System (AEIS2)****Description:** e. Backups

Production database backups - daily incremental and weekly full.

**Disposition:** Temporary. Destroy immediately after the identical records have been deleted or replaced by a subsequent backup file. (Supersedes GRS 20, item 8b).**DispAuthNo:** GRS 3.2, item 051**Date Edited:** 6/17/2015

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**Office of English Language Programs (ECA/A/L)****A-36-006-01a English Teaching Forum (periodical)**

**Description:** Quarterly journal for teachers of English as a second or foreign language. Begun in 1962; name changed to Forum in 1963. Available electronically beginning in 1993. A complete run in hard copy is maintained in the office.

a. Record set.

**Disposition:** PERMANENT. Transfer one set of all available issues to the National Archives upon approval of this schedule. Transfer future issues in 5-year blocks or upon accumulation of one cubic foot.

**DispAuthNo:** DAA-0059-2011-0015-0004      **Date Edited:** 1/15/2013

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**A-36-006-01b English Teaching Forum (periodical)**

**Description:** b. All other copies.

**Disposition:** TEMPORARY. Destroy or delete when business purposes have been served.

**DispAuthNo:** DAA-0059-2011-0015-0005      **Date Edited:** 1/15/2013

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**A-36-006-02 E-Journals**

**Description:** Online-only compilations of pedagogical materials, providing background information, lesson planning, activities, references and resources. Materials are grouped under two broad categories: Language and Civil Society and Language and Life Sciences.

**Disposition:** TEMPORARY. Delete when superseded or no longer needed for business purposes.

**DispAuthNo:** DAA-0059-2011-0015-0006      **Date Edited:** 1/15/2013

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**A-36-006-03a Curriculum Materials**

**Description:** Literary and other compilations for classroom use, edited for fluency level; background and pedagogical materials for instructors' use; posters and audiovisual materials. Production ranges from titles produced in-house to those produced entirely under contract. Sources are both public domain and copyright.

a. Hard-copy and online materials.

**Disposition:** TEMPORARY. Destroy or delete when superseded or business purposes have been served.

**DispAuthNo:** DAA-0059-2011-0015-0007      **Date Edited:** 1/15/2013

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<b>A-36-006-03b</b>	<b>Curriculum Materials</b>
<b>Description:</b>	b. Audio-visual materials.
<b>Disposition:</b>	TEMPORARY. Destroy or delete when superseded or business purposes have been served.
<b>DispAuthNo:</b>	DAA-0059-2011-0015-0008
<b>Date Edited:</b>	1/15/2013
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<b>A-36-006-04a</b>	<b>Production and Distribution Files</b>
<b>Description:</b>	a. Printing and shipping orders, distribution documents, orders from posts, supply requisitions, galleys and portions of drafts.
<b>Disposition:</b>	TEMPORARY. Destroy 1 year after completion of job, or when business purposes have been served, whichever is longer.
<b>DispAuthNo:</b>	DAA-0059-2011-0015-0009
<b>Date Edited:</b>	1/15/2013
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<b>A-36-006-04b</b>	<b>Production and Distribution Files</b>
<b>Description:</b>	b. Planning files.
<b>Disposition:</b>	TEMPORARY. Destroy when 3 years old, or when business purposes have been served, whichever is longer.
<b>DispAuthNo:</b>	DAA-0059-2011-0015-0010
<b>Date Edited:</b>	1/15/2013
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<b>A-36-006-04c</b>	<b>Production and Distribution Files</b>
<b>Description:</b>	c. Permission and license agreements.
<b>Disposition:</b>	TEMPORARY. Break files annually by fiscal year. Retain in office until agreement has expired. Destroy one year after expiration of agreement, or when business purposes have been served, whichever is longer.
<b>DispAuthNo:</b>	DAA-0059-2011-0015-0011
<b>Date Edited:</b>	1/15/2013
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<b>A-36-006-05a</b>	<b>Contract files</b>
<b>Description:</b>	ECA/A/L/M has contractual arrangements with selected universities (currently UMBC, U. of Oregon and HI Pacific U.) to produce a number of the pedagogical titles, series and videos.  a. Files not duplicated in the Grants section of the Office of the Executive Director.
<b>Disposition:</b>	TEMPORARY. Destroy 6 years after final payment or cancellation. (Supersedes GRS 3, item 3a[1][a]).
<b>DispAuthNo:</b>	GRS 1.1, item 010
	<b>Date Edited:</b> 6/18/2015
<b>A-36-006-05b</b>	<b>Contract files</b>
<b>Description:</b>	b. All others.
<b>Disposition:</b>	TEMPORARY. Destroy 6 years after final payment or cancellation. (Supersedes GRS 3, item 3a[1][b]).
<b>DispAuthNo:</b>	GRS 1.1, item 010
	<b>Date Edited:</b> 6/18/2015
<b>A-36-006-06</b>	<b>Field Research</b>
<b>Description:</b>	Electronic and hard-copy files maintained for reference and development.
<b>Disposition:</b>	TEMPORARY. Destroy/delete when business purposes have been served.
<b>DispAuthNo:</b>	DAA-0059-2011-0015-0012
	<b>Date Edited:</b> 1/15/2013
<b>A-36-006-07a</b>	<b>Social Media</b>
<b>Description:</b>	ECA/A/L established an online site ('ning'), "Shaping the Way We Teach English," which is also the title of a hardcopy/video series of pedagogical materials. Contents include interactive webinar series with related materials such as polls and quizzes; comments and responses from other participants and ECA staff; material posted independently by participants; and subsequent discussion threads.  a. Webinars.
<b>Disposition:</b>	TEMPORARY. Cut off annually and destroy/delete after 3 years or when no longer needed, whichever is later.
<b>DispAuthNo:</b>	DAA-0059-2011-0015-0013
	<b>Date Edited:</b> 1/15/2013

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<b>A-36-006-07b</b>	<b>Social Media</b>
<b>Description:</b>	b. Social Media Management and Operations Records.  Documents created or received in the development, design, implementation, operations and maintenance of the site.
<b>Disposition:</b>	TEMPORARY. Destroy/delete upon authorized deletion of the related social media content or when business purposes have been served.
<b>DispAuthNo:</b>	DAA-0059-2011-0015-0014
	<b>Date Edited:</b> 1/15/2013
<b>A-36-006-08a</b>	<b>Grant Program Administrative Files</b>
<b>Description:</b>	Records relating to the solicitation, review and award process for cooperative agreements administered by ECA. Records include program announcements; RFPs and proposals; MOAs/MOUs; scopes of work; grant and contract agreements; approved solicitations; approved concurrence memorandums; internal approval documentation; periodic reports; forms (DS-1909, Federal Assistance Award, SF-1034, Public Voucher); files on budget, nominations, course descriptions and other topics; and cables and correspondence with Posts, contracting institutions and awardees (individuals and/or institutions, depending on the program) and related material.  a. Files not duplicated in the Grants section of the Office of the Executive Director, and/or Post.
<b>Disposition:</b>	TEMPORARY. Destroy 10 years after final action is taken on file. (Supersedes GRS 3, item 3a[1][a]),
<b>DispAuthNo:</b>	GRS 1.2, item 020
	<b>Date Edited:</b> 6/18/2015
<b>A-36-006-08b</b>	<b>Grant Program Administrative Files</b>
<b>Description:</b>	b. Office copies.
<b>Disposition:</b>	TEMPORARY. Destroy when business use ceases.
<b>DispAuthNo:</b>	GRS 1.2, item 022
	<b>Date Edited:</b> 6/18/2015

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<b>A-36-006-08c</b>	<b>Grant Program Administrative Files</b>
<b>Description:</b>	c. Grant Administrative Files.  Correspondence and/or subject files relating to routine operations and daily activities in administration of the grant program.
<b>Disposition:</b>	TEMPORARY. Destroy 3 years after final action is taken on the file. (Supersedes GRS 3, item 14).
<b>DispAuthNo:</b>	GRS 1.2, item 010
	<b>Date Edited:</b> 6/18/2015
<b>A-36-006-09a</b>	<b>American and Foreign Grantee Files</b>
<b>Description:</b>	Contain individual grantee program or project files and team programs involving more than one grantee on all categories of grantees. Records include grantees' application, biographic data sheet, security clearance, grant award, reports of study or training, evaluation data, and related correspondence.  a. Files not duplicated elsewhere in ECA or at Post.
<b>Disposition:</b>	TEMPORARY. Destroy/delete 10 years after termination of grant.
<b>DispAuthNo:</b>	DAA-0059-2011-0015-0015
	<b>Date Edited:</b> 1/15/2013
<b>A-36-006-09b</b>	<b>American and Foreign Grantee Files</b>
<b>Description:</b>	b. Office copies.
<b>Disposition:</b>	TEMPORARY. Destroy/delete 3 years after termination of grant.
<b>DispAuthNo:</b>	DAA-0059-2011-0015-0016
	<b>Date Edited:</b> 1/15/2013
<b>A-36-006-09c</b>	<b>American and Foreign Grantee Files</b>
<b>Description:</b>	c. Administrative Files.  Correspondence and/or subject files relating to routine operations and daily activities in administration of the grant program.
<b>Disposition:</b>	Temporary. Destroy 3 years after final action is taken on the file, but longer retention is authorized if required for business use. (Supersedes GRS 3, item 14)
<b>DispAuthNo:</b>	GRS 1.2, Item 010
	<b>Date Edited:</b> 3/9/2017

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**A-36-006-10      Program History File**

**Description:** Reports and other background material maintained for context, assistance to program participants, and ease of reference.

**Disposition:** TEMPORARY. Destroy/delete when superseded, obsolete or no longer needed for business purposes.

**DispAuthNo:** DAA-0059-2011-0015-0017

**Date Edited:** 1/15/2013

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**Office of Global Educational Programs (ECA/A/S)****A-36-007-01 Grant Files**

**Description:** Office copies of records created and/or acquired in the course of developing, implementing and monitoring educational exchange programs. Records are largely electronic, including e-mail, word processing and pdf documents, and spreadsheets. Document types include copies of budgets, press releases, publicity material, applications, applicant information, finalist and selectee lists, material provided to/from selection committees, and travel information. Official grant files are located in the ECA Executive Office.

**Disposition:** Temporary. Cut off at end of fiscal year. Destroy/delete 3 years after cutoff.

**DispAuthNo:** DAA-0059-2012-0003-0001 **Date Edited:** 9/3/2013

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**A-36-007-02 Reference and Background Files**

**Description:** Correspondence, memoranda, research files and other material needed for development of future programs, responding to official inquiries, and other program requirements.

**Disposition:** Temporary. Destroy/delete when no longer needed for business use.

**DispAuthNo:** DAA-0059-2012-0003-0002 **Date Edited:** 9/3/2013

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**A-36-007-03 EducationUSA Website**

**Description:** Online presence supporting approximately 400 Educational Advising Centers (EACs) at embassies, consulates, and non-USG host institutions. EACs provide information about educational opportunities in the U.S., varying degrees of service (reference material, computer access, events, briefings, etc.) and guidance for foreign nationals on qualifications and the application process for study in the U.S. Portions of the website are aimed at U.S. students interested in international study, and at American colleges and universities interested in hosting international students.

**Disposition:** N/A

**DispAuthNo:** N/A **Date Edited:** 9/3/2013

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**A-36-007-03a EducationUSA Website**

**Description:** Web Content

Program descriptions, FAQs, location and resources of the EACs, listing of events and other background material.

**Disposition:** Temporary. Delete when information is updated or superseded.

**DispAuthNo:** DAA-0059-2012-0003-0003 **Date Edited:** 9/3/2013

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**A-36-007-03b**      **EducationUSA Website****Description:**      Management and Operations Records

Contains records documenting web site operations and maintenance, such as web site design documents, management policies and procedures, software-related records, and access logs, site posting logs and search result statistics.

**Disposition:**      Temporary. Destroy 5 years after the project/activity/transaction is completed or superseded, or the associated system is terminated, or the associated data is migrated to a successor system. (Supersedes GRS 20, item 11a[1]).**DispAuthNo:**      GRS 3.1, item 051**Date Edited:**      6/17/2015

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**A-36-007-04**      **Annual Statistical Publication (currently Global Guide)****Description:**      Annual compilation produced since 2010, which includes a summary of program activities and statistics related to program use.**Disposition:**      Permanent. Transfer paper records to the National Archives in 5 year blocks when the most recent records are 25 years old. Transfer electronic records to the National Archives when 5 years old.**DispAuthNo:**      DAA-0059-2012-0003-0004**Date Edited:**      9/3/2013

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**A-36-007-05**      **Informational Publications****Description:**      Publications consisting of compilations of information related to study in the United States. Current examples include "If You Want to Study in the United States," and "5 Steps to Study Abroad."**Disposition:**      Temporary. Destroy when superseded or obsolete.**DispAuthNo:**      DAA-0059-2012-0003-0005**Date Edited:**      9/3/2013

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#### Private Sector Exchange (ECA/EC)

**A-36-010-01 Participating Organization Files - Academic and Scientific Organizations**

**Description:** Academic Participants Files - files contain agreements with Academic and Scientific Research organizations, follow up documents, audit records, annual reports, and reports of findings. These documents provide information on the financial and accreditation status of the organizations.

**Disposition:** TEMPORARY: Destroy three years after organization leaves the Exchange program.

**DispAuthNo:** N1-059-06-02, item 1 **Date Edited:** 7/6/2006

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**A-36-010-02 Participating Organization Files -Private Sector Organizations**

**Description:** Private Sector Participants Files. Files contain agreements with Private Sector organizations, follow-up documents, audit records, annual reports, and reports of findings. They also contain incorporation and financial information.

**Disposition:** TEMPORARY: Destroy three years after organization leaves the Exchange program.

**DispAuthNo:** N1-059-06-02, item 2 **Date Edited:** 6/29/2006

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**A-36-010-03 Denied Organization Files**

**Description:** Files maintained on organizations that have been denied participation in program. Includes application and documents produced to identify denial.

**Disposition:** TEMPORARY: Destroy three years after denial of participation.

**DispAuthNo:** N1-059-06-02, item 3 **Date Edited:** 6/29/2006

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**A-36-010-04 Policy Files**

**Description:** Policy file contains documents that provide policy guidance for the program. Records include telegrams, program rules, Federal Register notices, background information, policy directives, correspondence, memorandums, and related regulatory and policy records.

**Disposition:** TEMPORARY: Destroy five years after policy change.

**DispAuthNo:** N1-059-06-02, item 4 **Date Edited:** 6/29/2006

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#### A-36-010-05 Chronological Files

**Description:** Extra copies of communications, correspondence, and other documents arranged in order of occurrence either alphabetically or by post, division, or other method, and used as a general reading or reference file.

**Disposition:** TEMPORARY: Destroy when purpose has been served, usually one year (Supersedes NARA Job No. N1-306-89-9, item 12)

**DispAuthNo:** N1-059-06-02, item 5 **Date Edited:** 6/29/2006

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#### A-36-010-06 Electronic Mail and Word Processing System Copies

**Description:** Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate recordkeeping copy of the records covered by other items in the schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.

**Disposition:** TEMPORARY: See items 6a and 6b for specific disposition

**DispAuthNo:** N1-059-06-02, item 6 **Date Edited:** 7/6/2006

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#### A-36-010-06a Electronic Mail and Word Processing System Copies

**Description:** a. Copies that have no further administrative value after the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recordkeeping copy.

**Disposition:** TEMPORARY: Delete within 180 days after the recordkeeping copy has been produced.

**DispAuthNo:** N1-059-06-02, item 6a **Date Edited:** 6/29/2006

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#### A-36-010-06b Electronic Mail and Word Processing System Copies

**Description:** b. Copies used for updating, revision, or dissemination that are maintained in addition to the recordkeeping copy.

**Disposition:** TEMPORARY: Delete when updating, revision, or dissemination is completed.

**DispAuthNo:** N1-059-06-02, item 6b **Date Edited:** 6/29/2006

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**A-36-010-07 Exchange Visitor Information System (EVIS), 1986-2003**

**Description:** EVIS contains participant and program data on 1,200 completed Academic, Government, and Private Sector exchange visitor programs and over 2 million exchange visits that required J-1 visas for their participants. Data spans the period 1986 through 2003. These data are used to respond to legal, Congressional and program data inquiries for J-1 Visa Program activity for the period 1986 through 2003. This is a static system with no updates to the data. Beginning in 2004, data collection responsibility for this activity was transferred to the Department of Homeland Security (Student and Exchange Visitor Information System).

**Disposition:** N/A

**DispAuthNo:** N/A

**Date Edited:** 9/7/2010

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**A-36-010-07a Exchange Visitor Information System (EVIS), 1986-2003**

**Description:** Master File

Contains information on participants and funding for all ECA-funded citizen exchange projects for the period 1986-2003. Data is arranged by participant and fiscal year. Information content includes detailed information on the (1) program (sponsor name and address, status, designation date and history, complaint counts, waiver counts); (2) participant/visitor (name, date of birth, address, citizenship and residency countries, number of accompanying dependents); (3) exchange visit (begin and end dates, funding amounts by category, INS entry and departure dates; and (4) IAP-66/DS-2019 form sent to sponsor organization (number, voided indicator, subject batch tracking number, date batch sent to program sponsor).

**Disposition:** Temporary. Destroy or delete when 75 years old.

**DispAuthNo:** N1-059-09-34, item 1a

**Date Edited:** 9/7/2010

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**A-36-010-07b Exchange Visitor Information System (EVIS), 1986-2003**

**Description:** Outputs

Standard and ad hoc reports used to respond to queries.

**Disposition:** Temporary. Destroy/delete when no longer needed for operational purposes.

**DispAuthNo:** N1-059-09-34, item 1b

**Date Edited:** 9/7/2010

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<b>A-36-010-07c</b>	<b>Exchange Visitor Information System (EVIS), 1986- 2003</b>
<b>Description:</b>	Documentation  Includes system code, help files, user manual, background information, etc., in electronic format stored in project folders and on a CD.
<b>Disposition:</b>	Temporary. Destroy 5 years after the project/activity/transaction is completed or superseded, or the associated system is terminated, or the associated data is migrated to a successor system. (Supersedes GRS 20, item 11a[1]).
<b>DispAuthNo:</b>	GRS 3.1, item 051 <b>Date Edited:</b> 6/18/2015
<b>A-36-010-07d</b>	<b>Exchange Visitor Information System (EVIS), 1986-2003</b>
<b>Description:</b>	Backup Files  Incremental daily and full weekly backups retained in case the master file or database is damaged or inadvertently erased.
<b>Disposition:</b>	Temporary. Destroy immediately after the identical records have been deleted or replaced by a subsequent backup file. (Supersedes GRS 20, item 8b).
<b>DispAuthNo:</b>	GRS 3.2, item 051 <b>Date Edited:</b> 6/18/2015
<b>A-36-010-08</b>	<b>Federal Exchanges Data System (FEDS)</b>
<b>Description:</b>	The Federal Exchanges Data System (FEDS) enables the Interagency Working Group on U.S Government-Sponsored International Exchanges and Training Programs (IA WG) to collect, manage and report data to the President and Congress on international exchange and training programs sponsored by the Federal Government. The IAWG is currently comprised of members from over 60 Federal Departments and Agencies, including the Department of State and its overseas posts. The Office of Exchange Coordination within the Bureau of Educational and Cultural Affairs serves as the staff for the IAWG and manages FEDS. The Assistant Secretary of the Bureau of Educational and Cultural Affairs (ECA) serves as Chair of the IAWG.
<b>Disposition:</b>	N/A
<b>DispAuthNo:</b>	N/A <b>Date Edited:</b> 11/18/2010

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**A-36-010-08a**                      **Federal Exchanges Data System (FEDS)**

**Description:**            a. Master File

FEDS collects data by fiscal year. Data includes an Inventory of Programs by Department or Agency, program descriptions, and other program-specific data; participant information by country/region and participant categories, though no personally identifiable information is included; funding information, including sources of funding by organization (private, foreign or federal); and programs linked by DOS/USAID strategic goals. Data spans the period 1998 to present.

**Disposition:**            Permanent. Cut off at end of fiscal year. Pre-accession data to NARA in 5-year blocks beginning at the end of CY2010 (i.e., 1998-2002 and 2003-2007 block in 2012, 2008-2012 block in 2017, etc.) in a format that meets NARA transfer requirements for electronic records at the time of transfer. Transfer legal custody of data to National Archives 25 years after cutoff.

**DispAuthNo:**            N1-059-09-30, item 1a

**Date Edited:**            11/18/2010

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**A-36-010-08b**                      **Intermediary Records**

**Description:**            Federal Exchanges Data System (FEDS). The system allows member groups to input data via remote data entry through an e-application to respond to the annual data call. Some respondents still send data via email for IAWG input. However, it is anticipated that in the future all data will be entered directly through a web portal, such as the current member website ([www.iawg.org](http://www.iawg.org)).

**Disposition:**            Temporary. Destroy upon verification of successful creation of the final document or file, or when no longer needed for business use, whichever is later. (Supersedes GRS 4.3 item 010; GRS 4.3, item 011; GRS 4.3, item 012; GRS 4.3, item 020; GRS 4.3, item 030; and GRS 4.3, item 031)

**DispAuthNo:**            DAA-GRS-2017-0003-0002 (G

**Date Edited:**            9/26/2017

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**A-36-010-08c**                      **Federal Exchanges Data System (FEDS)**

**Description:**            c. Outputs

Ad hoc and recurring reports.

**Disposition:**            Temporary. Destroy when no longer needed.

**DispAuthNo:**            N1-059-09-30, item 1c

**Date Edited:**            11/18/2010

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#### Deputy Assistant Secretary for Professional and Cultural Exchanges (ECA/PE)

**A-36-015-01      Subject Files**

**Description:** Arranged by subject. Reports containing information relating to the activities of the Deputy Assistant Secretary in directing and carrying out the functions and responsibilities for the Cultural Exchange programs. Includes correspondence, telegrams, memoranda, letters, policy files, reports, and related materials.

**Disposition:** PERMANENT. Cut off annually. Transfer to Department Records Service Center (RSC) three years after cutoff for transfer to a records storage facility. Transfer to the National Archives twenty-five years after cutoff in five-year blocks.

**DispAuthNo:** N1-059-05-04, item 1

**Date Edited:** 6/9/2005

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**A-36-015-02      Schedule of Daily Activities**

**Description:** Calendars, appointment books, schedules, logs, and other records documenting the daily activities of the Deputy Assistant Secretary and assistants in an official capacity, created and maintained in hard copy or electronic form. Materials determined to be "personal records" are not covered by this item.

**Disposition:** TEMPORARY. Destroy or delete when no longer needed for convenience or reference.

**DispAuthNo:** N1-059-05-04, item 2

**Date Edited:** 6/9/2005

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**A-36-015-03      Electronic Mail and Word Processing Copies**

**Description:** Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate recordkeeping copy of the records covered by other items in the schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.

**Disposition:** See items 03a and 03b for specific dispositions.

**DispAuthNo:** N1-059-05-04, item 3

**Date Edited:** 6/9/2005

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**A-36-015-03a      Electronic Mail and Word Processing Copies**

**Description:** Copies that have no further administrative value after the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives used to only to produce the recordkeeping copy.

**Disposition:** TEMPORARY. Delete within 180 days after the recordkeeping copy has been produced.

**DispAuthNo:** N1-059-05-04, item 3b

**Date Edited:** 6/9/2005

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**A-36-015-03b**                      **Electronic Mail and Word Processing Copies**

**Description:**            Copies used for dissemination, revision, or updating that are maintained in addition to the recordkeeping copy.

**Disposition:**            TEMPORARY. Delete when dissemination, revision, or updating is completed.

**DispAuthNo:**            N1-059-05-04, item 3b

**Date Edited:**            6/9/2005

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**Office of Citizen Exchanges (ECA/PE/C)****A-36-016-01 Office of the Director****Subject Files**

**Description:** Correspondence, memorandums, reports, telegrams, and other material relating to the activities of the Office of the Director of the Office of Citizen Exchanges.

**Disposition:** PERMANENT. Cut off at the end of the calendar year. Transfer to RSC when three years old for transfer to a records storage facility. Transfer to the National Archives in five-year blocks when 25 years old.

**DispAuthNo:** N1-059-05-05, item 1 **Date Edited:** 2/18/2010

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**A-36-016-02 Program Files**

**Description:** Reports, plans, correspondence, memorandums, telegrams, and other material relating to exchange programs. Included is documentation about overall policymaking conducted by the Office of the Director. Contains extra copies of incoming and outgoing telegrams, correspondence, and memorandums. Files are for reference only.

**Disposition:** PERMANENT. Cut off at the end of the calendar year. Transfer to RSC when three years old for transfer to a records storage facility. Transfer to the National Archives in five-year blocks when 25 years old.

**DispAuthNo:** N1-059-05-05, item 2 **Date Edited:** 6/9/2005

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**A-36-016-03 Congressional Correspondence**

**Description:** Contains copies of each incoming Congressional inquiry referred to Citizen Exchanges and copy of the response.

**Disposition:** TEMPORARY. Cut off at the end of the calendar year. Destroy when 2 years old or no longer needed, whichever is sooner.

**DispAuthNo:** N1-059-05-05, item 3 **Date Edited:** 6/9/2005

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**A-36-016-04 Country Files DIVISION FILES**

**Description:** Arranged by name of country. Correspondence, reports, memorandums, evaluations, agreements, program proposals, telegrams, and other material relating to overall policymaking and coordination relating to citizen exchanges and to the operation of citizen exchanges carried out by all divisions.

**Disposition:** PERMANENT. Break file annually. Transfer to RSC when two years old for transfer to a records storage facility. Transfer to the National Archives in five-year blocks when 25 years old.

**DispAuthNo:** N1-059-05-05, item 4 **Date Edited:** 6/9/2005

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#### A-36-016-05 Grantee Files

**Description:** Contains individual grantee program or project files and team programs involving more than one grantee on all categories of grantees concerning the program. Includes grantees application, biographic data sheet, security clearance, grant award, reports of study or training, evaluation date and related correspondence.

**Disposition:** TEMPORARY. Cut off on termination of grant. Transfer to RSC two years after termination of grant for transfer to a record storage facility. Destroy 25 years after termination.

**DispAuthNo:** N1-059-05-05, item 5 **Date Edited:** 6/9/2005

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#### A-36-016-06 Project Working Papers

**Description:** Contains files of program development officer information (memos, telegrams, other correspondence) on the International Youth Exchange.

**Disposition:** TEMPORARY. Destroy six months after final action on project report or three years after completion of report if no final action is taken.

**DispAuthNo:** N1-059-05-05, item 6 **Date Edited:** 6/9/2005

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#### A-36-016-07 Photo Files

**Description:** Contains photos of grantees involved with the Youth Exchange Program. The photos contain the grantees and different high-level government officials from around the world. These photos are used for publications and annual reports.

**Disposition:** TEMPORARY. Transfer to RSC when two years old. Destroy when five years old.

**DispAuthNo:** N1-059-05-05, item 7 **Date Edited:** 6/9/2005

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#### A-36-016-08 Electronic Mail and Word Processing Copies

**Description:** Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate recordkeeping copy of the records covered by other items in the schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.

**Disposition:** See items 08a and 08b for specific dispositions.

**DispAuthNo:** N1-059-05-05, item 8 **Date Edited:** 6/9/2005

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<b>A-36-016-08a</b>	<b>Electronic Mail and Word Processing Copies</b>
<b>Description:</b>	Copies that have no further administrative value after the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives used to only to produce the recordkeeping copy.
<b>Disposition:</b>	TEMPORARY. Delete within 180 days after the recordkeeping copy has been produced.
<b>DispAuthNo:</b>	N1-059-05-05, item 8a
	<b>Date Edited:</b> 6/9/2005
<b>A-36-016-08b</b>	<b>Electronic Mail and Word Processing Copies</b>
<b>Description:</b>	Copies used for dissemination, revision, or updating that are maintained in addition to the recordkeeping copy.
<b>Disposition:</b>	TEMPORARY. Delete when dissemination, revision, or updating is completed.
<b>DispAuthNo:</b>	N1-059-05-05, item 8b
	<b>Date Edited:</b> 6/9/2005
<b>A-36-016-09</b>	<b>EUREKA</b>
<b>Description:</b>	EUREKA is an electronic information system designed to track participants, funding, itineraries, and organization information on all institutional grants and cooperative agreements with U.S. not-for-profit institutions for professional, cultural, and youth exchanges. Overall grant making authority for this program is contained in the Mutual Educational and Cultural Exchange Act of 1961, also known as the Fulbright-Hays Act. Participants may be U.S. citizens who are participating in an exchange program overseas, or non-citizens who are participating in an exchange program in the U.S. EUREKA includes data migrated from legacy systems (Culture Connect Envoys Workflow and its predecessor the American Cultural Specialist Database), and spans the period 1996 to present.
<b>Disposition:</b>	N/A
<b>DispAuthNo:</b>	N/A
	<b>Date Edited:</b> 8/5/2010

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<b>A-36-016-09a</b>	<b>EUREKA</b>
<b>Description:</b>	a. Master File  Information content includes detailed information on (1) the specific exchange project; (2) the not-for-profit organization sponsoring the project; and (3) the participants, including: participant name, program name, disability status, SEVIS ID Number, country of citizenship, gender, date of birth, place of birth, occupation, marital status, passport number, expiration date, and place of issue, Social Security Number, address, and contact information.
<b>Disposition:</b>	Temporary. Cut off at end of fiscal year when grant/cooperative agreement ends. Destroy or delete when 75 years old.
<b>DispAuthNo:</b>	N1-059-09-32, item 1a <b>Date Edited:</b> 8/5/2010
<b>A-36-016-09b</b>	<b>Intermediary Records</b>
<b>Description:</b>	EUREKA. Includes electronic records entered into the system during an update process, and not required for audit or legal purposes.
<b>Disposition:</b>	Temporary. Destroy upon verification of successful creation of the final document or file, or when no longer needed for business use, whichever is later. (Supersedes GRS 4.3 item 010; GRS 4.3, item 011; GRS 4.3, item 012; GRS 4.3, item 020; GRS 4.3, item 030; and GRS 4.3, item 031)
<b>DispAuthNo:</b>	DAA-GRS-2017-0003-0002 (G <b>Date Edited:</b> 9/26/2017
<b>A-36-016-09c</b>	<b>EUREKA</b>
<b>Description:</b>	c. Outputs  Standard and ad hoc reports used for management purposes, as well as data exports to other systems for support services.
<b>Disposition:</b>	Temporary. Delete after recordkeeping copy is produced or when no longer needed for operational purposes, whichever is later.
<b>DispAuthNo:</b>	N1-059-09-32, item 1c <b>Date Edited:</b> 8/5/2010

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**A-36-016-09d**            **EUREKA**

**Description:**        d. Documentation

Includes data system specifications and user guides.

**Disposition:**        Destroy 5 years after the project/activity/transaction is completed or superseded, or the associated system is terminated, or the associated data is migrated to a successor system. (Supersedes GRS 20, item 11a[1]).

**DispAuthNo:**        GRS 3.1, item 051

**Date Edited:**        6/18/2015

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**A-36-016-09e**            **EUREKA**

**Description:**        e. Backups

Daily incremental and full weekly production database backups.

**Disposition:**        Temporary. Destroy immediately after the identical records have been deleted or replaced by a subsequent backup file. (Supersedes GRS 20, item 8b).

**DispAuthNo:**        GRS 3.2, item 051

**Date Edited:**        6/18/2015

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**Office of International Visitors (ECA/PE/V)****A-36-018-01 Exchange Visitor Database-Enhanced (EVDBe)**

**Description:** EVDBe tracks all International Visitor (IV) projects and participants, program costs by project, and participant itineraries in support of the International Visitor Leadership Program (IVLP) which each year brings over 4,000 foreign nationals from around the world, who are current or potential leaders in government, politics, the media, education, the arts, business, etc., to meet and confer with their professional counterparts and experience the U.S. firsthand. Participants may be either fully or partially funded by the Office of International Visitors, which works in concert with a broad range of private, not-for-profit organizations under cooperative agreements with the Department of State. EVDBe supports nominations, assignments to program agencies, and collaboration with program agencies and volunteer groups on project design and production of program books. It contains budget and program data from 1996 to present.

**Disposition:** See items 01a-01e for disposition instructions.

**DispAuthNo:** N/A

**Date Edited:** 11/1/2010

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**A-36-018-01a Exchange Visitor Database-Enhanced (EVDBe)**

**Description:** a. Master File

Content includes detailed information on (1) the specific IVLP project, including program itinerary and substantive content; (2) the not-for-profit organization administering the project; (3) the volunteer groups assisting with the project; (4) project funding; and (5) the participants, including: participant name, country of citizenship, gender, date of birth, place of birth, occupation, marital status, SEVIS ID number, address and contact information.

**Disposition:** Temporary. Cut off at end of fiscal year in which project ends. Destroy or delete when 75 years old.

**DispAuthNo:** N1-059-09-33, item 1a

**Date Edited:** 11/1/2010

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**A-36-018-01b Intermediary Records**

**Description:** Exchange Visitor Database-Enhanced (EVDBe) electronic records entered into the system during an update process and not required for audit or legal purposes. Records include Special Initiative Programs and International Visitors Leadership Program Project Files produced as adhoc reports used for one-time reference or to create subsequent reports.

**Disposition:** Temporary. Destroy upon verification of successful creation of the final document or file, or when no longer needed for business use, whichever is later. (Supersedes GRS 4.3 item 010; GRS 4.3, item 011; GRS 4.3, item 012; GRS 4.3, item 020; GRS 4.3, item 030; and GRS 4.3, item 031)

**DispAuthNo:** DAA-GRS-2017-0003-0002 (G

**Date Edited:** 9/28/2017

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**A-36-018-02 International Visitors Leadership Program - Project Files**

**Description:** Records created/accumulated in the course of administering the program, which brings individuals identified as potential leaders in a variety of fields to the US to meet with professional counterparts and participate in programs relevant to their field of interest. American embassy staff select the individuals; PE/V provides full or partial funding. PE/V also designs the programs and handles logistics and administration, in concert with non-profit National Program Agencies and volunteer groups known collectively as Councils for International Visitors. Projects may be for individuals or groups; groups may be from one country or a region. The New York Program Branch (ECA/PE/V/C/N) develops that portion of the program for participants visiting New York City. Records are usually arranged alphabetically by country/region, with individual projects alphabetically thereunder. Files typically include participant names and financial allotment, proposed and final budgets, flight approvals, itineraries, program books for each stop (hotel, events, contact people, etc.), interpreter requests, interpreter reports and Post reports.

**Disposition:**

**DispAuthNo:** N/A **Date Edited:** 4/30/2013

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**A-36-018-02a International Visitors Leadership Program - Project Files**

**Description:** Files not duplicated in the Exchange Visitor Database-Enhanced (EVDBe)

**Disposition:** TEMPORARY. Destroy/delete when 75 years old.

**DispAuthNo:** DAA-0059-2012-0009-0001 **Date Edited:** 4/30/2013

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**A-36-018-03 Special Initiative Programs**

**Description:** Records created/accumulated in developing and administering programs aimed at specific regions, socio-economic groups, professions (the Edward R. Murrow Program for Journalists, for example), or commemorating specific events.

**Disposition:**

**DispAuthNo:** N/A **Date Edited:** 4/30/2013

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**A-36-018-03a Special Initiative Programs**

**Description:** Files not duplicated in the Exchange Visitor Database-Enhanced (EVDBe)

**Disposition:** TEMPORARY. Destroy/delete when 75 years old.

**DispAuthNo:** DAA-0059-2012-0009-0003 **Date Edited:** 4/30/2013

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<b>A-36-018-04</b>	<b>Grants Officer Representative (GOR)/Cooperative Agreement Files</b>
<b>Description:</b>	Office copies of administrative records relating to the solicitation, review, and award process for institutional grants and cooperative agreements administered by ECA. Records include requests for grant proposals, approved solicitation, approved concurrence memorandums, internal approval documentation, and related material.
<b>Disposition:</b>	TEMPORARY. Destroy/delete 3 years after the close of the fiscal year involved.
<b>DispAuthNo:</b>	DAA-0059-2012-0009-0005 <b>Date Edited:</b> 5/10/2013
<b>A-36-018-05</b>	<b>Budget Preparation Background Records</b>
<b>Description:</b>	Records held at all other offices. Preliminary budget estimates, justifications, cost statements, narrative statements, rough data, and similar materials from internal agency components (individual offices, divisions, programs, etc.) for use in preparing annual, agency-wide budget requests.
<b>Disposition:</b>	Temporary. Destroy when 2 years old, but longer retention is authorized if required for business use. (Supersedes GRS 5, item 2)
<b>DispAuthNo:</b>	DAA-GRS-2015-0006-0006 (G <b>Date Edited:</b> 1/18/2018
<b>A-36-018-06</b>	<b>Financial Plans</b>
<b>Description:</b>	Financial plans and related worksheets, quarterly quota sheets, grantee financial reports and communications.
<b>Disposition:</b>	TEMPORARY. Destroy/delete 3 years after close of fiscal year in which prepared.
<b>DispAuthNo:</b>	NC1-059-77-26, item 1 (A-03- <b>Date Edited:</b> 5/10/2013
<b>A-36-018-07</b>	<b>SmartPay Worldwide Purchase Card (Government Credit Card) Files - Arranged by fiscal year</b>
<b>Description:</b>	Copies of monthly credit card statements, receipts, and related documentation.  NOTE: Signed original of Monthly Credit Card Statement is maintained by the Office of Finance for 6 years and 3 months (GRS 6, item 1a). Supersedes the International Merchant Purchase Authorization Card (I.M.P.A.C.) program.
<b>Disposition:</b>	TEMPORARY: Destroy/delete after GAO audit or when 3 years old, whichever is sooner.
<b>DispAuthNo:</b>	N1-059-96-29, item 1 <b>Date Edited:</b> 5/10/2013

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**A-36-018-08**      **Administrative Records Maintained in any Agency Office**

**Description:**      Supplies, Services and Equipment including form requests such as OF-263, OF-263A, DS-1089 , DS-1089A, and DS-5R.

Records accumulated by individual offices that relate to routine day-to-day administration and management of the office rather than the mission-specific activities for which the office exists. Records include:

- staff locators, unofficial organizational charts, and office seating charts (see Exclusion 1)
- office-level administrative policies and procedures and files related to their development (see Note 1)
- calendars or schedules of daily activities of non-high-level officials (high-level officials are defined in GRS 6.1; this item covers those positions not defined as high-level)
- informal requests and tracking of personnel training, travel, supplies, and equipment, excluding procurement and payment records and forms requesting training (e.g. SF-182)
- internal office activity and workload reports
- studies and analyses of office administrative functions and activities
- non-mission related management reviews and surveys
- minutes of meetings related to administrative activities

Exclusion 1: This item does not apply to recordkeeping copies of organizational charts, functional statements, and related records that document the mission-related organization, staffing, and procedures of the office. Agencies must schedule those records on an agency-specific schedule.

Note 1: This item covers administrative policies and procedures at the office/unit level. GRS 5.7 covers agency-level administrative issuances or directives.

**Disposition:**      Temporary. Destroy when business use ceases. (Supersedes GRS 23, item 1)

**DispAuthNo:**      DAA-GRS-2016-0016-0001 (G      **Date Edited:**      9/21/2017

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**A-36-018-09 Supervisors' Personnel Files**

**Description:** Records on positions, authorizations, pending actions, position descriptions, training records, individual development plans, telework agreements, award recommendations, and records on individual employees not duplicated in or not appropriate for the OPF. These records are sometimes called supervisors' working files, unofficial personnel files (UPFs), and employee work folders or "drop" files.

Exclusion 1: Records that become part of a grievance file, an appeal or discrimination complaint file, a performance-based reduction-in-grade or removal action, or an adverse action. These records are covered under GRS 2.3, Employee Relations Records.

Exclusion 2: Employee medical documents, unless part of employee's initial request for reasonable accommodation. Following approval, the agency's reasonable accommodation decision replaces medical documentation and becomes the record. Reasonable accommodation employee case files are covered under GRS 2.3, Employee Relations Records.

**Disposition:** Temporary. Review annually and destroy superseded documents. Destroy remaining documents 1 year after employee separation or transfer. (Supersedes GRS 1, item 18a and GRS 1, item 18b)

**DispAuthNo:** DAA-GRS-2017-0007-0012 (G) **Date Edited:** 9/1/2017

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#### Office of Policy and Evaluation (ECA/P/V) Office of the Director

**A-36-019-01 Program Policy Files**

**Description:** Arranged by subject. Reports containing information relating to the policy and evaluation responsibilities of the Office. Includes correspondence, telegrams, memoranda, letters, policy files, reports, and related materials. Break files annually.

**Disposition:** PERMANENT: Transfer to Department Records Service Center (RSC) three years after cutoff. Transfer to WNRC when ten years old. Transfer to the National Archives twenty-five years after cutoff in five-year blocks.

**DispAuthNo:** N1-059-06-01, item 1

**Date Edited:** 6/29/2006

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**A-36-019-02 Administrative Files**

**Description:** Arranged chronologically. Files containing information relating to the activities, functions, duties, and responsibilities of the Office staff. Includes reports, correspondence, memoranda, telegrams, project records, policy files, and other material related to Policy and Evaluation. Break files annually.

**Disposition:** TEMPORARY: Transfer to Records Service Center (RSC) when one year old or inactive. Destroy when five years old.

**DispAuthNo:** N1-059-06-01, item 2

**Date Edited:** 6/30/2006

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**A-36-019-03 Alumni Database**

**Description:** Database of persons who have participated in a program fully or partially funded by the Bureau of Educational and Cultural Affairs (ECA) or predecessor organizations since 1970 for the purpose of coordinating or arranging alumni activities around the world. Records potentially include the following information: name, sex, birth date, death date, citizenship, home and business addresses, personal contact information about U.S. cities or states visited as part of a program.

**Disposition:** TEMPORARY: Destroy records no later than 75 years after birth date or earlier, if appropriate.

**DispAuthNo:** N1-059-06-01, item 3

**Date Edited:** 6/30/2006

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**A-36-019-04 Alumni Program Files**

**Description:** Files are organized by ECA component. Contain information on the programs managed by the organization. Describe purpose and aims of the program. Files include correspondence, telegrams, memoranda, reports, project proposal, and related material.

**Disposition:** PERMANENT: Transfer to Records Service Center (RSC) when program changes or ceases. Transfer to National Archives when 25-years old.

**DispAuthNo:** N1-059-06-01, item 4

**Date Edited:** 6/30/2006

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**A-36-019-05 Project Evaluations**

**Description:** Evaluations are formal reports prepared by an evaluation officer and are published. The evaluations assess the value of the project, document results and achievements, and determine if the project is successful as planned. Files include an evaluation summary, executive summary, and final report.

**Disposition:** PERMANENT: Retire completed evaluations and documentation to Records Service Center (RSC) one year after completion. Transfer to National Archives when 25 years old.

**DispAuthNo:** N1-059-06-01, item 5 **Date Edited:** 6/30/2006

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**A-36-019-06 Electronic Mail and Word Processing System Copies**

**Description:** Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate a recordkeeping copy of the records covered by the other items in the schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.

**Disposition:** N/A: See below items for specific disposition.

**DispAuthNo:** N/A **Date Edited:** 12/16/2011

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**A-36-019-06a Electronic Mail and Word Processing System Copies**

**Description:** a. Copies that have no further administrative value after the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recordkeeping copy.

**Disposition:** TEMPORARY: Delete within 180 days after the recordkeeping copy has been produced.

**DispAuthNo:** N1-059-06-01, item 6a **Date Edited:** 6/30/2006

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**A-36-019-06b Electronic Mail and Word Processing System Copies**

**Description:** b. Copies used for updating, revision, or dissemination, that are maintained in addition to the recordkeeping copy.

**Disposition:** TEMPORARY: Delete when updating, revision, or dissemination is completed.

**DispAuthNo:** N1-059-06-01, item 6b **Date Edited:** 6/30/2006

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**J. William Fulbright Scholarship Board (ECA/FFSB)****A-36-020-01 Meeting and Background Files of the Board and Its Executive Planning Committee**

**Description:** Briefing packages for each meeting with agendas and related material; minutes of the meetings including transcripts; correspondence, memorandums, and other materials documenting activities of the Board; and reports of the Board.

**Disposition:** PERMANENT. Break file annually. Transfer to Department Records Service Center (RSC) when 3-years old for transfer to a records storage facility. Transfer to the National Archives in 5-year blocks when 25-years old.

**DispAuthNo:** N1-059-05-06, item 1 **Date Edited:** 4/19/2006

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**A-36-020-02 Membership Files. Correspondence and other records concerning members and former members of the Board.**

**Description:** Records that include significant activities and achievements and reports of Board members, past and present.

**Disposition:** PERMANENT. Break file annually. Transfer file to the Department Records Service Center (RSC) one year after termination of appointment or when volume warrants for transfer to a records storage facility. Transfer to the National Archives when 25 years old.

**DispAuthNo:** N1-059-05-06, item 2 **Date Edited:** 4/21/2006

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**A-36-020-03 Reports to Congress. Annual reports from BFS to Congress**

**Description:** Record copy of report and supporting documentation.

**Disposition:** PERMANENT. Remove and destroy all administrative documents (requests for copies, distribution lists, transmittal lists, acknowledgments of receipt, etc.) when 2-years old. Transfer to the Department Records Service Center (RSC) when 3-years old for transfer to a records storage facility. Transfer to National Archives in 5-year blocks when latest records are 25 years old.

**DispAuthNo:** N1-059-05-06, item 3 **Date Edited:** 4/21/2006

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**A-36-020-04 Academic Exchange Program Proposals.**

**Description:** Annual program proposals submitted by Foundation Commissions and by other Fulbright exchange programs, includes analysis of the proposals. (Record copies are maintained by the Office of Academic Programs).

**Disposition:** TEMPORARY. Destroy when 3 years old or when no longer needed; whichever is sooner.

**DispAuthNo:** N1-059-05-06, item 4 **Date Edited:** 12/16/2011

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#### A-36-020-05 Foundation/Commission Treaties

**Description:** Copies of agreements between the United States relating to academic exchange programs. (Record copies are maintained by the Office of Treaty Affairs).

**Disposition:** TEMPORARY. Destroy upon termination of treaty or when no longer needed; whichever is sooner.

**DispAuthNo:** N1-059-05-06, item 5

**Date Edited:** 6/18/2015

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#### A-36-020-06 Subject and Country Files

**Description:** Reports, correspondence, telegrams, memorandums, plans, proposals, minutes of meetings, reports, and other documentation. Records relate to the operation of academic exchange programs with specific countries, cooperating agencies, specific institutions and organizations that assist the BFS and are contracted by the Agency to supervise the day-to-day activities of exchange programs, cooperation with other offices in the Department of State, other U.S. Government agencies, other organizations, and other related activities.

**Disposition:** PERMANENT. Break file as needed. Transfer file to the Department Records Service Center (RSC) for transfer to a records storage facility. Transfer to the National Archives when 25 years old.

**DispAuthNo:** N1-059-05-06, item 6

**Date Edited:** 6/18/2015

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#### A-36-020-07 Reports Files

**Description:** Reports of Foundatin/Commissions, cooperating Agencies and evaluations thereof. Annual reports submitted by Foundation, Commissions, and Cooperating Agencies.

**Disposition:** PERMANENT. Break file annually. Transfer to the Department Records Service Center (RSC) when 3-years old for transfer to a records storage facility. Transfer to the National Archives in 5-year blocks when 25-years old.

**DispAuthNo:** N1-059-05-06, item 7

**Date Edited:** 6/18/2015

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**Cultural Property Advisory Committee (ECA/P/C)****A-36-021-01 Meeting Files**

**Description:** Contains agendas, memorandums, minutes of meetings, meeting announcements, correspondence, testimony, and other material relating to the policies, plans, and activities of the Cultural Property Advisory Committee.

**Disposition:** PERMANENT. Break file annually. Retire to RSC when 2 years old for transfer to a records storage facility when 7 years old. Transfer to the National Archives when 25 years old in 5 year blocks.

**DispAuthNo:** N1-059-05-07, item 1

**Date Edited:** 6/9/2005

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**A-36-021-02 Country Import Restriction Request Files**

**Description:** Arranged by country. Contains requests received by ECA from other countries and referred to the Committee for review. All aspects of the review and investigation process and the preparation of Committee reports, photographs of typical artifacts, lists of experts to identify artifacts, and correspondence and U.S. Customs documents implementing import restrictions are kept. Also, contains records of the Committee ongoing review of effectiveness of the import restrictions and reports to the President and the Congress.

**Disposition:** PERMANENT. Retire records to the RSC 2 years after the expiration of restrictions for transfer to a records storage facility 7 years after expiration of restrictions. Transfer to the National Archives when 25 years old in 5 year blocks.

**DispAuthNo:** N1-059-05-07, item 2

**Date Edited:** 6/9/2005

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**A-36-021-03 Country Files**

**Description:** Arranged by name of country. Contains files arranged by country and foreign service post. These include correspondence, country plans, foreign legislation, newspaper articles, and any issues and concerns of a specific country.

**Disposition:** PERMANENT. Break file when restriction expires. Retire to RSC when 2 years old for transfer to a records storage facility when 7 years old. Transfer to the National Archives when 25 years old.

**DispAuthNo:** N1-059-05-07, item 3

**Date Edited:** 6/9/2005

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**A-36-021-04      Subject Files**

**Description:** Arranged by subject. Contains files relating to the program activities of the Administrative Staff of the Cultural Property Advisory Committee. Included is correspondence, country information, periodical literature, and other material relating to major issues involving international cultural property.

**Disposition:** PERMANENT. Break file annually. Retire to RSC when 2 years old for transfer to a records storage facility when 7 years old. Transfer to the National Archives when 25 years old in 5 year blocks.

**DispAuthNo:** N1-059-05-07, item 4

**Date Edited:** 6/9/2005

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**A-36-021-05      Ambassador Fund for Cultural Preservation****Funded Project Program Files**

**Description:** The records covered by this item include reports, plans, correspondence, memorandums, and other material relating to projects funded by the congressionally mandated Ambassador Fund for Cultural Preservation. Included is documentation about overall policymaking relating to Ambassador Fund for Cultural Preservation activity.

**Disposition:** PERMANENT. Retire to RSC when 2 years old for transfer to a records storage facility when 7 years old. Transfer to the National Archives when 25 years old in 5 year blocks.

**DispAuthNo:** N1-059-05-07, item 5

**Date Edited:** 6/9/2005

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**A-36-021-06      Annual Reports (Ambassador Fund)**

**Description:** This item covers the Ambassador Fund for Cultural Preservation Annual Reports to Congress.

**Disposition:** PERMANENT. Retire to RSC when 2 years old for transfer to a records storage facility when 7 years old. Transfer to the National Archives when 25 years old in 5 year blocks.

**DispAuthNo:** N1-059-05-07, item 6

**Date Edited:** 6/9/2005

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**A-36-021-07 Cultural Antiquities Task Force****Cultural Heritage Files**

**Description:** The records covered by this item include reports, plans, correspondence, memorandums, and other material relating to the program activities of the congressionally mandated Cultural Antiquities Task Force. Included is documentation about overall policymaking relating to Cultural Antiquities Task Force activities.

**Disposition:** PERMANENT. Retire to RSC when 2 years old for transfer to a records storage facility when 7 years old. Transfer to the National Archives when 25 years old in 5 year blocks.

**DispAuthNo:** N1-059-05-07, item 7 **Date Edited:** 6/9/2005

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**A-36-021-08 Annual Reports (Cultural Antiquities)**

**Description:** This item covers the Cultural Antiquities Task Force Annual Reports to Congress.

**Disposition:** PERMANENT. Retire to RSC when 2 years old for transfer to a records storage facility when 7 years old. Transfer to the National Archives when 25 years old in 5 year blocks.

**DispAuthNo:** N1-059-05-07, item 8 **Date Edited:** 6/9/2005

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**A-36-021-09 Electronic Mail and Word Processing Copies**

**Description:** Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate recordkeeping copy of the records covered by other items in the schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.

**Disposition:** See items 09a and 09b for specific dispositions.

**DispAuthNo:** N1-059-05-07, item 9 **Date Edited:** 6/9/2005

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**A-36-021-09a Electronic Mail and Word Processing Copies**

**Description:** Copies that have no further administrative value after the recordkeeping copy has been made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives used only to produce the recordkeeping copy.

**Disposition:** TEMPORARY. Delete within 180 days after the recordkeeping copy has been produced.

**DispAuthNo:** N1-059-05-07, item 9a **Date Edited:** 12/16/2011

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**A-36-021-09b**                      **Electronic Mail and Word Processing Copies**

**Description:**            Copies used for dissemination, revision, or updating that are maintained in addition to the recordkeeping copy.

**Disposition:**            TEMPORARY: Delete when dissemination, revision, or updating is completed.

**DispAuthNo:**            N1-059-05-07, item 9b

**Date Edited:**            6/9/2005

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