THE
NATIONAL ARCHIVES
AND RECORDS ADMINISTRATION

RECORDS MANAGEMENT TRAINING PROGRAM

Introduction

As part of National Archives and Records Administration's (NARA) mission to ensure ready access to essential evidence that documents the rights of American citizens, the actions of Federal officials, and the national experience, we partner with stakeholders to ensure that:

- Federal agencies can economically and effectively create and manage records necessary to meet business needs;

- Records are kept long enough to protect rights and assure accountability; and

- Records of archival value are preserved and made available for future generations.

To achieve our goals, NARA's Strategic Plan calls for a redesign of Federal records management, including a change in Federal records policies and procedures. NARA has developed updated records management courses designed to meet the changing Federal recordkeeping environment.

Records Management Courses Offered Nationwide

Training is delivered at NARA regional facilities, the National Archives at College Park, and other locations across the country. NARA offers courses in six "Areas of Knowledge" that are relevant to anyone responsible for managing Federal records.

Participants in NARA's records management courses will receive a comprehensive overview of managing information by performing practical task-oriented, hands-on exercises throughout each course. The courses focus on using records management as a tool for supporting agency business processes. Upon completion of these courses, participants will have the information and skills necessary to perform their records management duties more efficiently and effectively.

THESE COURSES ARE:

- Knowledge Area One—Records Management Fundamentals
- Knowledge Area Two—Creating and Maintaining Agency Business Information
- Knowledge Area Three—Records Scheduling
- Knowledge Area Four—Records Schedule Implementation
- Knowledge Area Five—Asset and Risk Management
- Knowledge Area Six—Records Management and Program Development

Certification of Federal Records Management Training

NARA offers an optional certification program for individuals who successfully complete training in Federal records management. The goals of the NARA certification program are to:

- Raise awareness and improve effectiveness of Federal records management;

- Increase the level of professionalism of those managing Federal records;

- Give Federal records professionals a set of benchmarks to gauge their professional development, and

- Give NARA the ability to better assess the effectiveness of its training program.

Participants may take examinations upon completion of Knowledge Areas Two through Six. Those who successfully pass all five examinations will receive NARA's Certificate of Federal Records Management Training, signed by the Archivist of the United States. Knowledge Area One is recommended as a foundation course for those seeking certification but is not required to obtain certification.

Other Courses, Briefings, Workshops, and Tailored Training

In addition, NARA offers topical courses, briefings, and workshops across the country. The specific offerings address e-mail, electronic records, digital imaging, vital records and disaster preparedness. Detailed descriptions and information about each of these courses are available on NARA's web site at *http://www.archives.gov/records_management/ training/training.html.*

NARA also develops tailored training to meet the particular needs of an agency. Training can be conducted at that agency's location. Pricing for tailored training is dependent upon the amount of customization and development necessary. For more information on agency-specific offerings, please contact your NARA representative or place your request through *records.mgt@nara.gov.*

Courses are open to all Federal employees, Federal contractors, and employees of state and local governments and international organizations. It is important that non-Federal participants understand that information provided in NARA's records management classes is based on relevant Federal laws, regulation, policies, and procedures.

NARA does not discriminate on the basis of race, sex, color, national origin, disability, religion, age, marital status, sexual orientation, or status as a parent in its records management training classes.

Records Management Fundamentals

What are valuable agency resources and business assets? Records. This course provides an overview of the basic concepts and practices of managing Federal records. It covers the variety of activities involved at each stage of the records lifecycle—creation, maintenance and use, and disposition.

OUTCOMES:

By the end of the course, participants will be able to

- Define Federal records and distinguish them from nonrecord materials and personal papers

- Understand the organization and function of an agency records management program

- Know the basic strategies, including recordkeeping requirements, for managing records in all formats

- Describe the long-term use and potential permanent value of records

WHO SHOULD ATTEND?

All Federal personnel will find this introductory course helpful to understanding Federal records management. This course will be especially useful for agency managers and employees who can only attend records management training for one day. Although this course is not part of the Certification of Federal Records Management Training, it is recommended as a foundation course for anyone interested in taking the five records management courses that are required for the optional certification program.

LENGTH: 1 day

COST: $150

Creating and Maintaining Agency Business Information

What are Federal records management requirements, why are they important, and how are they applied to agency records? This course focuses on the development and implementation of polices and procedures for adequate and proper documentation of agency business. It demonstrates how recordkeeping requirements for creating and maintaining records can improve the economy and efficiency of agency operations.

OUTCOMES:

By the end of the course, participants will be able to

- Identify Federal records and how they are used to document and support the business process

- Determine the recordkeeping requirements, for paper and electronic records, that ensure adequate and proper documentation of agency business operations

- Gather information about records as a basis for efficient filing and storage solutions

- Maintain the records specific to your agency's program, including those created by e-mail, word processing, and imaging systems

- Know the strategies and challenges for satisfying recordkeeping requirements in electronic documents or records management systems

WHO SHOULD ATTEND?

Anyone involved with the development or implementation of a records system, whether using traditional paper filing methods or electronic document or records management applications.

LENGTH: 2 days

COST: $300

This course is required for obtaining NARA's Certification of Federal Records Management Training.

Records Scheduling

What do you do with information and records that you no longer need for business purposes? How you schedule your records determines the basis for meeting your agency's operating, fiscal and legal needs. The course covers the legal requirements and practical advantages in scheduling records and the disposition practices necessary to meet an agency's business needs and NARA recordkeeping requirements.

OUTCOMES:

By the end of the course, participants will be able to

- Perform a business and records analysis to determine information needs and identify risks associated with records disposition

- Gather information about records as a basis for preparing a records schedule

- Apply the General Records Schedules to standard administrative records

- Develop disposition instructions for records, in all media, based on agency business needs, accountability, legal issues and archival value

- Know the steps in obtaining internal and external approvals of the Standard Form 115 (SF 115)

WHO SHOULD ATTEND?

Anyone responsible for developing or updating agency records schedules or whose work is associated with developing records retention requirements for records and information systems.

LENGTH: 2 days

COST: $300

This course is required for obtaining NARA's Certification of Federal Records Management Training.

Records Schedule Implementation

How do you use an approved records schedule? Using a records retention schedule or records manual is easier than you think. This course provides an overview of how to apply the General Records Schedule and NARA approved record schedules to Federal agency records. It covers the steps involved in the disposition of records, including destroying temporary records, transferring temporary records to off-site storage, and transferring permanent records to the National Archives.

OUTCOMES:

By the end of the course, participants will be able to

- Apply the General Records Schedules and NARA approved record schedules to agency records

- Complete Standard Form 135 (SF 135) for transferring records to NARA records centers

- Complete Standard Form 258 (SF 258) for transferring legal and physical custody of permanent records to the National Archives

- Draft internal agency guidelines for the disposition of temporary records and transfer of permanent records to NARA

- Train staff on schedule implementation

WHO SHOULD ATTEND?

Anyone responsible for creation, maintenance and use, and disposition of agency business records particularly staff who transfer records to records centers or the National Archives.

LENGTH: 2 days

COST: $300

This course is required for obtaining NARA's Certification of Federal Records Management Training.

Asset and Risk Management

Are records valuable assets to your agency business process? Of course! How you manage your assets by applying appropriate records management procedures is a critical task in any organization. This course covers the fundamentals of risk management and cost benefit analysis and how they relate to maintaining a viable records management program. This course raises an awareness of risk situations and provides managers with the decision-making tools they need to address current and future program needs.

OUTCOMES

By the end of the course, participants will be able to

- Understand the key concepts of analyzing and managing the risk to agency assets (records)
- Identify and assess risk situations within your agency's records management program
- Prioritize risks and develop mitigation strategies
- Identify resources including the use of NARA services to develop a risk management program

WHO SHOULD ATTEND?

Anyone responsible for managing, operating, or evaluating agency programs, particularly agency records management programs, and staff responsible for developing policies that involve these programs.

LENGTH: 2 days

COST: $300

This course is required for obtaining NARA's Certification of Federal Records Management Training.

Records Management Program Development

How effective is your agency's records management program? This course covers the concepts and practices involved in developing a successful records management program and subsequent evaluations. You will learn how to market and promote your program including the development of a training program for all levels of agency staff.

OUTCOMES:

By the end of the course, participants will be able to

- Evaluate current recordkeeping practices within your agency
- Analyze need for using external resources to assist with your agency
- Market and promote your agency's records management program
- Establish an effective training program for all levels of personnel
- Protect records from unauthorized destruction and alienation

WHO SHOULD ATTEND?

Anyone responsible for managing, operating, or evaluating records management programs and those involved in the development of records management training for agency staff.

LENGTH: 1 day

COST: $150

This course is required for obtaining NARA's Certification of Federal Records Management Training.

Training is offered through these locations:

COLLEGE PARK

National Archives at
   College Park
8601 Adelphi Road
College Park, Maryland
   20740-6001
301-837-0660
301-837-3699 (fax)

REGIONS

ANCHORAGE

NARA–Pacific Alaska Region
654 West Third Avenue
Anchorage, Alaska 99501-
   2145
907-271-2441
907-271-2442 (fax)

ATLANTA

NARA–Southeast Region
1557 St. Joseph Avenue
East Point, Georgia
   30344-2593
404-736-2829
404-736-2923 (fax)

BOSTON

NARA–Northeast Region
380 Trapelo Road
Waltham, Massachusetts
   02452-6399
781-663-0130
781-663-0155 (fax)

CHICAGO

NARA–Great Lakes Region
7358 South Pulaski Road
Chicago, Illinois 60629-5898
773-948-9000
773-948-9050 (fax)

DAYTON

NARA–Great Lakes Region
3150 Springboro Road
Dayton, Ohio 45439-1833
937-425-0600
937-425-0640 (fax)

DENVER

NARA–Rocky Mountain
   Region
Building 48-Denver
   Federal Center
West 6th Avenue and
   Kipling Street
Denver, Colorado
   80225-0307
303-407-5700
303-407-5731 (fax)

FORT WORTH

NARA–Southwest Region
501 West Felix Street
P.O. Box 6216
Fort Worth, Texas
   76115-3405
817-207-6300
817-207-6318 (fax)

KANSAS CITY

NARA–Central Plains Region
2312 East Bannister Road
Kansas City, Missouri
　64131-3011
816-268-8000
816-268-8038 (fax)

LAGUNA NIGUEL

NARA–Pacific Region
24000 Avila Road, First
　Floor-East Entrance
Laguna Niguel, California
　92677-3497
949-360-2642
949-360-2624 (fax)

NEW YORK CITY

NARA–Northeast Region
201 Varick Street
New York, New York
　10014-4811
212-401-1620
212-401-1638 (fax)

PHILADELPHIA

NARA–Mid Atlantic Region
Record Center Program
　Facility
14700 Townsend Road
Philadelphia, Pennsylvania
　19154-1096
215-305-2000
215-305-2038 (fax)

PITTSFIELD

NARA–Northeast Region
10 Conte Drive
Pittsfield, Massachusetts
　01201-8230
413-236-3600
413-236-3609 (fax)

SAN FRANCISCO

NARA–Pacific Region
1000 Commodore Drive
San Bruno, California
　94066-2350
650-238-3500
650-238-3507 (fax)

SEATTLE

NARA–Pacific Alaska Region
6125 Sand Point Way NE
Seattle, Washington
　98115-7999
206-336-5115
206-336-5112 (fax)

For a complete calendar of classes scheduled, and for more information on specific offerings and forums, please see our website at **http://www.archives.gov/records_ management/training/training.html.**

**National Archives and
Records Administration**

National Archives Trust Fund Board
700 Pennsylvania Avenue, NW
Washington, DC 20408