



[REDACTED]

December 10, 2024

Jason Leopold
Senior Investigative Reporter
Bloomberg News
[REDACTED]

RE: Freedom of Information Act Request NGC25-062

Dear Mr. Leopold:

This is in response to your Freedom of Information Act (FOIA) request dated November 7, 2024. Your request was received by the Operational FOIA and Access Division on the same date, via the foia@nara.gov inbox and assigned internal tracking number NGC25-062. In your FOIA request you stated you are seeking:

Copies of all NARA transition briefing and transition materials prepared for President-Elect Donald Trump and Vice President-Elect JD Vance and their administration or being prepared for President-Elect Donald Trump and Vice President-Elect JD Vance and their administration.

After conducting a search, we located one (1) document totaling 74 pages. The document is being released in part with partial redactions pursuant to Freedom of Information Act, 5 U.S.C. §552 (b)(6). Exemption (b)(6) protects the release of information the disclosure of which would constitute a clearly unwarranted invasion of personal privacy.

This completes the processing of your FOIA request.

If you are not satisfied with our action on this request, you have the right to file an administrative appeal within ninety (90) calendar days from the date of this letter via regular U.S. mail or email. By filing an appeal, you preserve your rights under FOIA and give the agency a chance to review and reconsider your request and the agency's decision. If you submit your appeal in writing, please address it to the Deputy Archivist of the United States (ND), National Archives and Records Administration, 8601 Adelphi Road, College Park, Maryland 20740. Both the letter and

the envelope should be clearly marked “Freedom of Information Act Appeal.” If you submit your appeal by email please send it to FOIA@nara.gov, also addressed to the Deputy Archivist of the United States. Please be sure to explain why you believe this response does not meet the requirements of the FOIA. All correspondence should reference your case tracking number **NGC25-062**.

If you would like to discuss our response before filing an appeal to attempt to resolve your dispute without going through the appeals process, you may contact our FOIA Public Liaison Gary M. Stern for assistance at:

National Archives and Records Administration
8601 Adelphi Road, Room 3110
College Park, MD 20740-6001
301-837-1750
ngc.foia.liaison@nara.gov

You may also contact the Office of Government Information Services (OGIS), the Federal FOIA Ombudsman’s office, which offers mediation services to help resolve disputes between FOIA requesters and Federal agencies. The contact information for OGIS is noted below:

Office of Government Information Services
National Archives and Records Administration
8601 Adelphi Road–OG
College Park, MD 20740-6001
ogis@nara.gov
<https://www.archives.gov/ogis>
202-741-5770 or toll free 1-877-684-6448

Thank you for contacting the National Archives and Records Administration. Please feel free to contact me directly if you have any questions or further concerns.

Sincerely,

Jodi Foor
Deputy FOIA Officer
Operational FOIA and Access Division
National Archives and Records Administration
8601 Adelphi Road
College Park, Maryland, 20740-6001
301-837-3642



PRESIDENTIAL TRANSITION 2024-2025

NATIONAL ARCHIVES *and* RECORDS ADMINISTRATION



PRESIDENTIAL TRANSITION 2024–2025

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PRESIDENTIAL TRANSITION 2024–2025

I. Agency Overview



MISSION STATEMENT

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

STRATEGIC GOALS

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

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

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

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



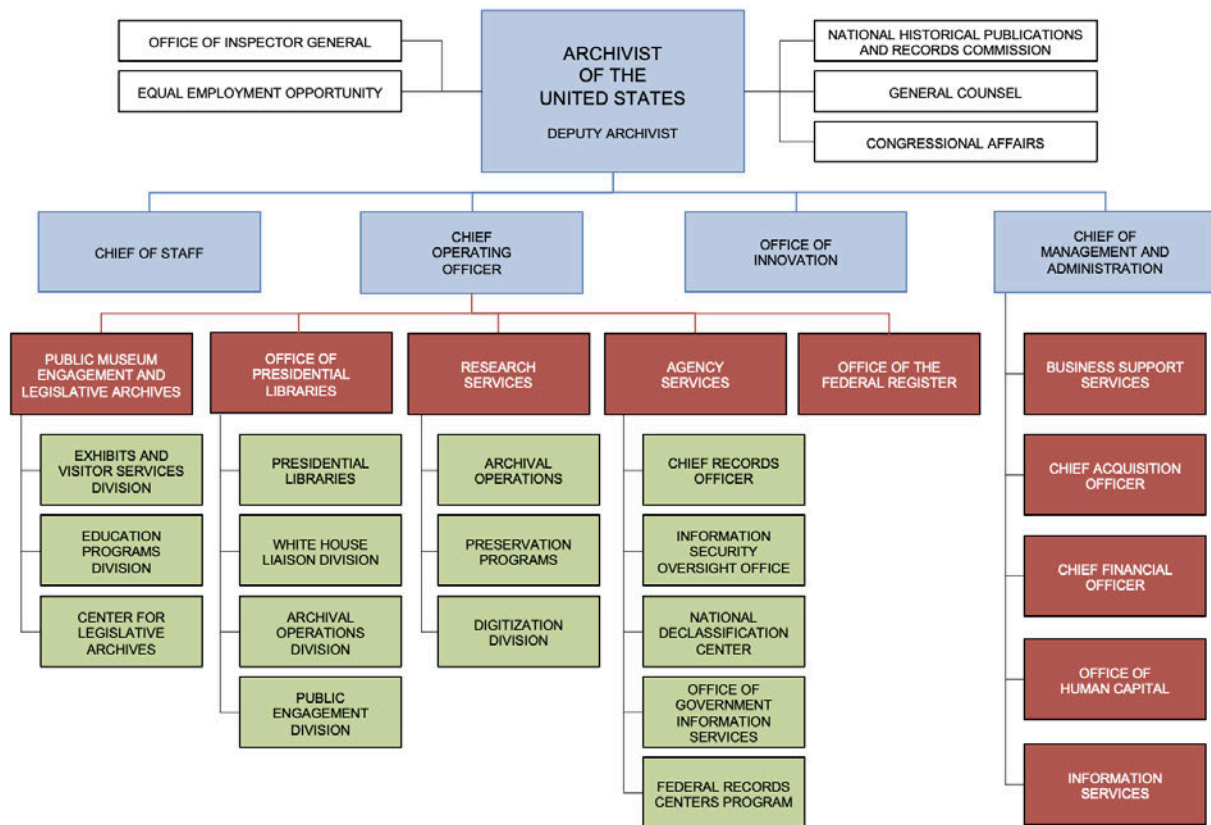
NARA GEOGRAPHIC LOCATIONS

NARA has 40 facilities in 17 states and the District of Columbia. NARA facilities provide for archival storage, Federal Records Centers, and Presidential Libraries. NARA owns three Archives buildings (Washington, DC, College Park, MD, and Atlanta, GA) and 15 Presidential Libraries and Museums.

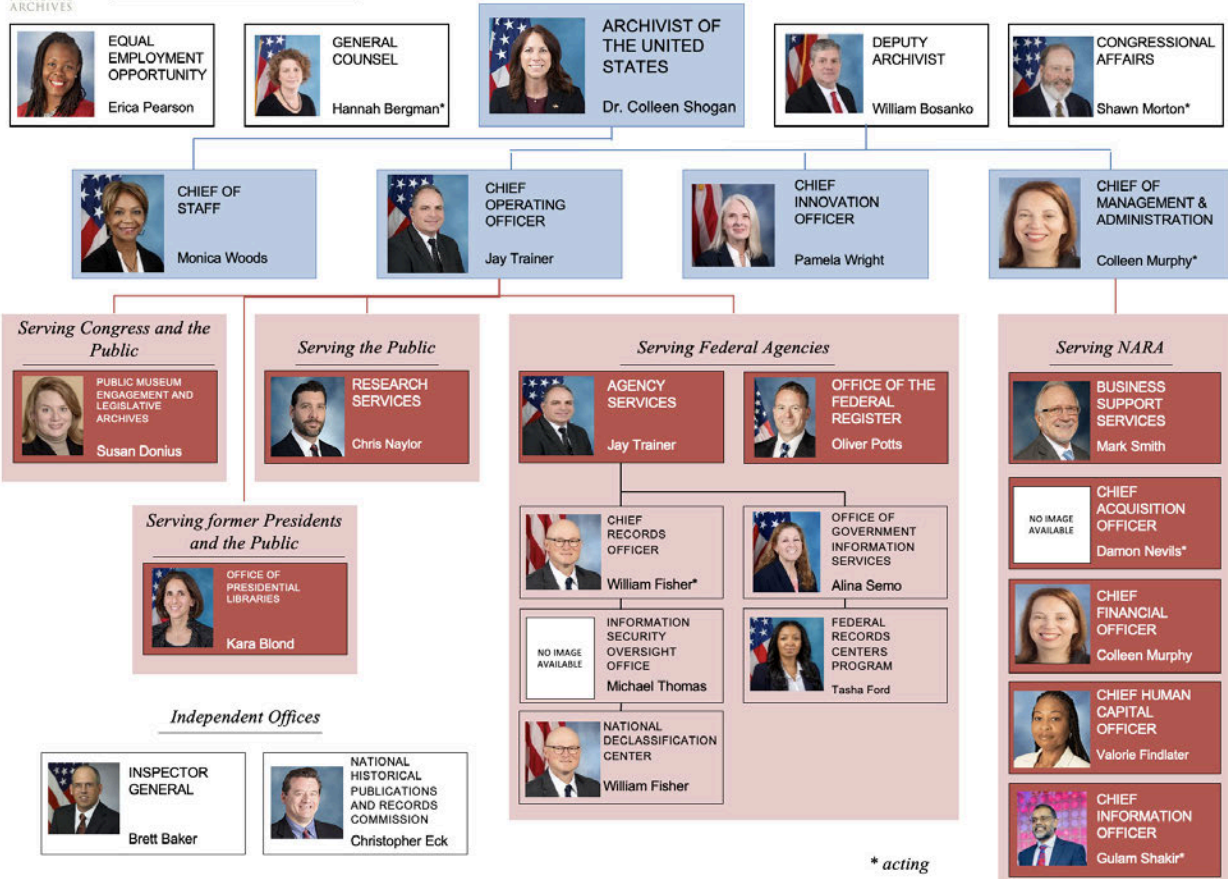




NARA ORGANIZATION



NARA LEADERSHIP



* acting



NARA FUNDS AND ACCOUNTS

Discretionary Appropriations:

Operating Expenses (annual)

Authorized by the organic authority of Title 44, U.S. Code

Provides for NARA operations, including:

- Archival operations, records management, & related functions
- Presidential Libraries & the Office of Presidential Materials
- Electronic Records Archives (ERA) system
- Office of the Federal Register (salaries and expenses)
- NARA management and administration (allocated)

Electronic Records Initiative (no-year) – expenses necessary to enhance the Federal Government's ability to electronically preserve, manage, and store Government records

Collects reimbursable income for reproductions provided to the public (through the Trust Fund)

Office of Inspector General (annual)

Authorized by the Inspector General Act of 1978, as amended

Provides for audits and investigations of NARA programs

Repairs and Restoration (no-year)

Authorized by the organic authority of Title 44, U.S. Code

Provides for repairs and renovations to NARA-owned facilities

National Historical Publications and Records Commission (NHPRC)

Grants Program (no-year)

Authorized by 44 U.S.C. § 2504

Provides for grants only; administrative costs (including salaries and expenses) are provided by Operating Expenses

Revolving Fund:

Federal Records Centers Revolving Fund (discretionary)

Authorized by 44 U.S.C. § 2901 note

Provides for the Federal Records Centers Program:

- Storage and related services for temporary and pre-accessioned Federal records
- Customers are other Federal agencies
- Operates on a full cost recovery basis
- Carry-over limited to 4% of annual revenues
- Includes allocated costs of NARA management and administration

Collects reimbursable income for reproductions provided to the public (through the Trust Fund)

Trust Fund:

National Archives Trust Fund (mandatory)

Authorized by 44 U.S.C. § 2307

Allows NARA to collect fees from the public, for:

- Reproductions of records in NARA holdings
- Sales of publications and products
- Admission fees to museums at Presidential Libraries

National Archives Gift Fund (mandatory)

Authorized by 44 U.S.C. § 2307

Permits NARA to solicit and receive conditional and unconditional gifts from non-Federal sources



NARA ORGANIZATIONS AND FUNDS

Office of the Archivist:

- Operating Expenses
- Records Centers Revolving Fund (allocated)
- NHPRC Grants Program
- National Archives Gift Fund

Office of Innovation:

- Operating Expenses

Office of the Chief of Staff:

- Operating Expenses
- Records Centers Revolving Fund (allocated)

Office of the Chief Operating Officer:

- Operating Expenses
- Records Centers Revolving Fund (allocated)

Public Museum Engagement and Legislative Archives:

- Operating Expenses
- National Archives Trust Fund
- National Archives Gift Fund

Office of Presidential Libraries:

- Operating Expenses
- National Archives Trust Fund (reproduction orders)
- National Archives Gift Fund

Research Services:

- Operating Expenses
- National Archives Trust Fund (reproduction orders)
- National Archives Gift Fund

Agency Services:

- Operating Expenses
- Records Centers Revolving Fund
- National Archives Trust Fund (reproduction orders)

Office of the Federal Register:

- Operating Expenses
- GPO Page-Rate Fund

Office of the Chief of Management and Administration:

- Operating Expenses
- Records Centers Revolving Fund (allocated)

Business Support Services:

- Operating Expenses
- Records Centers Revolving Fund (allocated)
- Repairs and Restoration

Office of the Chief Acquisition Officer:

- Operating Expenses
- Records Centers Revolving Fund (allocated)

Office of the Chief Financial Officer:

- Operating Expenses
- Records Centers Revolving Fund (allocated)
- National Archives Trust Fund (trust fund accounting)

Office of the Chief Human Capital Officer:

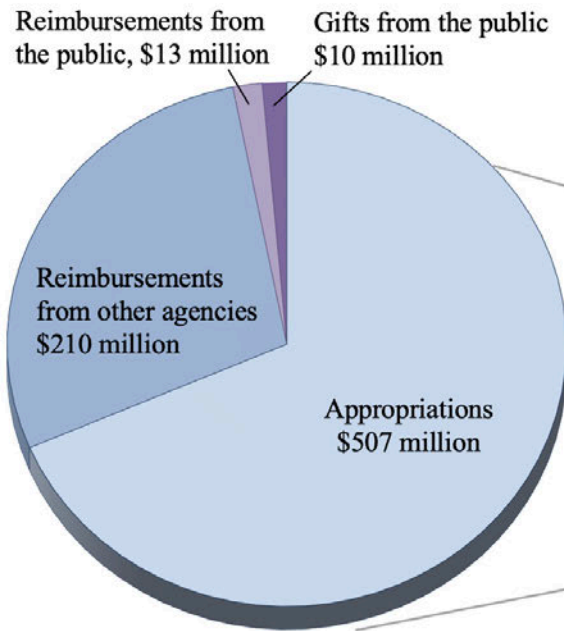
- Operating Expenses
- Records Centers Revolving Fund (allocated)

Information Services:

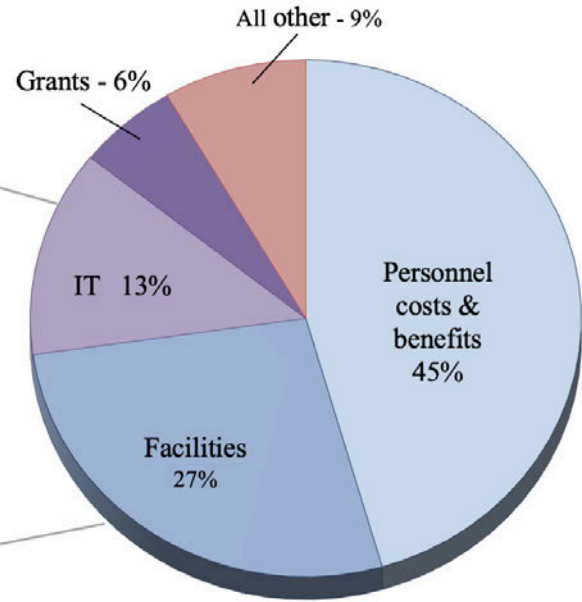
- Operating Expenses
- Records Centers Revolving Fund (allocated)



NARA SOURCES AND USES OF FUNDS



FY 2024 Sources of Funding
\$740 million



FY 2024 Uses of Funds
\$791 million *

* includes carry-over balances from prior-year balances



PRESIDENTIAL TRANSITION 2024–2025

II. Budget Overview



PRESIDENTIAL TRANSITION 2024–2025

NARA Budget

The FY 2025 President’s budget requests \$481 million for NARA’s four discretionary appropriations, providing for NARA Operating Expenses, Office of Inspector General, Repairs and Restoration of NARA-owned buildings, and the National Historical Publications and Records Commission (NHPRC) Grants program. NARA’s FY 2025 request is a reduction of \$26 million from the FY 2024 enacted level.

NARA’s highest priorities for the FY 2025 budget are Presidential Transition, support for the transition to fully electronic recordkeeping, enhance cybersecurity, improve the customer experience with NARA online public services, and additional funding to support the repairs and alterations to the 17 buildings that NARA owns, operates, and maintains.

- *Presidential Transition*—The FY 2025 Continuing Resolution (P.L. 118-83) provides funds to allow the Archivist of the United States to effectively perform the Presidential transition responsibilities assigned to them by the Presidential Records Act (44 U.S.C. § 2201-2207). Funds requested would provide for the secure transportation and the ongoing operations and maintenance costs of storing, processing, and providing access to both electronic and textual records. These funds also provide for additional staff to ensure that NARA can secure electronic Presidential records in the cloud, dedicated staff working closely with the Administration to ensure the smooth transfer of records and support special access requests by Congress and the incoming Administration.
- *Support U.S. Government Transition to Fully Electronic Recordkeeping.* The budget requests \$2.9 million to support the transition to a fully electronic government. This initiative provides 35 new, permanent staff to support robust access to permanent electronic records and digitization in Presidential Libraries.
- *Enhance Cybersecurity.* The budget includes \$7.8 million to improve NARA cybersecurity. Funds requested would begin the implementation of Zero Trust Architecture principles and multi-factor authentication to ensure the security of our systems and the records we protect.
- *Provide Excellent Customer Service to the Nation.* The budget requests \$5.2 million to improve NARA’s digital customer experience, with critical enhancements for [archives.gov](https://www.archives.gov) and the [National Archives Catalog](https://www.archives.gov/national-archives-catalog).

- *Repairs and Restoration.* The budget requests \$13 million to help us address high priority capital and maintenance projects that support the continued preservation of our historical documents and public access to records.

NARA obligated \$791 million in FY 2024, including obligations from NARA's four discretionary appropriations, plus the Records Centers Revolving Fund, a trust fund, and a gift fund. The National Archives Trust and Gift Funds are both mandatory appropriations, funded by proceeds from sales to the public and gifts from the public, respectively.

- NARA Operating Expenses is an annual appropriation that provides for the operation of the federal government's archives and records management activities, the preservation of permanently valuable historical records, and their access and use by the public.
- Office of Inspector General is an annual appropriation that provides for the salaries and expenses of the NARA Office of Inspector General (OIG).
- Repairs and Restoration is a no-year appropriation that provides for the repair, alteration, and improvement of the 17 federal buildings NARA owns, operates, and maintains: the National Archives buildings in Washington, DC, College Park, MD, and Atlanta, GA, and 15 Presidential Libraries and Museums across the United States.
- The National Historical Publications and Records Commission (NHPRC) Grants Program is a no-year appropriation that provides for grants to preserve and publish non-federal records that document American history. NHPRC grants are competitively awarded, matching grants. This appropriation provides for grant awards only: The administrative costs of the program are provided for within NARA Operating Expenses.
- The Records Centers Revolving Fund is a full cost recovery revolving fund that provides for storage and related services for temporary and pre-archival federal records stored at Federal Records Centers. Operations of NARA Federal Records Centers are financed from user charges collected from other agencies; once collected, funds are available for obligation without fiscal year limitation. A portion of NARA common administrative costs are charged to this Fund account, to ensure that costs recovered are the full cost of services provided.
- The National Archives Trust Fund is a revolving trust fund, financed by proceeds from sale of records reproductions, publications, special works, and admissions fees to Presidential Library museums. The Trust Fund invests excess revenues from sales and donations, and uses income earned on investments to support National Archives programs.

- The National Archives Gift Fund is a gift fund that is used to exercise the authority of the Archivist of the United States to solicit and accept both conditional and unconditional gifts. The Gift Fund maintains endowments for selected Presidential Library and Museum facilities, and interest earned is used to offset operating costs for those facilities.



PRESIDENTIAL TRANSITION 2024–2025

III. Strategic Framework



PRESIDENTIAL TRANSITION 2024–2025

Introduction to Strategic Framework

Dr. Colleen J. Shogan is the 11th Archivist of the United States. She was sworn in on May 17, 2023, and is the first woman appointed to lead the National Archives and Records Administration (NARA). As the nation's record keeper, NARA is responsible for preserving, protecting, and sharing the history of the United States.

A noted author and political scientist, Dr. Shogan is deeply committed to civic education and public engagement, and she has made it a priority to expand the reach of the National Archives to a wider audience. Under her leadership, NARA has launched a number of initiatives to enhance services and make its holdings more accessible, both in-person and online, with the goal of cultivating public participation and strengthening our nation's democracy.

The National Archives is a trusted repository of knowledge, and under Dr. Shogan's leadership the agency has reemphasized its commitment to inspiring nonpartisan civic engagement and the discovery of our nation's stories. NARA is exploring new ways to inspire lifelong learning and curiosity through the use of agency holdings and the documentary history of the United States.

With the U.S. government's transition to electronic recordkeeping, Dr. Shogan is also driving a digital renaissance for the National Archives. She has reprioritized resources to invest in improving NARA's outdated IT infrastructure and prioritized preparing for the digital future with new systems and business processes. With that goal in mind, NARA is exploring artificial intelligence and other advanced technologies to enhance preservation efforts, streamline internal processes, and unlock public access to the billions of stories preserved in its holdings. Though under-resourced, NARA is focused on developing novel approaches and innovative solutions to the challenges inherent in managing such a vast collection of records in a wide array of formats. The agency serves all Americans with no agenda or ideology, and the first step to doing so is to ensure that our nation's historical record is accessible and preserved for future generations.

NARA is actively updating the current Strategic Plan to align a new Strategic Framework, included here. The Strategic Framework focuses on NARA's digital transformation, its role in shaping the digital future of the federal government, and strategies to improve access to and raise awareness of the agency's valuable resources for documenting our nation's history and the activities of our democracy. As NARA reconceives the agency mission, vision, and values, the framework emphasizes the importance of good stewardship, the need to create valuable experiences for every user, and the agency's core values to ensure our status as a trusted repository of knowledge: action with honesty, fairness, and objectivity as we improve access to the records at the core of the American experience.



NATIONAL
ARCHIVES

STRATEGIC PLAN FRAMEWORK

MISSION

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

VISION

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

VALUES

We Serve

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

We Inspire

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

We Solve Problems

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

We Are Trusted

We are nonpartisan. We are an authoritative and objective source for knowledge and information. We serve all Americans with honesty, fairness, and integrity.

We Are Efficient

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

STRATEGIC GOALS

I. Build our Digital Future

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

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

II. Transform Access and Engagement

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

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

III. Elevate Service

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

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

IV. Grow our Capacity

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

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



PRESIDENTIAL TRANSITION 2024–2025

IV. Issue Papers



PRESIDENTIAL TRANSITION 2024–2025

NARA's Role in Assisting the White House

NARA provides legal guidance and technical support for managing Presidential records and gifts.

- NARA routinely provides records management guidance to the White House upon request. The Presidential Records Act of 1978 (PRA, 44 U.S.C. § 2201-2209) provides a broad definition of Presidential records (which must be retained and automatically transfer to NARA when the President leaves office) as distinct from personal records, whether private or political (which are the personal property of the President). NARA provides guidance and advice based on institutional knowledge and experience with prior administrations. NARA also has significant expertise in the development and management of electronic records and systems and is prepared to provide guidance to support the development and maintenance of the Executive Office of the President (EOP) systems, including classified systems, in order to ensure their effective transfer to NARA at the end of the Administration, as required by the PRA.
- NARA provides the White House (including on behalf of Executive branch agencies) with access to Presidential and Vice Presidential records of former administrations that are needed for ongoing business of the incumbent President. Records are provided upon request and after the relevant former President has had an opportunity to review the records in order to consider any claims of constitutionally based privileges (44 U.S.C. § 2205(2)(B)). NARA also notifies the incumbent President, through the Counsel to the President, before any Presidential records of past administrations are publicly released (44 U.S.C. § 2208) or provided to the Courts or Congress (44 U.S.C. § 2205(2)(A) and (C)). This notification allows the incumbent an opportunity to review for constitutionally based privileges. NARA provides the same notice and right of review to the former President, and, to the extent appropriate, former Vice President, from whose administration the records came.
- NARA reviews and provides guidance on the disposal of Presidential records of the incumbent President. The Archivist of the United States must provide an opinion in writing before the President may dispose of any incumbent Presidential records (44 U.S.C. § 2203(c)). The PRA establishes a presumption that all Presidential records will be preserved and transferred to NARA for eventual public access; however, certain types of administrative or generic high-volume records may be appropriate for disposal by the incumbent Administration. Past authorized disposals include various records of the

Office of Administration, routine public mail, and automatically generated electronic files.

- NARA provides secure courtesy storage for incumbent Presidential hard copy records and gifts received during the Administration, which are held in secure storage space at the National Archives. All materials remain in the legal custody of the White House until the end of the Administration. Upon request, NARA quickly returns materials to the White House.
- At the end of the Administration, the PRA establishes that all Presidential records automatically transfer to the legal custody of the National Archives. NARA is responsible for physically transferring all Presidential records, gifts, and other historical materials designated for deposit with NARA from the White House at the end of the Administration. In accordance with the Presidential Libraries Act (44 U.S.C. § 2112), NARA supports planning for a future Presidential Library of the President.
- NARA provides exhibit-quality facsimiles of records from the archival holdings of the National Archives to the White House as gifts for visiting heads of state and for gifts the President presents when he is on official visits overseas.
- NARA helps to create and maintain the official Presidential Diary of the incumbent President by providing the Presidential Diarist. The Presidential Diary is a chronological record of the President's movements, phone calls, trips, briefings, meetings, and activities. The Diarist, who works in the White House on detail from NARA, maintains a daily log of Presidential activities and assists the Administration with information requests regarding the official schedule of the President.

NARA supports the White House on the management of federal records and oversight of classified and controlled unclassified information.

- NARA provides guidance and approves records disposition schedules for the Executive Office of the President (EOP) components that create federal records in accordance with the Federal Records Act (FRA). NARA works with the Office of Administration, Office of Management and Budget, United States Trade Representative, Office of Science and Technology Policy, Office of National Drug Control Policy, the Council on Environmental Quality, the Intellectual Property Enforcement Coordinator, the Office of the National Cyber Director, the Office of Pandemic Preparedness and Response Policy and other EOP staff to provide FRA records management guidance, training, and assistance with particularly difficult recordkeeping challenges or issues, and the review and approval of records disposition schedules.
- NARA's Information Security Oversight Office (ISOO) is responsible for providing policy guidance and oversight of the Government-wide classified national security system and the National Industrial Security Program (NISP), and reports annually to the

President on their status, in accordance with Executive Order 13526, “Classified National Security Information,” and Executive Order 12829, “National Industrial Security Program,” as amended.

- ISOO chairs the National Industrial Security Program Policy Advisory Committee.
 - ISOO chairs the State, Local, Tribal, and Private Sector Policy Advisory Committee (SLTPS-PAC), in accordance with Executive Order 13549, “Classified National Security Program for State, Local, Tribal, and Private Sector Entities.”
 - The Director of ISOO serves as the Executive Secretary of the Interagency Security Classification Appeals Panel (ISCAP) and ISOO staff provide all administrative and logistical support. The ISCAP represents the President by serving as the highest appellate authority for challenging the classification of information, and by deciding on appeals of Mandatory Declassification Review requests. It approves, on behalf of the President, agency requests for exemptions to automatic declassification as specified in Executive Order 13526. All ISCAP records are Presidential records and are legally transferred to NARA at the end of the administration along with the records from the White House.
- Through ISOO, NARA serves as the Executive Agent for implementing Executive Order 13556, “Controlled Unclassified Information,” and overseeing agency actions to ensure compliance.
 - NARA and ISOO participate in the Classification, Declassification, and Information Management Interagency Policy Committee meetings held by the National Security Council that are shaping significant reforms to the executive orders that govern national security information. ISOO, with interagency consultation, will issue regulations for the implementation of these new executive orders in the Code of Federal Regulations.

NARA publishes Presidential documents that support the exercise of Executive power.

- NARA publishes the daily *Federal Register*, which is used by the President to publish executive orders, Presidential proclamations, and other official Presidential actions. The *Federal Register* also provides the public with the opportunity to comment on proposed regulatory actions by Executive branch departments and agencies and provides official public notice of effective, final rules. The *Federal Register* is printed every business day and is available online at [FederalRegister.gov](https://www.federalregister.gov). Title 3 of the Code of Federal Regulations is an annual compilation and is available online at [govinfo.gov](https://www.govinfo.gov).
- NARA publishes the *Emergency Federal Register* when authorized by the President. executive orders and Presidential proclamations relating to national security emergencies are required to be published in the *Federal Register* to become legally effective. Federal agencies responding to natural disasters and national security emergencies generally must publish regulatory actions in the *Federal Register* to make them legally enforceable. The *Emergency Federal Register* fulfills these publication requirements during certain

national emergencies.

- NARA publishes the *Daily Compilation of Presidential Documents* on an official website hosted by the Government Publishing Office, which provides public access to all official, legally-noticed Presidential statements and signed papers issued by the White House Press Office. NARA maintains a staff of experienced senior editors who work with other White House offices to obtain additional information necessary for publishing the *Presidential Documents*.
- NARA publishes Slip Laws and the *U.S. Statutes at Large*. The Executive Clerk of the White House delivers to NARA each Act of Congress signed by the President. NARA assigns public law numbers to each Act, publishes a pamphlet version (slip laws), and compiles them in the *U.S. Statutes at Large*.



PRESIDENTIAL TRANSITION 2024–2025

Legislatively Established Records Initiatives

NARA is currently engaged in several legislatively driven initiatives related to federal records, including the John F. Kennedy Assassination Records Collection, Civil Rights Cold Case Records Collection, Unidentified Anomalous Phenomena (UAP) Records Collection, and records related to missing Armed Forces and civilian personnel.

JFK Assassination Records Collection

The [President John F. Kennedy Assassination Records Collection Act of 1992](#) (44 U.S.C. § 2107 note) required the immediate public release, to the greatest possible extent, of all records relating to the assassination of President Kennedy, and further stipulated that any records not immediately released must be released to the public no later than October 26, 2017 (25 years after the statute was enacted), unless the President personally extended the withholding. NARA has physical and legal custody of over five million pages of records, of which approximately 94% are fully accessible to the public, 5.9% are partially accessible, and less than 1% are restricted from public viewing .

Between October 2017 and December 2022, there were several temporary certifications by the President extending the withholding of information. This required agencies to review or re-review all information withheld from full public disclosure to determine whether such information warranted continued postponement and report to the Archivist of the United States the specific information within particular records that met the standard for continued postponement under section 5(g)(2)(D) of the Act: [October 26, 2017](#); [April 26, 2018](#); [October 22, 2021](#), and [December 15, 2022](#). Each agency proposing continued postponement of information beyond December 15, 2022 prepared [an unclassified Transparency Plan](#) which details the event-based or circumstance-based conditions that will trigger the public disclosure of postponed information.

On June 30, 2023, the President issued a final [Memorandum on Certifications Regarding Disclosure of Information in Certain Records Related to the Assassination of President John F. Kennedy](#). As directed in the June 30, 2023 Memorandum, the National Archives' National Declassification Center (NDC) will use the Transparency Plans prepared by agencies to conduct future reviews of any information covered by the Act that has been postponed from public disclosure to ensure that information continues to be disclosed over time as the identified harm associated with release of the information dissipates. The Transparency Plans will ensure that the public will have access to the maximum amount of information while continuing to protect against identifiable harms to the military defense, intelligence operations, law enforcement, and the conduct of foreign relations under the standards of the Act.

The National Archives is also in the process of digitizing the Collection and making it available to the public in the National Archives Catalog.

Civil Rights Cold Case Records Collection

[The Civil Rights Cold Case Records Collection Act \(CRCCA\) of 2018](#) established a four-member Review Board (confirmed by the Senate on February 17, 2022), charged with requesting, reviewing, and proactively releasing records related to civil rights cold cases occurring between 1940 and 1979.

NARA's Office of the Chief Operating Officer and the Research Services Special Projects Team have taken the lead on this project, collaborating with the Board, the Department of Justice (DOJ), and the Federal Bureau of Investigation (FBI) to identify, review, and produce digital surrogates for the Board's review and adjudication.

As of August 2024, NARA has identified, digitized, and reviewed 41,391 pages across 379 files. In response to its periodic production requests, R has delivered over 13,000 pages of records spanning 13 incidents for the Board's consideration. Seizing an opportunity for innovation, NARA has provided unprecedented advance access to these records to the Board. Currently, NARA is reviewing requested material, including high-profile cases such as Martin Luther King Jr., Fred Hampton, Emmett Till, and approximately 70 other incidents.

NARA staff conduct a thorough search of accessioned holdings to identify records relevant to specific incidents, prioritizing digitization of these records once identified. Redactions are then applied based on postponements outlined in the statute, and redacted copies are provided to the Board for review. The Board adjudicates postponements and coordinates with agencies in instances of non-concurrence. Once all postponements have been adjudicated for records in both NARA's custody and records still with stakeholding agencies, final redactions are applied. Lastly, unredacted digital surrogates, redacted copies, justification memos, and necessary metadata will be transferred and accessioned by NARA.

The process of reviewing and releasing this material involves several collaborative stages, including notification to the victim's next of kin and Presidential Certification in instances of nonconcurrence.

Unidentified Anomalous Phenomena (UAP) Records Collection

The [2024 National Defense Authorization Act](#) requires heads of Government offices to identify, organize, and prepare the records for transfer to the National Archives and obligates the agency to establish a special collection that should consist of "copies of all Government, Government-provided, or Government-funded records relating to unidentified anomalous phenomena, technologies of unknown origin, and non-human intelligence (or equivalent subjects by any other name with the specific and sole exclusion of temporarily non-attributed objects), which shall be transmitted to the National Archives in accordance with section 2107 of title 44, United States Code."

NARA has been collaborating with agencies to facilitate UAP records transfers and metadata requirements. Originating agencies are responsible for identifying all UAP records that exist in any format, and creating digital copies of these records. NARA will only accept the digital versions of UAP records.

Publicly releasable copies of UAP records transferred to NARA will be made available online in the National Archives Catalog. NARA will also provide an online finding aid integrated with the Catalog. Agencies will continue to manage the original source records in their custody according to the NARA-approved disposition schedule. Temporary records will eventually be destroyed. Permanent records will eventually be transferred to NARA, even if a copy has already been transmitted as part of the UAP collection.

Missing Armed Forces and Civilian Personnel Related Records

NARA's 2024 appropriation stated that "The agreement provides \$427,250,000 for the operating expenses of the National Archives and Records Administration, of which \$2,000,000 is available until expended to make publicly available the records of missing Armed Forces and civilian personnel."

NARA is undertaking several related efforts to enhance public access to records related to missing in action personnel, including the following:

- transferring relevant permanent records from federal agencies and accessioning them into the custody of the National Archives;
- declassifying series of records that contain information related to missing in action personnel;
- enhancing our online descriptions to improve discoverability of relevant records in our holdings; and
- digitizing relevant records where possible to facilitate public access to these records online from anywhere.



PRESIDENTIAL TRANSITION 2024–2025

Federal Records Management

Modernizing Records Management Practices Across the Federal Government

For well over the last decade, NARA has been leading efforts across the Executive Branch to modernize and transform government by moving towards an electronic government. Most notably, the Office of Management and Budget (OMB) and NARA issued a memorandum (M-23-07) [Update to Transition to Electronic Records](#) with June 30, 2024 deadlines moving federal agencies to a fully electronic environment, where appropriate. The memorandum built upon the efforts by NARA and OMB to modernize the way the federal government creates, uses, manages, and maintains its records in order to improve performance and promotion of openness by better documenting agency decisions and transferring those permanently valuable historical records to NARA.

The deadlines have passed and NARA no longer accepts transfers of paper records unless agencies have approved exceptions or records have documented intrinsic value. Now the work must carry forward. Agencies need clear guidance from NARA to ensure they can manage electronic records effectively and efficiently over time. NARA needs to support new and innovative ways to manage the ever increasing volume and variety of modern records, including automated approaches that relieve the traditional burden on individual federal employees.

Providing Oversight of Federal Records Management Programs

NARA conducts oversight of federal agencies' records management programs to ensure compliance with the Federal Records Act and NARA guidance. Through oversight, NARA issues findings and recommendations to agencies for improving their records management programs and practices. NARA also requires agencies to [submit reports](#) on the state of their records management programs and their compliance with federal regulations.

We have increased our ability to conduct oversight of records management in several ways, including introducing system inspections of electronic records systems, establishing different types and approaches to inspections and assessments, and creating summary products that expand the reach of our findings and recommendations.

NARA's oversight program is responsible for handling all [unauthorized disposition cases](#). We receive notifications from agencies and other sources, such as news media and private citizens. If

NARA hears about allegations of unauthorized disposition from sources other than the agency, we will contact the agency in writing to request that the agency look into the matter and respond to NARA within 30 calendar days. Current regulations require agencies to conduct the investigation and report to NARA. Agencies will work with NARA to resolve the case. NARA establishes unauthorized disposition case files to track each allegation and any communications with the agency until the issue is resolved.

Some of the unauthorized disposition cases can be high-profile and generate attention from the media, special interest groups, public, and Congress. For example, recent high-profile cases have involved the unauthorized disposition of electronic messages among senior officials at CDC and NIH, deleted text messages at Secret Service, and deleted video surveillance at DHS/ICE. In each of these cases, NARA follows its process outlined in [36 CFR part 1230](#) regarding opening, closing, and tracking cases. NARA has also been part of recent litigation around some of these cases. In these types of cases, we will work closely with our general counsel and the agency's counsel and senior leadership to resolve issues.

NARA's challenges in the oversight of records management in agencies have become more complex in recent years due to rapidly changing technology used in the creation of federal records by agencies. For example, NARA oversight is looking at issues related to agency implementation of the Capstone guidance for email and electronic messages, how social media records are managed, and how agencies are digitizing permanent records. In addition, another challenge is a reported lack of support and lack of strategic plans for records management at the senior official and program manager levels at agencies.

NARA is proposing to update the regulations in [36 CFR part 1239](#) to provide clarity and specificity to our agency oversight requirements.

Developing Federal-Wide Record Management Guidance

NARA issues guidance for all record types, media, and formats. NARA has developed a set of [Universal Electronic Records Management Requirements \(UERM\)](#) providing agencies with a clear starting point for contracting or implementing records management solutions or services to meet their business needs. NARA worked with OMB and General Services Administration (GSA) to incorporate the UERM into the [Federal Integrated Business Framework for Electronic Records Management \(FIBF-ERM\)](#), which results in government-wide shared services implementing records management functions.

For years, NARA has worked on [digitization standards](#) for federal records. These standards allow agencies to manage the digitized records and destroy the source records. NARA issued digitization standards for temporary records in 2019, for permanent paper records in 2023, and

standards for permanent film records are forthcoming. NARA provides support and guidance to agencies to implement the standards, including partnering with GSA to help agencies to identify digitization vendors and services.

Providing Records Management Training

NARA provides [training on federal records management](#) in a variety of ways. NARA trains and credentials all federal agency records officers (AROs) through the Agency Records Officer Credential (AROC) program. Topics include basic records management concepts, developing and implementing records management programs, and creating records management policies and procedures.

In addition to the AROC program, NARA provides over 300 records management training products on our website. While our training products are geared towards AROs, they are open to all federal personnel as well as to the general public. We constantly update and create new products to address the ever-changing federal records management environment. Records management training shapes the archives of the future. Without training on how to identify records and send them to the Archives, NARA would have no records to protect for future generations.



PRESIDENTIAL TRANSITION 2024–2025

Declassification

To oversee the declassification review of classified records in its custody, the National Archives and Records Administration (NARA) established the National Declassification Center (NDC) in December 2009. The NDC promotes transparency and accountability through the declassification review and release of historical records that no longer warrant protection. It continues to protect classified national security information by identifying and segregating documents and information that remains sensitive. This work is fundamental to our form of government and the public interest and NARA accomplishes this mission through interagency partnerships and collaboration.

Accomplishments

In its fifteen years of NDC operations, NARA has achieved important results, including:

- Eliminating a 350 million page backlog of records pending declassification.
- Processing approximately 11 million pages per year post-backlog.
- Expanding an interagency document referral center to address declassification review referrals for classified records.
- Developing declassification review workflows, including those for special media formats.
- Producing standardized declassification training and hosted several interagency training events.
- Expanding public access through the Indexing-on-Demand program and publication of quarterly release lists.
- Incorporating the Nixon White House Tapes review project into its workflows in 2019.
- Managing consolidation of classified records from nine Presidential Libraries at the NDC.
- Initiating systematic review and a Mandatory Declassification Review surge of Presidential records.

The interagency partnerships developed by the National Archives are central to the successes of the program and the innovative practices that the NDC team has developed.

Planned, Future Actions and Upcoming Challenges

In 2019, NARA started a process to consolidate classified Presidential records from each of the Presidential Libraries at the National Archives at College Park, Maryland (Archives II) and directed the NDC to expand its declassification operations to include Presidential records. As

part of this effort, the Nixon White House Tapes and the team that processes them at College Park, MD, became part of the NDC.

The consolidation of classified Presidential records paused in March 2020 due to the pandemic and resumed in 2023. To date, NARA has completed the consolidation of all libraries except Nixon, Reagan, and Clinton. There is no timetable for future moves of the three remaining Presidential Libraries at present.

The consolidation of the Presidential records poses challenges for the declassification process due to the expanded volume of records requiring review and the large number of inherited FOIA/Mandatory Declassification Review (MDR) cases associated with these records. There is a high level of interest in these records and the public demand for access. NDC currently does not have the staff to declassify the records to meet the public's expectations for release volume and timeliness.

While the NARA is committed to leading the digital future of declassification, electronic review poses serious challenges. The NDC is using aging IT systems that need updating and replacement. NARA must acquire a new IT system that allows for advanced search, review, and redaction capabilities to advance in the area of electronic review of FOIA/MDR requests for federal and Presidential records and systematic declassification review. This new platform will require substantial funding resources over multiple fiscal years to develop, deploy and maintain/operate. NARA has secured partial funding for this project, but will require further funding to complete this project to replace the aging legacy system before FY 2027. Without funding, NARA will not be able to realize the goal of successfully managing electronic classified records.



PRESIDENTIAL TRANSITION 2024–2025

Freedom of Information Act (FOIA)

Determining public availability for federal records begins when the creating agencies transfer records to NARA's legal custody. Agencies must identify which FOIA exemptions apply to the records during transfer. Based on that information and its own initial spot checking of the records, NARA either makes the records available in full or in part or closes the records until further screening or a FOIA review occurs. Researchers need to file FOIA requests to gain access to closed records, which often require line-by-line review for possible redaction of exempted information.

NARA preserves and provides access to the permanent, historical records of all three branches of the U.S. Government. While the vast majority of the more than 15 billion pages and hundreds of terabytes of archival records are fully open to the public, a sizeable volume contain sensitive information that cannot be released without being reviewed for applicable Freedom of Information Act (FOIA) exemptions – most notably, classified national security information, personal privacy information, and law enforcement information (as a general rule, NARA does not withhold information subject to the deliberative process and other privileges from its federal archival records). The volume of records with sensitive information grows as holdings grow – NARA receives hundreds of millions of pages (or their electronic equivalent) of new federal records every year and the equivalent of a billion-page collection of Presidential records every four or eight years. In the face of an increasing volume of work, NARA has experienced prolonged periods of budget and staff reductions.

As a result, NARA has struggled to keep pace with the increasing volume of FOIA and Special Access requests and provide timely access to records. NARA FOIA professionals regularly manage requests for hundreds of thousands and sometimes millions of pages of records, while also supporting a range of archival functions and large scale projects mandated by Congress in legislation, such as the President John F. Kennedy Assassination Records Collection Act of 1992, the Civil Rights Cold Case Records Collection Act of 2018, and the Unidentified Anomalous Phenomena provisions in the 2024 National Defense Authorization Act. The proliferation of electronic records and a sharp increase in the number of complex and voluminous FOIA and Special Access requests has accelerated the growth of backlogs. As of July 2024, the backlog exceeds 183 million pages at the George W. Bush Presidential Library alone.

FOIA Workflows at NARA

Although FOIA applies only to records of executive branch agencies, NARA protects sensitive information in legislative and judicial branch records, as well as collections subject to donor deeds of gift, in roughly the same manner. The Presidential Records Act (PRA), which applies to

all Presidential records beginning with President Reagan, incorporates most, but not all, of the FOIA exemptions along with six restrictive categories.

Due to practical and legal differences in the way that FOIA applies to different parts of the agency, NARA has a decentralized FOIA program roughly divided among three archival program offices¹:

- Research Services, which focuses principally on unclassified federal records;
- the National Declassification Center, which focuses on classified federal and Presidential records; and
- the Office of Presidential Libraries, which oversees the Presidential Libraries subject to the Presidential Records Act (PRA) and therefore the access provisions of the PRA and FOIA.

Responding to FOIA requests is essentially the last stage of the life cycle for providing access to permanent archival records.

Records in the Presidential Libraries from Reagan forward are closed in full on receipt and only subject to FOIA beginning five years after the end of the administration. Because of the nature of Presidential records, the terms of the PRA, and the fact that the White House does not identify applicable FOIA exemptions before transferring its records to NARA, virtually all Presidential records must undergo a line-by-line review prior to release.

FOIA Responses

The ability to complete FOIA requests within the statutory 20 working days depends on the size and complexity of each request – i.e., how long it takes to locate the requested volume of potentially responsive records, determine which of them are actually responsive, and then review them for applicable FOIA exemptions. Although responding to FOIA requests is still largely a manual process involving skilled FOIA professionals, each of these steps has the potential to be made more efficient, particularly if they can be automated, but only to a degree.

For example, searching for textual records within a universe of, for example, 50 million pages in multiple stack locations is significantly slower than searching an electronic database, but digitizing records to be able to search them electronically introduces other problems. The volume of potentially responsive records and false positives that are returned on electronic searches - such as a search of 220 million to 300 million emails, which is the volume in the George W. Bush and Obama Presidential Libraries' collections, respectively - can be staggering and require a large investment of time to determine responsiveness. Born-digital records pose their own set of challenges from format to volume.

NARA is addressing the challenges in several ways, including:

¹ NARA's Operational FOIA Division, located in the Office of General Counsel, responds to FOIA requests for NARA's own agency records.

- Working with requesters to narrow the scope of their requests;
- Testing technology with the potential to improve processing efficiency such as email threading, deduplication, and auto redaction, to identify requirements for tools to procure in the future;
- Drafting high level requirements for an access review and redaction system for Electronic Records Archives (ERA) 2.0 and pursued a request for information to explore available market solutions that provide FOIA tracking, eDiscovery, search, review and redaction capabilities using the latest technologies available for potential automation, including artificial intelligence;
- Increasing the number of FOIA professionals.

Planned Future Actions

NARA's mission is to preserve and share the historical records of the U.S. government and an essential component of the agency's work is to digitize traditional (analog) holdings and make them available to the public online. But even as more archival records are digitized, many of them will still have to be reviewed for applicable FOIA exemptions. Accordingly, NARA must make significant investments in the technology, processes, and staffing necessary to digitize and provide access to all of its records in a timely manner, to include:

- Accelerated development of NARA's ERA 2.0 system, to include state of the art artificial intelligence/eDiscovery search, review, and redaction tools that can be accessed remotely.
- Significant increases in archival staff to conduct and oversee FOIA review in order to ensure that NARA can release as much information as possible while continuing to protect classified, privacy, law enforcement, and other highly sensitive information.



PRESIDENTIAL TRANSITION 2024–2025

Preparing for a Digital Future

The greatest challenge facing the National Archives is the necessary transition of the agency from a predominantly paper-based organization to an electronic-based archives.

NARA holds over 13.5 billion analog records and has developed an extensive infrastructure dedicated to properly preserving, protecting, and sharing those documents. However, with [*OMB Memorandum M-19-21, Transition to Electronic Records*](#), the federal government has transitioned to electronic record keeping and NARA must develop the capabilities necessary to accession, manage, and share the exponentially increasing volume and variety of electronic records being created across the U.S. government.

While maintaining support for the historically valuable analog records, NARA must also develop a modern digital ecosystem capable of reliably verifying, processing, preserving and providing public access to these important records at a scale only replicated by the largest technology companies. NARA is not currently resourced to meet these requirements. The agency has accumulated massive technical debt and requires a substantive infusion of investment in information technology to meet the requirements of our mission as we move further into the digital age.

NARA currently hosts just under one petabyte of electronic records, with limited capacity to manage and share them. With a shift to all digital transfers, we expect the volume of electronic records transferred for permanent retention to increase significantly in the very near term. For example, in the 2024 *Records Management Self-Assessment*, NARA asked federal agencies to provide an estimate of the volume of large data sets they *currently* hold that are due to be transferred as permanent records. Only 6% of the responding agencies were prepared to provide this information. However, that small set of respondents reported an accumulation of over 40 petabytes of data due to be transferred to NARA. Given the low number of respondents, that volume significantly underrepresents the government-wide total. Anecdotally, NASA's earth science archive alone has been reported to hold over 40 petabytes of data.

NARA is not currently equipped to store, preserve, or provide access to this volume of electronic records and will be unable to meet the agency mission without a major expansion of our digital storage capacity. NARA also expects that agencies using records management applications to store their permanent records will want to send transfers from their agency systems, more often in cloud-based infrastructures, directly to NARA's records archiving systems. While NARA has made significant strides in developing mechanisms for cloud-to-cloud transfer, they are not sufficiently robust to manage the expected increase in volume and diversity of formats.

Accessioning and Preservation

NARA's primary solution to address the need for greater capacity and infrastructure for receiving and managing electronic records was the development of ERA 2.0, the latest generation system of the long-standing [Electronic Records Archives](#) program. Launched in 2018 for NARA staff use, and in 2023 for federal agency use, ERA 2.0 features a cloud-based approach with access to scalable storage and processing capabilities that allow NARA to process and manage its ever-growing body of electronic holdings. Hosting ERA 2.0 in the cloud also provides a means to help "future-proof" the system against technical obsolescence of the infrastructure (both computing and storage resources) on which the system is built.

However, development of ERA 2.0 has been handicapped by limited funding, and the system lacks several key features to ensure that NARA is able to meet the agency's mission to preserve and provide access to records in the long term. NARA must be resourced to incorporate new tools to verify, describe, search, review, and redact records within the system. Those steps are critical for NARA to be able to process, preserve, and make accessible the massively increasing body of electronic records in its holdings. These improvements would also allow NARA to retire outdated legacy systems, which are increasingly risky and expensive to maintain and use.

Access

NARA must also dramatically improve the ways we make accessible permanently valuable digital records. The nature of federal records management and archival administration is evolving as technology advances. NARA must prepare for a digital future, not only in terms of accessioning ever-increasing volumes of electronic records, but also with a focus on improving digital access to analog records and to museum and educational experiences.

The National Archives Catalog is currently the central portal that provides online customers with critical access to NARA's vast collection of digital holdings. It stands as a key resource for researchers, historians, educators, students, journalists, lawyers, government workers, and the general public. These audiences expect a world-class digital experience and seamless access to digital records.

NARA projects digital records in the Catalog will grow from 300 million digital records to 500 million digital records by the end of FY 2026 and 1 billion digital records by 2031. NARA's [Strategy for Digitizing Archival Materials for Public Access, 2015–2024](#) addresses the scope, objectives, and approaches to digitizing records and making more of the agency's holdings available online. NARA is currently evaluating the existing infrastructure and determining the necessary enhancements to support the exceptional growth in electronic records.

NARA must also continue to evolve its technical approach for records access. As increasingly large volumes of records are added to the Catalog, navigating the platform to produce meaningful results becomes challenging. NARA is exploring ways to scale its IT infrastructure, cloud storage, and advanced tools, like artificial intelligence, to enhance user experience and continue to support operations beyond 1 billion digital objects, but funding will be required to

realize this vision. Without improved capabilities for search and discovery in the National Archives Catalog, NARA will fail to meet the agency mission of providing access to federal records to the public in any meaningful way.



PRESIDENTIAL TRANSITION 2024–2025

Budget Challenges

The greater part of NARA's budget is the fixed costs of payroll, facilities, and information technology contracts. Maintaining a portfolio of buildings, information technology infrastructure, and staff necessary to preserve and provide public access to over 13 billion pages of analog (or paper) records is a struggle for NARA. NARA is working diligently to identify ways to maintain our core mission and functions as well as modernize our technology systems to improve efficiency and effectiveness. NARA has already taken steps to ensure the efficient use of NARA's limited resources through the closure of several National Archives locations. These facility closures and consolidations will provide limited savings in FY 2025.

The Office of Management and Budget (OMB) and NARA jointly released a memorandum, [OMB/NARA M-23-07, Update to Transition to Electronic Records](#). This memo extends the original December 31, 2022, deadline given in [M-19-21, Transition to Electronic Records](#) to June 30, 2024. No later than June 30, 2024, all permanent records in federal agencies must be managed electronically to the fullest extent possible for eventual transfer and accessioning by NARA. NARA is not prepared to receive, process, preserve, and provide public access to the extraordinary volumes of electronic records that will soon be transferred to NARA from the originating agencies.

Based on the results of the recent "Records Management Self Assessment," NARA estimates agencies have accumulated a minimum of 40 petabytes (PB) of permanently valuable emails and modern electronic records, and the true total likely far exceeds that number. By FY 2031, we expect agencies to begin transferring as much as one PB of new, permanently valuable electronic archival records *each year*. Today, NARA holds just 1,298 TB (1.27 PB) of electronic and digitized archival records in a wide range of formats and storage media. Most of these records are not readily available to the public because they have not been reviewed for sensitive content, are stored on portable storage media outside of preservation systems, or were created and stored in obsolete formats.

NARA does not have the staff, tools, or infrastructure necessary to search, store, and preserve the historical electronic records that are already in our custody. If NARA cannot build the necessary, secure infrastructure to capture and preserve records, there is no alternative or back-up plan to ensure that the federal government will not lose these records permanently due to format obsolescence.

In addition to preparing for the influx of electronic records, NARA is unable to adequately process, preserve, and provide public access to the analog records already in our custody. Future transfers of analog records are also at risk. NARA has a \$318 million deferred maintenance backlog for its 17 owned federal buildings. In addition, there is also at least \$18 million in necessary end-of-life IT network equipment and cybersecurity improvements. This frequently creates challenges in maintaining operations and jeopardizes the security of our systems and the records we protect.

NARA has identified several investments to help us address our large and growing technical debt. These investments will begin to build our digital future, transform access and engagement with our records, provide critical repairs and maintenance of NARA-owned facilities and information technology infrastructure, and support a new executive order to modernize and transform the government-wide program for national security information. These investments are essential to maintain our current operations and to ensure that we have the foundation to prepare for the next generation of information systems to store, reference, and provide public access to the electronic records that agencies will soon begin transferring to NARA.

- ***Begin preparing for NARA's digital future and the pending wave of federal electronic records, \$9.1 million and 1 FTE.*** NARA has no means to make the necessary investments to prepare to capture, preserve, and provide public access to the extraordinary volumes of electronic records that we expect to receive in just seven years. Artificial intelligence (AI) and machine learning are the only ways that NARA can keep pace with the incoming wave of electronic records that will soon be transferred to the National Archives. NARA must integrate AI, machine learning, and robotic process automation to enhance data management, review, and access to records. This investment provides initial funding to begin implementing AI to improve productivity as well as semantic search and discovery. Semantic search uses AI technology to understand the intent behind user queries and surfaces relevant results from unstructured data sources. This investment would also provide for a Chief Digital Officer to develop a roadmap for NARA's digital future that will include a framework for future requirements and investments.
- ***Preparation for Semisecular, \$3.9 million and 30 FTE.*** NARA anticipates a drastic increase in visitor attendance in 2025 and 2026 as tourism levels rise due to the 250th anniversary of the Declaration of Independence. NARA is not equipped to meet the expected increase in visitor attendance or provide meaningful opportunities for engagement nationwide around these events. This investment would provide critical support to expand digital engagement and onsite visitation support and to bolster civic education programming for our Nation's 250th birthday. This includes security and

facilities costs to support extended visitor hours in Washington, DC and across our other public facilities to support the national America250 celebration as well as an expansion of virtual engagement and digital program delivery. This investment would also provide 30 new federal employees that will directly support visitor services and public education programs across NARA.

- ***Provide critical repairs and maintenance of NARA-owned facilities, \$49 million.***

NARA has accumulated a deferred maintenance backlog of \$318 million for NARA's 17 owned facilities. Critical investments have been delayed or deferred due to funding limitations yet are necessary to continue basic operations.

- National Archives building at College Park, MD, \$16 million. The majority of NARA's deferred maintenance backlog is for the 30-year-old National Archives at College Park, MD. Many building systems are beyond their life expectancy, in an advanced state of deterioration, and need to be replaced. The cooling tower, water pumps, and chillers are end-of-life and have begun to fail. This equipment is critical to maintaining constant temperature and humidity levels in storage areas to preserve paper (or analog) records. Replacement of equipment in the mechanical plant at the National Archives at College Park, MD would also be addressed. This new system would allow for increased efficiency and energy savings and allow for stricter control of environmental conditions in the stacks where records are preserved. This investment would also provide funding to begin to systematically repair the physical infrastructure and equipment. Necessary improvements include roof replacement, upgrades to elevators, and the replacement of boilers.

- New Archival Storage, \$28 million. NARA received funding in FY 2020 for the design and renovation of space and related improvements to the National Archives facility in College Park, MD. This included converting existing space into dedicated mass digitization space, modernized special media labs, new cold storage space, and a new storage area for archival records. This project was delayed due to the COVID-19 pandemic and costs have increased substantially since the original estimate. NARA's new mass digitization space opened in FY 2024; however, NARA is unable to complete the entire project due to increased costs. This investment would provide the necessary funding to provide an additional 75,000 cubic feet of needed archival storage. NARA currently holds over 13 billion pages of archival federal records. NARA anticipates that an additional 4.2 billion pages of permanently valuable, historical records will be transferred to NARA over the next 15 years. This requires a significant expansion of records storage space.

- Security System Replacement, \$5 million. This investment provides critical repairs to NARA's flagship facility, where the Declaration of Independence, the U.S. Constitution, and the Bill of Rights are on permanent display so that all Americans can view our Nation's founding documents. Unfortunately, these irreplaceable documents and millions of pages of other, permanently valuable historical records are placed at risk due to technical obsolescence of building equipment there. The National Archives Building's closed-circuit television system (CCTV) that NARA uses to monitor public spaces has reached its maximum capacity and is past end-of-life. NARA cannot meet its physical security needs with the currently deployed system and must acquire a new CCTV system in order to appropriately protect our records, staff, and visitors in our museum exhibit and public research room. This investment also provides for the replacement of the security systems at the Harry S. Truman Presidential Library in Independence, MO, John F. Kennedy Presidential Library and Museum in Boston, MA, George Bush Presidential Library and Museum in College Station, TX, and the George W. Bush Presidential Library in Dallas, TX. These systems are no longer supported and must be replaced to ensure the safety of our staff and visitors.
- ***Improve NARA cybersecurity and provide critical repairs to NARA's aging information technology infrastructure, \$18 million and 3 FTE.***

NARA has identified over \$18 million in critical investments in IT infrastructure necessary to maintain operations and to implement [Executive Order 14028, Improving the Nation's Cybersecurity](#). NARA requires substantial improvements in the reliability and bandwidth of our network in order to digitize analog archival records, manage growing born-digital records, and make them all available to the public online. This investment would provide necessary resources, including three new, permanent federal employees to continue the implementation of NARA's Zero Trust Architecture (ZTA) and improve IT security services with the Department of Justice's Security Operations Center (SOC) as a Service.

This investment would provide for the replacement of current end of life equipment to avoid potential future system failures, improve the overall user experience, and reduce potential system vulnerabilities while making infrastructure more resilient to interruptions of service. This includes necessary network and bandwidth upgrades, data center and network port security management.

- ***Modernize NARA processes for declassification and responding to Freedom in Information Act (FOIA) requests, \$7 million and 13 FTE.***

The Biden Administration expects to issue a new executive order to modernize and transform the government-wide program for national security information . This executive order includes considerable new responsibilities for NARA that require funding and that are pivotal to the success of the Administration's efforts. This includes a new National Director for Controlled and Classified Information (DCCI) and three related support staff. Funding would also provide a comprehensive declassification system to improve document review, accountability, and workflow coordination for both paper and electronic records. Without additional funding to support a new DCCI and related support staff, NARA will not be able to fulfill this requirement.

This investment would also increase the speed and efficiency of NARA responses to FOIA requests. NARA is facing an unprecedented challenge in responding to FOIA requests for access to archival records in our custody. NARA typically requires 30 months to respond to a simple FOIA request, and a complex FOIA request can take up to seven years. The George W. Bush Library currently has a FOIA backlog of 5.5 million pages of textual (or paper) records, 35.1 million electronic files, and 2.7 million photos and the Barack Obama Library currently has a FOIA backlog of 3.5 million pages of textual records, 29.5 million electronic files, and 5.1 million photos. Funding would support a FOIA business process reengineering study and nine, new permanent federal employees to identify opportunities to expedite FOIA processing and responses.



PRESIDENTIAL TRANSITION 2024–2025

V. Congressional Affairs



PRESIDENTIAL TRANSITION 2024–2025

Office of Congressional Affairs

The Congressional Affairs Office (NCON) is responsible for increasing and maintaining support for NARA and its actions in Congress. This includes increasing tours for Members of Congress of NARA facilities, but also increasing NARA's visibility on Capitol Hill by displaying historic documents on Capitol Hill, ensuring the Archivist has communication channels with Members, and also serving as authoritative experts in areas such as federal and Presidential records management, classification and declassification of records, FOIA, and Privacy Act issues.

NARA's relations with Congress involve close relationships with its House and Senate Committees of primary jurisdiction for oversight, authorizations and appropriations. NARA holds more than 500,000 cubic feet of House and Senate records and provides public access to those records. NARA also assists individual Member offices by annually responding to over 15,000 congressional casework requests.

NARA's Congressional Affairs office tracks over 200 bills each Congress, from general government bills to bills which specifically mention NARA. Examples include tracking the National Defense Authorization Act for sections that affect declassification rules, which affect such NARA offices as ISOO, NDC, and PIDB, as well as sections providing new medals and other benefits for veterans, which affect the National Personnel Records Center. There have also been bills that direct NARA to be the clearinghouse for records pertaining to UAPs, MIAs, and Civil Rights cold cases.

The Congressional Affairs Office provides NARA's views on pending legislation and other Congressional issues to the Office of Management and Budget for the formulation of administration-wide views on legislative issues.

Congress and NARA's Budget

The Congressional Affairs Office works closely with NARA's appropriations committees after the President's budget is released to explain our budget request and answer specific questions about our funding needs and spending priorities.

NARA's Committees of Jurisdiction for Authorization and Oversight:

House Committee on Oversight and Accountability

Senate Committee on Homeland Security and Governmental Affairs

NARA Committees of Jurisdiction for Annual Appropriations:

House and Senate Appropriations Committee, Subcommittees on Financial Services and General Government

Other Committees With Which NARA Works Closely:

Senate Select Committee on Intelligence

House Permanent Select Committee on Intelligence

Senate Committee on the Judiciary

House and Senate Committees on Veterans Affairs

Issues of Congressional Interest Requiring NARA Consultation:

Reforming the Classification/Declassification process

Reforms of the FRA and PRA

Compliance with the PRA and FRA

Special Access Requests

Services to Veterans



VI. Potential Briefing Topics



PRESIDENTIAL TRANSITION 2024–2025

Potential Briefings on NARA Programs and Initiatives

We are prepared to schedule any of the topical briefings listed below as well as briefings on any specific office (see organization charts) at the request of the Agency Review Team (ART). ART members should contact (b) (6) ((b) (6) @nara.gov, (b) (6)) to schedule briefings.

Assistance with the [Presidential Records Act](#)

Assistance with Presidential Gifts

[Presidential Library System](#)

Service to Veterans and their Families – [National Personnel Records Center](#)

The [Federal Register](#) and the [Code of Federal Regulations](#)

Daily Compilation of Presidential Documents and the [Public Papers of the President](#)

[National Historical Publications & Records Commission](#)

[Federal Records Centers](#) – Storage and Services Provided to Departments and Agencies

NARA's Real Property Portfolio

IT Security Challenges – High Value Assets

NARA's [Budget](#)

Human Capital Overview and [Federal Employee Viewpoint Survey Results](#)

Audits and Investigations Conducted by the [Office of the Inspector General](#)

Briefings with Tour Opportunities

[National Archives Museum](#)

NARA's "Treasure Vaults"

[Support Provided to Researchers](#)

[The Washington National Records Center](#)

[Preservation and Conservation at NARA](#)

[Archives II Digitization Center](#)



VII. Background on Senior Leaders



PRESIDENTIAL TRANSITION 2024–2025

NARA Senior Leaders (Management Team)



Archivist of the United States

Dr. Colleen Shogan

archivistoftheunitedstates@nara.gov

Dr. Colleen J. Shogan is the 11th Archivist of the United States. She was sworn in on May 17, 2023, and is the first woman appointed to lead the National Archives and Records Administration (NARA).

As the nation's record keeper, Dr. Shogan is responsible for preserving, protecting, and sharing the history of the United States. A noted author and political scientist, Dr. Shogan is deeply committed to civic education and public engagement, and she has made it a priority to expand the reach of the National Archives to a wider audience. Under her leadership, NARA has launched a number of initiatives to enhance services and make its holdings more accessible, both in-person and online, with the goal of cultivating public participation and strengthening our nation's democracy.

With the U.S. government's transition to electronic record keeping, Dr. Shogan is also driving a digital renaissance for the National Archives. NARA is leveraging artificial intelligence and other advanced technology to enhance preservation efforts, streamline internal processes, and unlock public access to the billions of stories preserved in its holdings.

Prior to becoming Archivist, Dr. Shogan served in a number of cultural heritage leadership roles. Most recently, she was Senior Vice President and Director of the David M. Rubenstein Center at the White House Historical Association. She also worked in the United States Senate and as a senior executive at the Library of Congress and its Congressional Research Service.

Dr. Shogan served as the Vice Chair of the Women's Suffrage Centennial Commission and the Chair of the Board of Directors at the Women's Suffrage National Monument Foundation. She taught at Georgetown and George Mason University. She has also moderated seminars for the Aspen Institute. She is the previous President of the National Capital Area Political Science Association and served on the American Political Science Association Council, the governing body of the organization. In 2024, Dr. Shogan received the Hubert H. Humphrey Award from the American Political Science Association, honoring her public service.

A native of the Pittsburgh area, Dr. Shogan holds a bachelor of arts in political science from Boston College and a doctorate degree in American politics from Yale University, where she was a National Science Foundation Graduate Fellow. Her research focuses on the American Presidency, presidential rhetoric, women in politics, and Congress. She is a member of Phi Beta Kappa, the Order of the Cross and Crown, and the Washington, D.C. Literary Society.



Deputy Archivist of the United States

William J. Bosanko

william.bosanko@nara.gov

William J. Bosanko was appointed Deputy Archivist of the United States on December 1, 2023. He has been a member of the Senior Executive Service at NARA since 2008. From January of 2013 through November 2023 he served as NARA's Chief Operating Officer, responsible for all facets of NARA's archival mission. From 2011 to 2013 he served as NARA's Executive for Agency Services and was responsible for NARA's efforts nationwide to service the ongoing records management needs of federal agencies and to represent the public's interest in government records with regard to accountability and transparency. Mr. Bosanko previously served as the Director of the Information Security Oversight Office from 2008 to 2011 where he was responsible for oversight of the government-wide security classification system, the controlled unclassified information system, and the National Industrial Security Program. Mr. Bosanko began his career with NARA in 1993, first as an archives technician and later as an archivist and a management and program analyst. He holds a bachelor of arts in political science from Susquehanna University (Selinsgrove, Pennsylvania).



Chief of Staff

Monica Woods

monica.woods@nara.gov

Monica Woods was appointed as NARA's Chief of Staff in March 2024. In this role, Ms. Woods leads a diverse and broad portfolio focused on organizational optimization, collaborative engagements and partnerships, innovative programming, and impactful communications and outreach. Prior to joining NARA, Ms. Woods worked in the nonprofit sector. She was Executive Vice President and Chief Operating Officer of The Leadership Conference on Civil and Human Rights and The Leadership Conference Education Fund, collectively referred to as The Leadership Conference. Before The Leadership Conference, Ms. Woods was Chief Administrative Officer and Vice President of Human Resources at the Urban Institute. At The Leadership Conference and Urban Institute, Ms. Woods led capacity building, organizational transformation, and change management initiatives.

Prior to working in the nonprofit space, Ms. Woods spent several years as a federal employee with the Departments of Education and Homeland Security and the Library of Congress fostering organizational development, performance, and culture.

Ms. Woods holds a bachelor of arts in political science from Spelman College and a master's of public administration from American University.



Chief Operating Officer

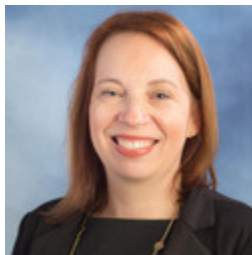
Jay Trainer

jay.trainer@nara.gov

Jay Trainer was appointed as NARA's Chief Operating Officer (COO), effective December 1, 2024, where he is responsible for all facets of NARA's archival mission.

Jay served as the Acting COO for the National Archives and Records Administration (NARA) since December 2023. He has also been NARA's Executive for Agency Services and a member of the Senior Executive Service since 2013, and is responsible for NARA's efforts nationwide to service the ongoing records management needs of federal agencies and to represent the public's interest in government records with regard to accountability and transparency. Jay joined NARA in 1988 as a student trainee and progressively held management analyst, financial analyst, and leadership positions supporting agency operations.

Jay holds a bachelor of arts in history from the University of Dayton and a master's in American history from George Mason University.



Acting Chief of Management and Administration

Colleen Murphy

colleen.murphy@nara.gov

Colleen Murphy was appointed as NARA's Chief Financial Officer in October 2016. As CFO, she is the principal adviser to the Archivist on federal financial management and provides enterprise wide leadership for budget, accounting policy and operations, financial reporting, and operation of NARA's Trust and Gift Funds. From 2010 to 2016, Ms. Murphy served as NARA's Accounting Officer. She has bachelor degrees from the University of Maryland in accounting and government and politics.

**Chief Innovation Officer**

Pamela Wright

pamela.wright@nara.gov

Pamela Wright became NARA's first Chief Innovation Officer in December 2012. She leads staff responsible for agency-wide projects and programs in the following areas: innovation, digitization, web, social media, online description, and online public engagement. Ms. Wright previously served as the agency's Chief Digital Access Strategist (2009–2011), where she pulled together the web, social media, and online catalog staff into an award-winning integrated team for improved online public access, and as the manager of the Archival Research Catalog (2005–2008), where she led staff responsible for developing and implementing policies, processes, systems and standards relating to the description of records. She served as the agency representative to the White House Open Government Working Group from 2010-2017 and serves on advisory boards for the Digital Public Library of America and Library and Archives Canada.

Ms. Wright began her work at the National Archives as an archivist in the Initial Processing and Declassification unit in 2001 and holds undergraduate degrees in history and English from the University of Montana, as well as a graduate certificate in project management from the George Washington University. Prior to her work at the Archives, Ms. Wright was a staff historian for a private consulting firm, conducting research at local, state and federal facilities across the country.

**Acting General Counsel**

Hannah Bergman

Hannah.Bergman@nara.gov

Hannah Bergman joined NARA in 2009, serving in a variety of roles in the Office of General Counsel, including most recently as the Director of Litigation. Principally, she provides advice on the Federal Records Act, Presidential Records Act and the Freedom of Information. She has received numerous Archivist's Achievement Awards for her work at NARA, including her contributions to the Capstone Approach to Email Management. Before coming to NARA, Hannah worked for the Reporters Committee for Freedom of the Press as the Jack Nelson Freedom of Information fellow, and was a newspaper reporter. Hannah holds a JD and Master's in Communication from American University in Washington, D.C., and a Bachelor of Journalism degree from the University of Missouri-Columbia.

**Director, Office of Federal Register**

Oliver Potts

oliver.potts@nara.gov

Oliver Potts was appointed as NARA's Director of the Federal Register in August 2015. As Director, he is responsible for publication of the official text of federal laws, Presidential documents, and regulations. He previously served as Deputy Executive Secretary at the Department of Health and Human Services, where he also served in legal counsel positions. Mr. Potts holds a bachelor of arts in government and politics from George Mason University and a Juris Doctor from the University of Connecticut School of Law.

**Executive for Agency Services**

Jay Trainer

jay.trainer@nara.gov

Jay Trainer was appointed as NARA's Chief Operating Officer (COO), effective December 1, 2024, where he is responsible for all facets of NARA's archival mission.

Jay served as the Acting COO for the National Archives and Records Administration (NARA) since December 2023. He has also been NARA's Executive for Agency Services and a member of the Senior Executive Service since 2013, and is responsible for NARA's efforts nationwide to service the ongoing records management needs of federal agencies and to represent the public's interest in government records with regard to accountability and transparency. Jay joined NARA in 1988 as a student trainee and progressively held management analyst, financial analyst, and leadership positions supporting agency operations.

Jay holds a bachelor of arts in history from the University of Dayton and a master's in American history from George Mason University.



Executive for Research Services

Chris Naylor

chris.naylor@nara.gov

Chris Naylor was appointed as Executive for Research Services in April 2022. In this role, he leads Research Services staff across the country, who provide world class services to researchers and members of the public.

Research Services staff facilitate access to the permanent records of federal agencies and courts at the National Archives, and preserve archival holdings for the benefit of future generations. Mr. Naylor is responsible for Research Services' primary mission of accessioning, processing, describing, preserving, and providing access to the permanently valuable federal records held by the National Archives and Records Administration.

Mr. Naylor brings over 20 years of federal government service to this position. He began his career at NARA in May 2000 as an archives technician and has worked in a number of archival and management positions, including Chief of Textual Processing and Director of the Textual Records Division in Research Services. He served as NARA's Deputy Chief Operating Officer for five years, helping coordinate agency operational responsibilities nationwide in support of NARA's strategic goals. He was appointed Deputy for Archival Operations in Research Services in July 2021 and served as the Acting Executive for Research Services between November 2021 and April 2022.

Mr. Naylor holds bachelor of arts degrees in history and German, and a masters of public policy from the University of Maryland, College Park.



Executive for Presidential Libraries

Kara Blond

kara.blond@nara.gov

As Executive for Presidential Libraries, Kara Blond oversees the 15 archival repositories and museums administered by NARA across the country that promote understanding of the American experience, preserve and provide access to historical materials, and create interactive programs and exhibitions. She also oversees the Office of Presidential Libraries' White House Liaison Division, Archival Operations Division and Public Engagement Division.

Before coming to NARA, Ms. Blond served as Executive Director of the Capital Jewish Museum from 2017 to 2022, where she led the effort to envision, plan, fund and build a new museum in the nation's capital. Previously, Ms. Blond was Director of Exhibitions at the Smithsonian's

National Museum of Natural History, where she provided strategic direction for the exhibitions and public engagement program and managed key national partnerships. Earlier, Ms. Blond oversaw exhibition development at the Smithsonian's National Zoological Park. Ms. Blond received a master's degree in Education: Learning, Design and Technology from Stanford University and a bachelor's degree from the University of Pennsylvania.



Executive for Public Museum Engagement and Legislative Archives

Susan Donius

susan.donius@nara.gov

Susan Donius serves as the Executive for Public Museum Engagement and Legislative Archives at the National Archives. In this role, she is also responsible for the museum and education programs for the National Archives in Washington, DC, Kansas City, and New York City, as well as the archival and outreach components of the Center for Legislative Archives. In her role, she coordinates strategic partnerships with national organizations to expand access to NARA's holdings.

From 2012 to 2020, Ms. Donius served as the Director of the Office of Presidential Libraries coordinating programs and operations among the libraries, including the establishment of new Presidential Libraries. Ms. Donius played an integral role in the establishment of the William J. Clinton, Richard Nixon, and George W. Bush Presidential Libraries. She consults internationally on the Presidential Library System and the establishment of new Presidential Libraries.

Ms. Donius began her career as an Archives Technician at the National Personnel Records Center in St. Louis, Missouri. She has also worked as a Management Analyst and Budget Analyst in the Office of Regional Records Services and the Office of the Federal Records Centers Program. Ms. Donius holds a bachelor's degree in Industrial and Organizational Psychology and Business Economics from Southern Illinois University and a master's degree in Information Management from Syracuse University.



Acting Chief Records Officer

William Fischer

william.fischer@nara.gov

William Fischer was appointed Director of the National Declassification Center in February 2019. Prior to this appointment, Mr. Fischer served in a number of records and information management positions at the Department of State, including Agency Records Officer, Chief of Declassification, and Deputy Director of the Office of Information Programs and Services. Prior to joining the Department of State in 2008, he served in a variety of archival roles at NARA from 1998 to 2008.

Mr. Fischer holds a bachelor of arts degree in history from the University of Montana, a master of arts in history from Montana State University, and a doctorate degree in history from The Catholic University of America.



Acting Chief Information Officer

Gulam Shakir

gulam.shakir@nara.gov

Gulam is NARA's Acting Chief Information Officer, since Dec 2024. Previously, Gulam was NARA's Chief Technology Officer from 2020. In his CTO role, Gulam established agency-wide enterprise technology architectures and provided program level IT strategic direction to mission critical programs.

Some of Gulam's recent achievements include exploring options for the transfer of electronic records from various cloud sources, providing secure access to partners in external agencies, migration of legacy applications to the cloud, and advising on the modernization of legacy applications that process requests to veteran's records

Currently, As NARA's Chief AI Officer, Gulam is leading a few AI related pilots to improve search within the National Archives Catalog, to detect Personally identifiable information (PII) within NARA records before releasing it to the public, and to create AI-assisted first draft of descriptive metadata for NARA's records.

In the past, Gulam has served as NARA's Chief Data Officer and as a System Architect within Information Services since 2016. Before joining NARA, Gulam served in various technical leadership roles at DataXu, Inc., Marchex, Inc., and IBM Corporation. He has a master's degree in computer science from West Virginia University.



Executive for Business Support Services

Mark Smith

mark.smith@nara.gov

Mark Smith is NARA's Executive for Business Support Services, leading all aspects of NARA's programs for real property, physical security, field administrative support, and personal property management. Mark has served as acting Executive for Business Support Services since January 2021.

Mr. Smith joined NARA as Chief Facilities Engineer and Operations Manager within Business Support Services in September 2020. Prior to joining NARA, Mr. Smith served in numerous facilities management leadership positions for the Department of the Navy. He most recently

served as the senior civilian in the Regional Engineer's Office, Navy Region Europe, Africa, Central (EURAFCENT), where he directed planning, facility management, and project development for Navy installations on three continents.

Mr. Smith holds a bachelor's degree in civil engineering from the University of Southern California and a master's degree in architecture from the University of California, Los Angeles. He is a registered Professional Engineer in the State of California.



Chief Financial Officer

Colleen Murphy

colleen.murphy@nara.gov

Colleen Murphy was appointed as NARA's Chief Financial Officer in October 2016. As CFO, she is the principal adviser to the Archivist on federal financial management and provides enterprise wide leadership for budget, accounting policy and operations, financial reporting, and operation of NARA's Trust and Gift Funds. From 2010 to 2016, Ms. Murphy served as NARA's Accounting Officer. She has bachelor degrees from the University of Maryland in accounting and government and politics.



Chief Human Capital Officer

Valorie Findlater

valorie.findlater@nara.gov

Valorie Findlater is NARA's Chief Human Capital Officer (CHCO) as of June 2021. As the CHCO, she provides leadership and management of human capital planning, policy, program development and guides leadership in creating an environment that is conducive to strengthening the workforce's capacity to communicate, learn, collaborate and work together effectively. Ms. Findlater joined NARA in 2014. Prior to her current appointment, she served as the Director of Employee and Labor Relations, Performance Management and Benefits Division. Valorie holds a bachelor of science degree in Business Administration from the University of the West Indies, Jamaica.



Director, Equal Employment Opportunity (EEO) Program

Erica Pearson

erica.pearson@nara.gov

Erica Pearson is the Director of the Equal Employment Opportunity Office. As Director, she is the principal advisor to the Archivist on all EEO matters, and is responsible for the leadership and oversight of the agency's EEO program. Ms. Pearson works toward the systemic improvement of various aspects of equal

employment opportunity which includes programs such as EEO complaints, Anti-harassment, Disability and Diversity and Inclusion. Ms. Pearson holds a bachelor of arts in accounting and a master's in Human Resource Management.

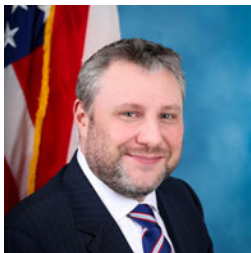


Acting Director, Congressional Affairs

Shawn Morton

shawn.morton@nara.gov

Shawn Morton was appointed Acting Director of Congressional Affairs on September 9, 2024. He has served as the Deputy Director since 2010. From 1999 to 2010, he was a Congressional Affairs Specialist and later Special Assistant to the Chief Operating Officer at the Library of Congress. He began his career at NARA in 1992 as a Program Analyst and Congressional Affairs Specialist before departing for LOC. He holds a bachelor of arts degree in American history from the University of Alabama.



Senior Advisor

Ellis Brachman

ellis.brachman@nara.gov

Ellis Brachman is the Senior Advisor to the Archivist of the United States. As a member of NARA's Executive Management Team, Mr. Brachman serves as a confidential aide to the Archivist, supports outreach and engagement, and provides counsel on agency strategy, policy and operations. Mr. Brachman joined NARA in July 2023 with over two decades of experience advising members of congress, senior government officials and C-suite executives at the nexus of public policy and public affairs. Before joining NARA, Mr. Brachman spent eight years at the Library of Congress as the communications officer for the Congressional Research Service (CRS), the Library's National and International Outreach (NIO) service unit, and the Office of the Chief Information Officer (OCIO). In those roles, he served as a senior advisor to Library leadership and helped the Library tell compelling stories about the nation's oldest cultural institution. Mr. Brachman also spent over 14 years as an advisor to members of Congress and national organizations. He served as chief spokesman and Communications Director for the House Democratic Caucus, the House Appropriations Committee, and three members of Congress. He also worked for a U.S. Senator and has advised on numerous congressional and public relations campaigns. A fourth-generation Texan, Mr. Brachman graduated from the University of Texas, Austin, with a bachelor of arts in government and history.



Director, Executive Secretariat

Merrily Harris

merrily.harris@nara.gov

As Director of the Executive Secretariat, Ms. Harris manages the operations of the Archivist's Office, ensures effective communication with all NARA units, and assists the Archivist and Deputy Archivist in coordinating program and policy matters across the agency to achieve NARA's mission and strategic goals. Ms. Harris began her NARA career in 2008 as an archivist with the Presidential Materials Division, where she coordinated the White House archival courtesy storage program. Ms. Harris served as the Assistant Director of the Center for Legislative Archives from 2016 to 2018, managing the archival program for Legislative records and serving as a liaison with congressional archival staff and record creators. From 2018 to 2023, Ms. Harris served as the Chief of Staff for the Office of Legislative Archives, Presidential Libraries, and Museum Services, where she provided support to the Executive on the full range of office programs and initiatives. Before joining NARA, Ms. Harris worked as an archivist and special collections librarian at the W.S. Hoole Special Collections Library at the University of Alabama and served in the Tuscaloosa Public Library System as a branch library director and reference librarian. Ms. Harris has a bachelor of arts in english and history, a master of library and information studies, and a master of arts in history, all from the University of Alabama.



PRESIDENTIAL TRANSITION 2024–2025

VIII. Office of Inspector General



PRESIDENTIAL TRANSITION 2024–2025

National Archives Office of Inspector General

The Office of Inspector General (OIG) is an independent unit within NARA charged with preventing and detecting fraud, waste, and abuse and promoting economy, efficiency, and effectiveness of agency programs and operations. Through our audits, investigations, and other inquiries we provide oversight helping NARA run more effectively and efficiently. We are agents of positive change striving for continuous improvement in NARA and our office.

Brett M. Baker has been the Inspector General since 2021.

What We Do

We perform audits, evaluations, and investigations to promote integrity and efficiency of NARA's programs and operations. In addition, we provide Semi-Annual Reports to Congress as of March 31 and September 30 of each year detailing the results of our work from the previous six months.

Important Facts About the OIG

- Currently staffed with 15 FTEs based in College Park, MD, the OIG is funded by its own appropriation of approximately \$6.0 million.
- There are five armed criminal investigators on staff with statutory law enforcement authority.
- All NARA employees shall cooperate fully with the OIG and have the responsibility to report suspected criminal acts, fraud, waste, abuse and gross mismanagement to the OIG.
- The IG has access to all records and information available to the agency.
- The OIG may issue subpoenas to non-federal individuals and entities for records and information.
- Under the IG Act, the IG is required to keep both Congress and the head of the agency fully and currently informed concerning fraud and other problems. The IG meets regularly with the Archivist to ensure effective communication.
- The IG is a non-partisan position and is selected without regard to political affiliation. The IG is appointed by and is under the general supervision of the Archivist.
- While many larger OIGs maintain their own support offices (e.g., HR, IT, procurement, budget, and travel), we utilize agency offices for economy.

Top Management Challenges

The following summarizes NARA's most significant management and performance challenges based on legislative mandates, our experience, stakeholder input, and observations from our oversight work.

1. Information Technology (IT) Security

Annual Federal Information Security Modernization Act (FISMA) audits or assessments have consistently identified IT areas in need of significant improvement, however, in FY 2024, NARA downgraded IT security from a material weakness to a reportable condition.

2. Electronic Records Archives (ERA)

ERA has become a "system of systems," and the original ERA Base System was not capable of meeting the nation's needs. Thus, NARA is developing ERA 2.0, with an estimated lifecycle cost of at least \$94 million. However, until ERA 2.0's functionality is built and put into full production, the current ERA's longstanding deficiencies may continue to impact NARA. Further, the vast volumes of electronic records that need to be preserved are significant, and NARA is challenged to meet data storage requirements for them. NARA's in-house data storage is reaching capacity, impacting the agency's digitization efforts and other IT programs. Without sufficient storage, NARA would have difficulty accepting, storing, and processing electronic records or making them available to the public.

3. Transition to Electronic Records

NARA must work with federal agencies to ensure proper appraisal, scheduling, and transfer of permanent records in all formats. To a large extent, NARA also ensures that proper records are, in fact, preserved government-wide and sent to NARA in the first place. However, the major challenge is how best to accomplish this in a rapidly changing technological environment. Further, it is not currently known what amount, or exact formats, of data and electronic records will be coming to NARA. Thus, it is unknown whether the systems in place will be able to ingest, process, preserve, store, and provide access to this information.

4. Expanding Public Access to Records

Ten percent of NARA's analog holdings (by series) have not been processed, so the public does not have efficient and effective access to them. To meet its mission, NARA must work to ensure it has the processes and resources necessary to establish intellectual control over this backlog of unprocessed records. In addition, the transition of federal record-keeping to a fully electronic environment will present additional challenges to making records accessible to the public.

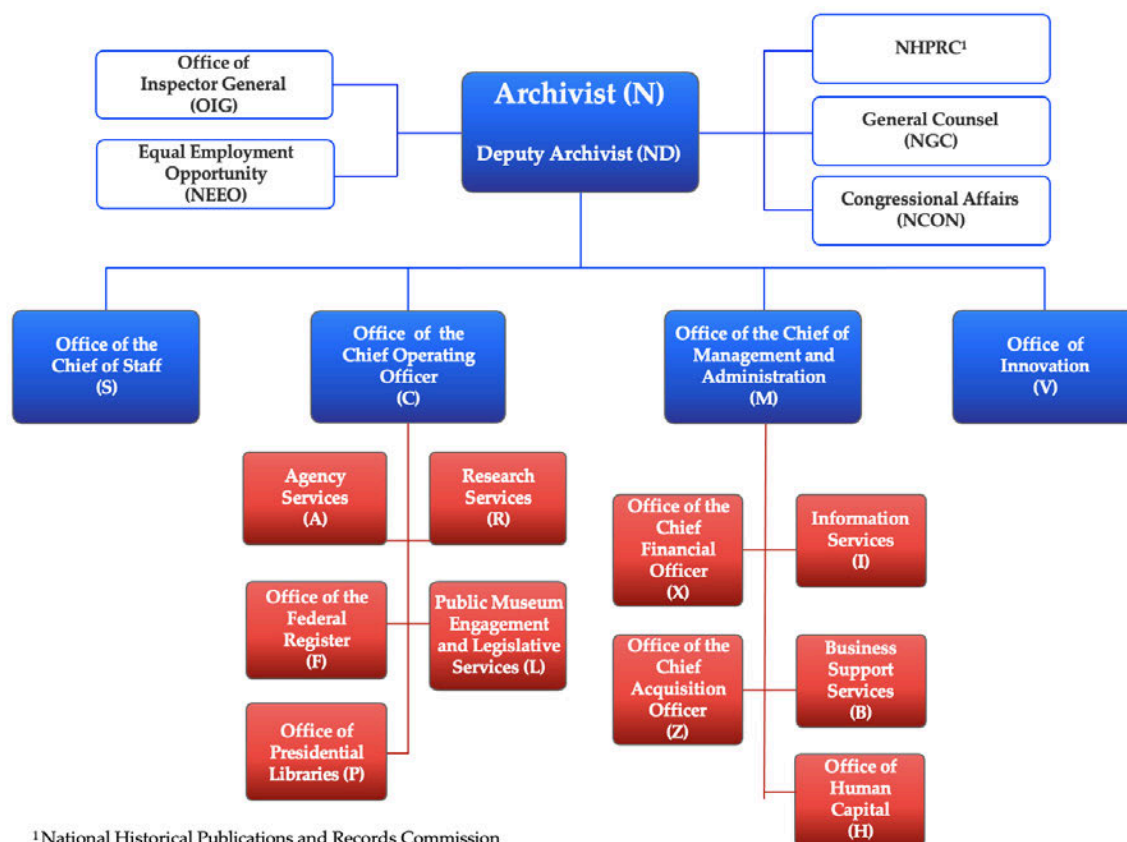
5. Human Capital Management

NARA began identifying human capital practices as a material weakness in FY 2018 as the result of OIG Audit No. 18-AUD-09, which found numerous internal control issues within NARA's Office of Human Capital. In FY 2023, NARA removed Human Capital as a reportable condition. Still, collaboration between NARA and its shared service provider continues to be needed to ensure human resource data is correct for all current and former employees.

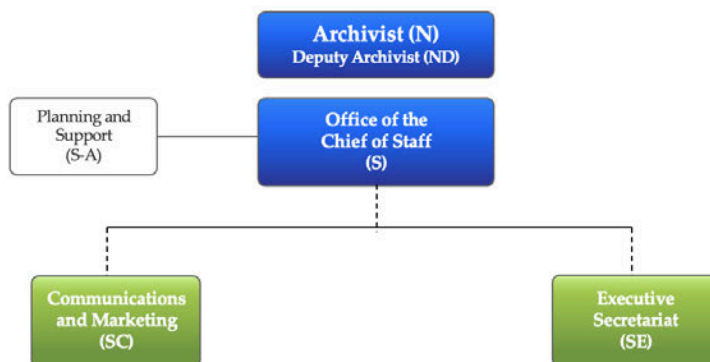


IX. Organizational Charts

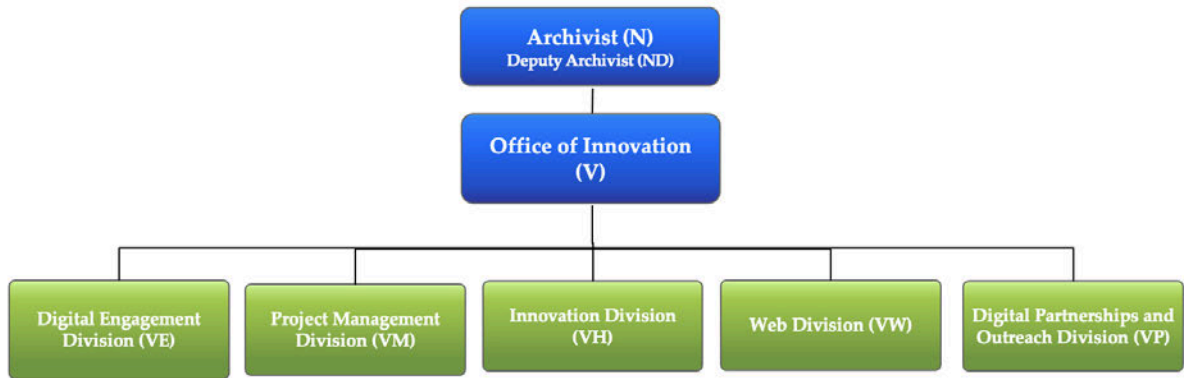
NARA Organization Chart



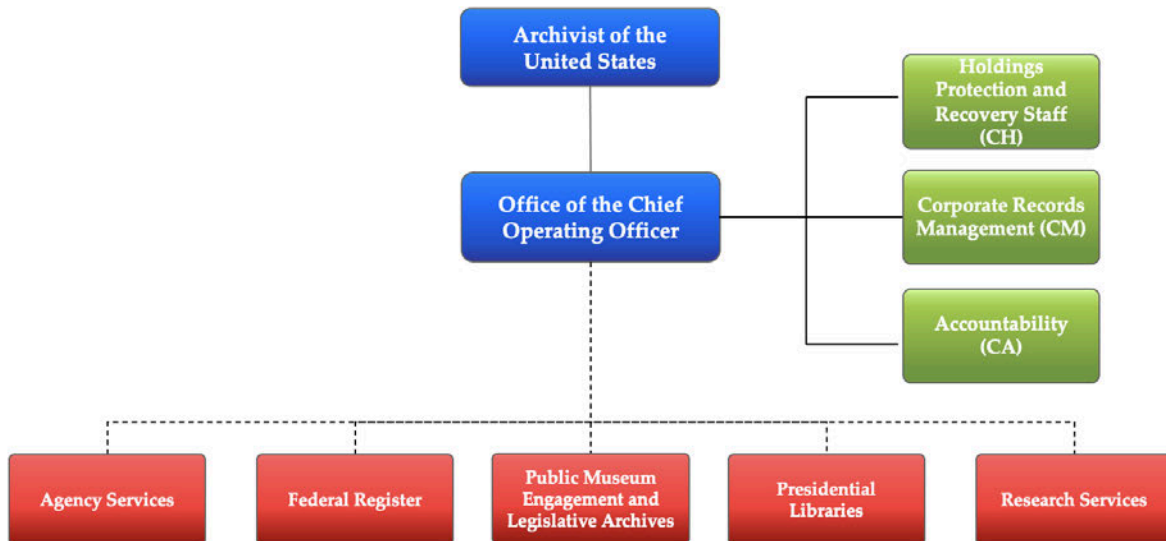
Office of the Chief of Staff



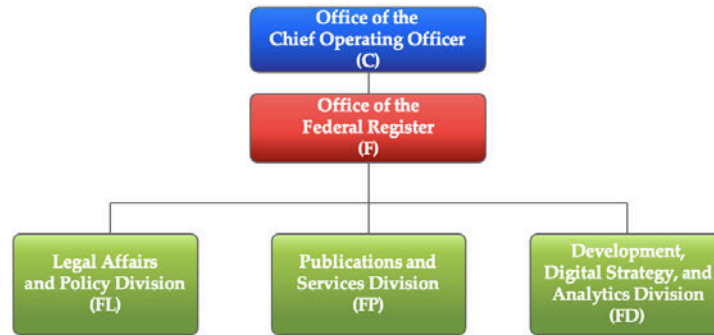
Office of Innovation



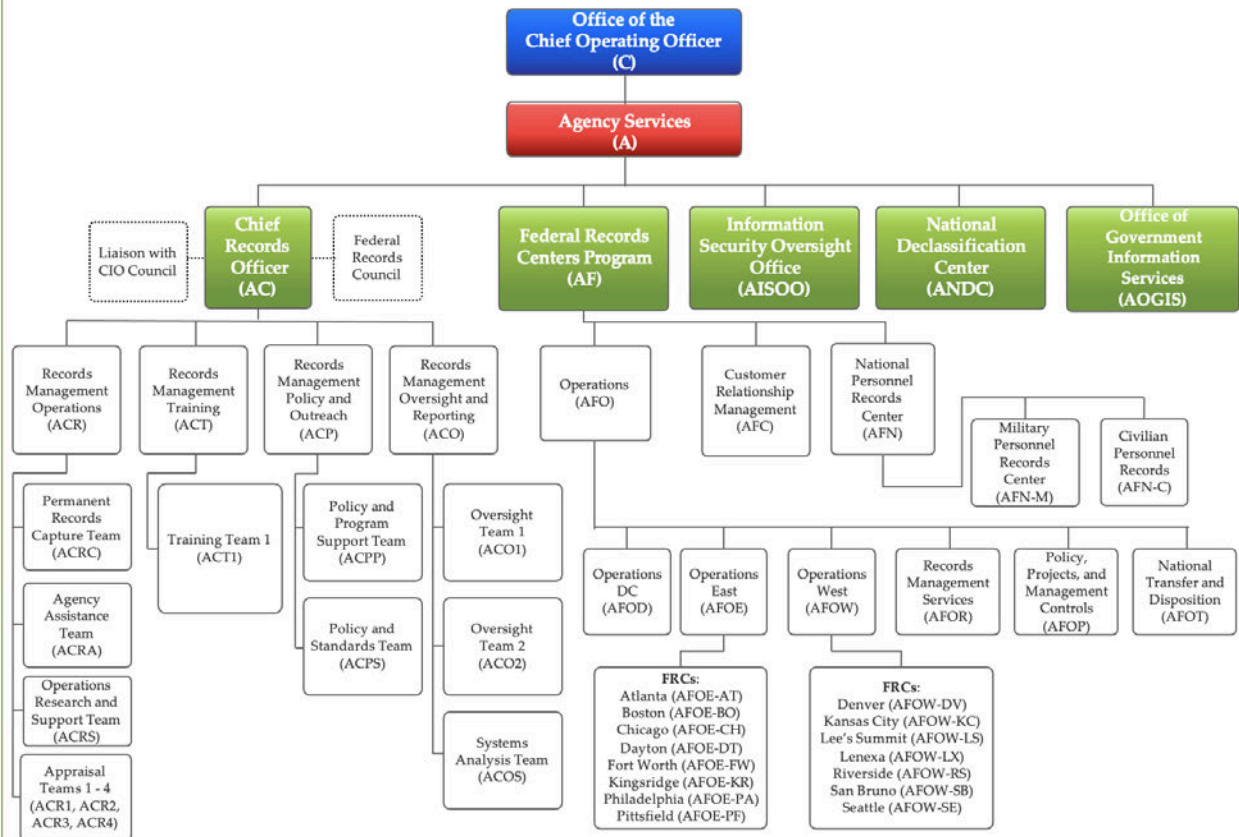
Office of the Chief Operating Officer



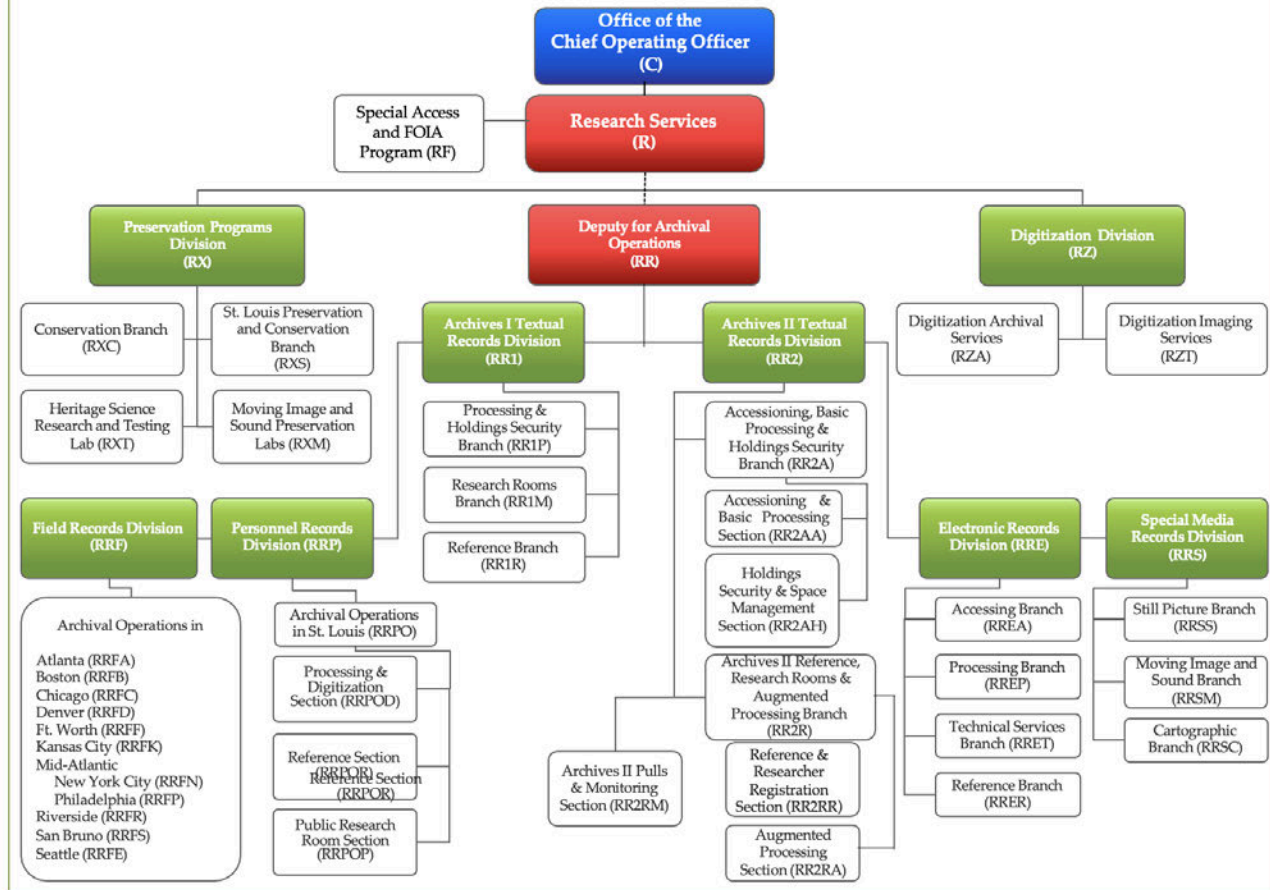
Office of the Federal Register



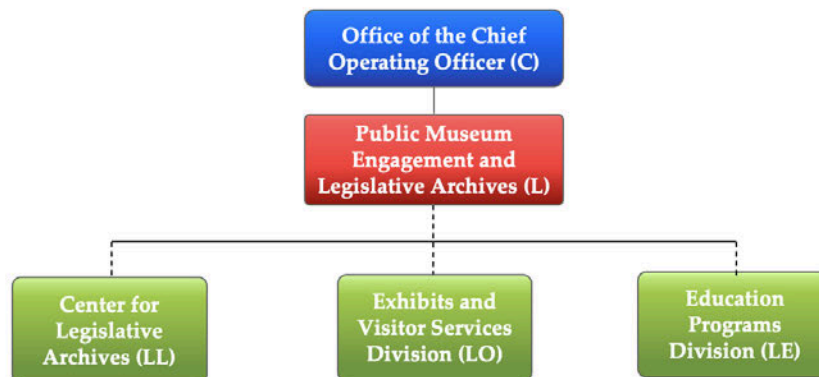
Agency Services



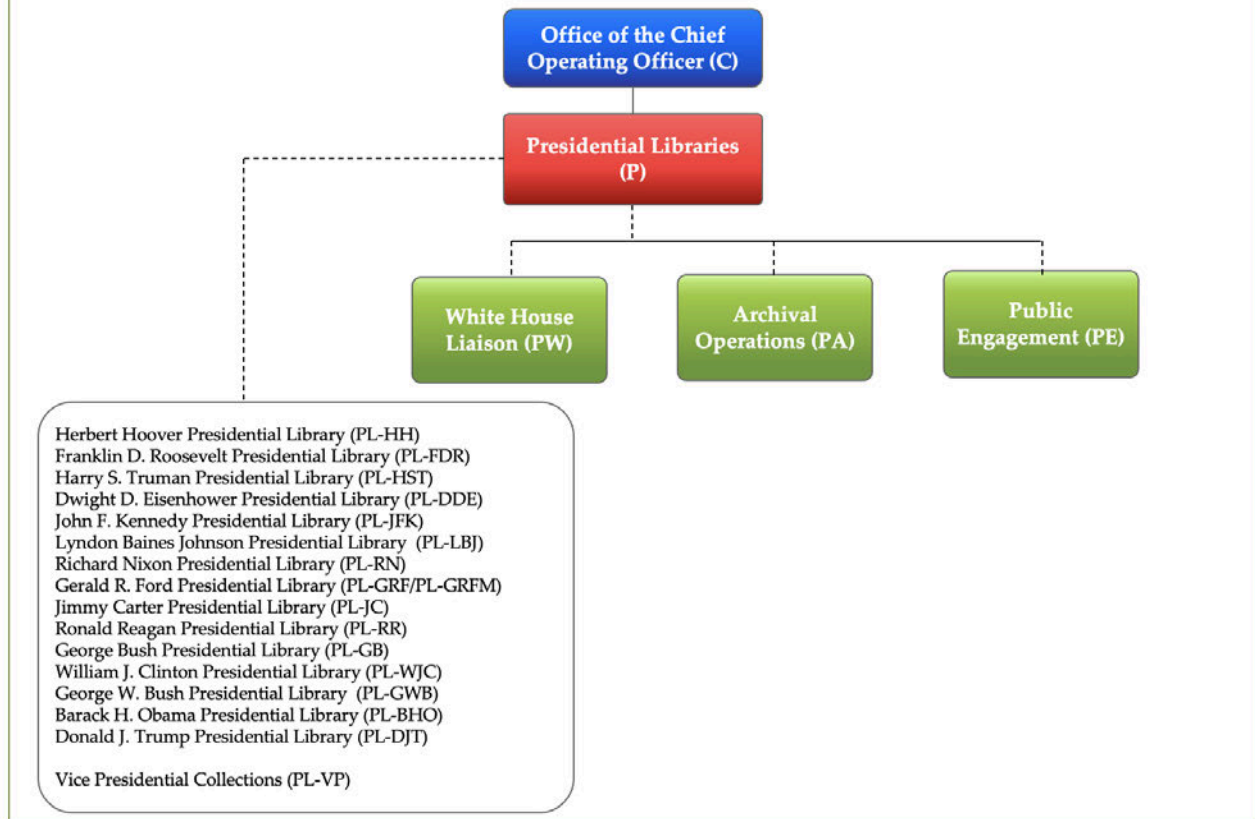
Research Services



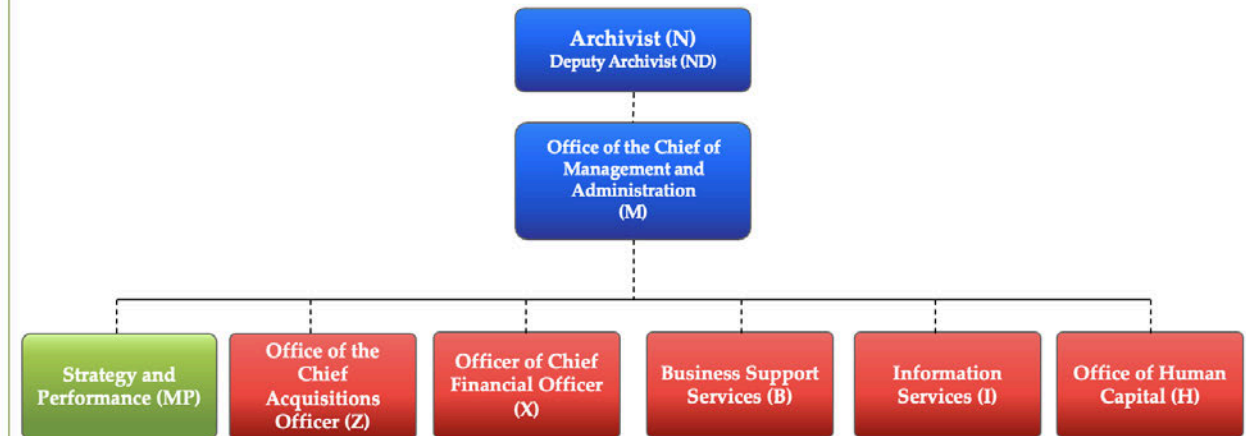
Public Museum Engagement and Legislative Archives



Office of Presidential Libraries



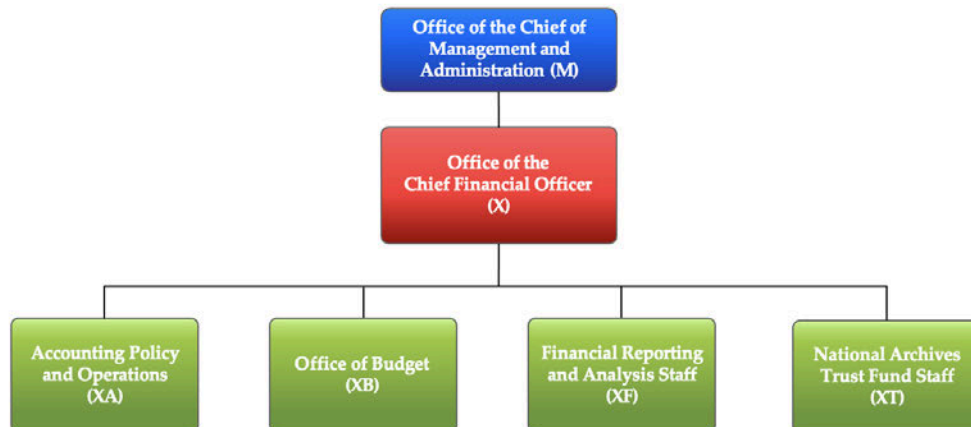
Office of the Chief of Management and Administration



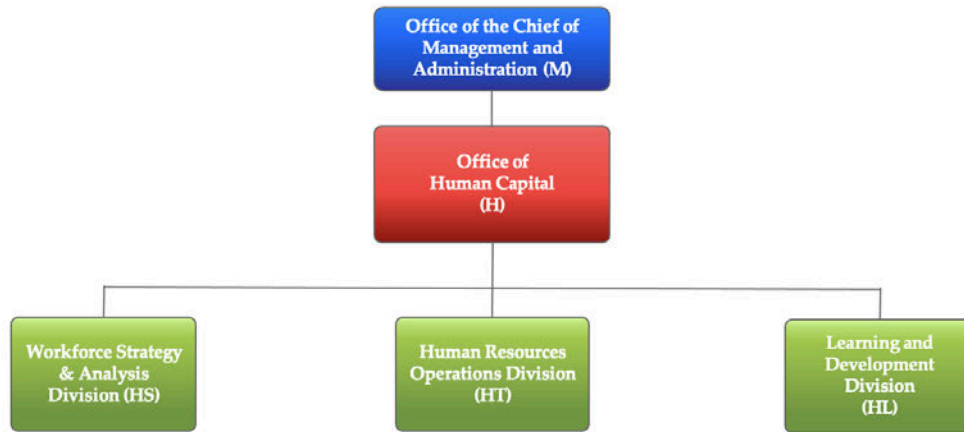
Office of the Chief Acquisition Officer



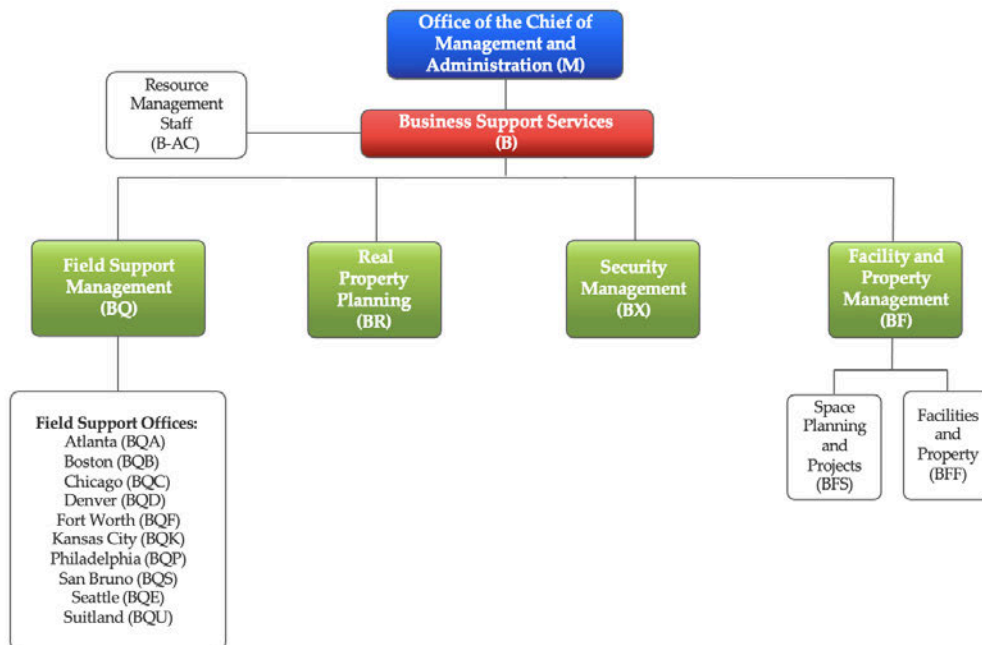
Office of the Chief Financial Officer



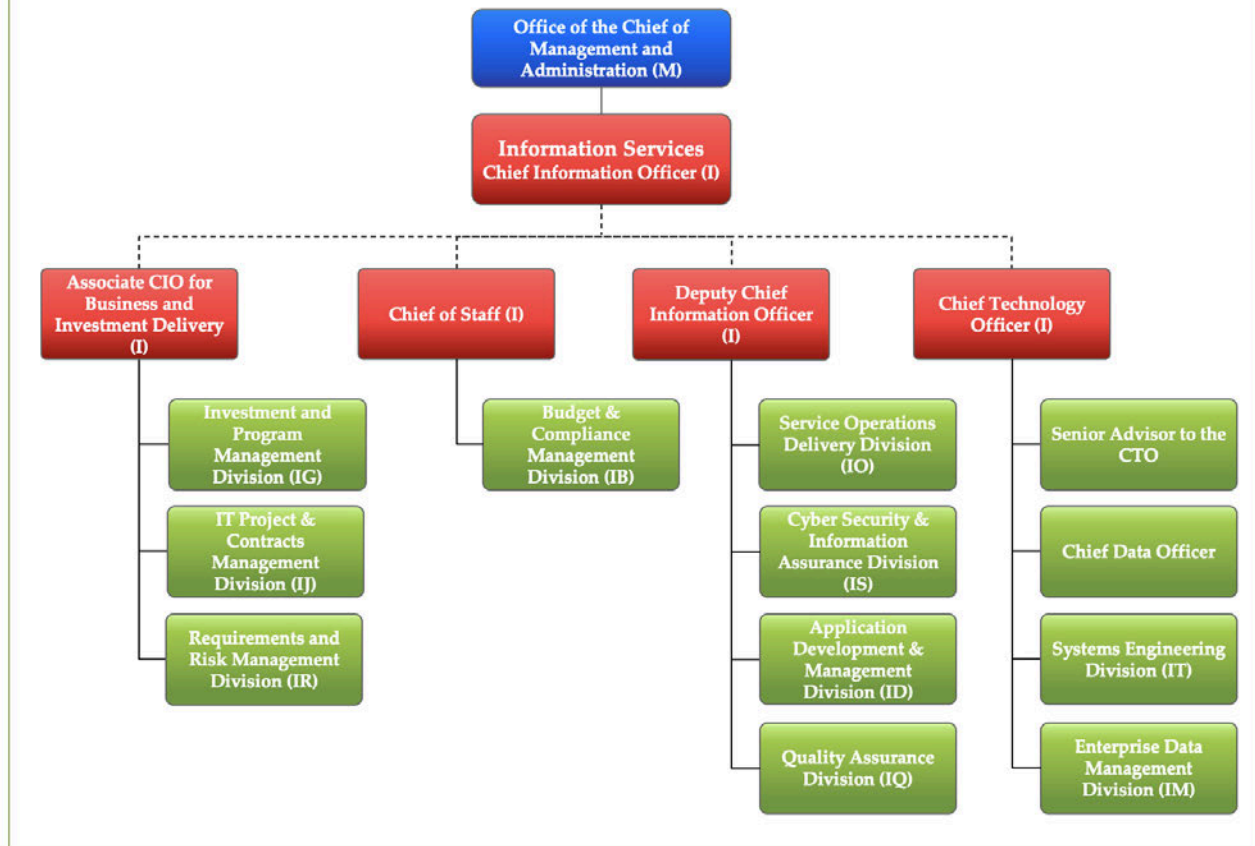
Office of Human Capital



Business Support Services



Information Services





PRESIDENTIAL TRANSITION 2024–2025

X. Administrative Information



PRESIDENTIAL TRANSITION 2024–2025

Administrative Information for the Agency Review Team (ART)

NARA Points of Contact (POCs) for ART Members

(b) (6), will serve as the POC for ART members. Jay Trainer, Chief Operating Officer, will serve as the alternate POC. ART members should contact (b) (6) or Jay with any questions regarding logistical issues, information needs, or scheduling of briefings/tours.

POC: (b) (6)

- Work: (b) (6)
- Cell: (b) (6)
- Email: (b) (6)@nara.gov

Alternate POC: Jay Trainer, Chief Operating Officer

- Work: 301-837-3064
- Cell: (b) (6)
- Email: jay.trainer@nara.gov

Facility and Workstations

NARA is able to provide ART members with a dedicated conference room and access to wifi at the [National Archives at College Park](#) (Archives II), 8601 Adelphi Road, College Park, MD, 20740. Upon arrival at the Adelphi Road entrance, the security officer will check the driver's license of the operator and photo identification of any passengers (all visitors must present photo ID) and direct the driver to available parking. After parking, visitors should enter the building through the main entrance and pass through security control into the front lobby.

Basic office supplies (e.g., pens, stapler, etc.) will be available for ART members at their workspace. There is dedicated WiFi available for ART members at their designated workspace in College Park and public WiFi in many areas of the College Park and Washington D.C. buildings.

Badging Process

In order to receive building credentials (i.e., badges) for access to general staff areas, ART members will need to work with (b) (6) to submit a facility access request. NARA's

Security Office will then process the request, which takes approximately three to five business days. Prior to receiving NARA building credentials, ART members will need to be escorted at all times in staff-only areas.



www.archives.gov