

# National Archives and Records Administration

## FY 2024 ANNUAL PERFORMANCE REPORT

### CONTENTS

NARA Mission, Vision, and Goals	2
Performance by Strategic Goal	3
Make Access Happen	3
Connect with Customers	9
Maximize NARA's Value to the Nation	12
Build our Future through our People	16

## NARA Mission, Vision, and Goals

The National Archives and Records Administration's (NARA) FY 2022 – FY 2026 Strategic Plan details the actions and outcomes necessary to meet agency Strategic Goals. NARA's Annual Performance Plan lists the performance objectives and measures that NARA uses to evaluate performance progress against those goals.

### *MISSION:*

WE DRIVE OPENNESS, CULTIVATE PUBLIC PARTICIPATION, AND STRENGTHEN OUR NATION'S DEMOCRACY THROUGH  
EQUITABLE PUBLIC ACCESS TO HIGH-VALUE GOVERNMENT RECORDS.

### *VISION:*

WE WILL BE KNOWN FOR CUTTING-EDGE ACCESS  
TO EXTRAORDINARY VOLUMES OF GOVERNMENT INFORMATION AND  
UNPRECEDENTED ENGAGEMENT TO BRING GREATER MEANING TO THE MANY DIFFERENT AMERICAN EXPERIENCES.

### *STRATEGIC GOALS:*

**MAKE ACCESS HAPPEN.**— NARA will make all records available to the public in digital formats, to ensure that anyone can explore, discover, and learn from NARA holdings.

**CONNECT WITH CUSTOMERS.**—NARA will continuously engage with and learn from our customers: individuals, communities, organizations, and other Federal agencies. We build long-term and strategic customer relationships to ensure our services are valued by our customers and we work together to improve our efficiency, engagement, and equity.

**MAXIMIZE NARA'S VALUE TO THE NATION.**—NARA will reform and modernize records management practices across the Federal government, advancing digital preservation of archival electronic records, and supporting the transition to digital government.

**BUILD OUR FUTURE THROUGH OUR PEOPLE** —NARA will provide all our employees with the learning and leadership opportunities necessary to support their career development, enable their successful transition to a digital environment, and thrive in an inclusive, supportive, and diverse work environment.

The *President's Budget* identifies lower-priority program activities, as required by 31 U.S.C. § 1115(b) (10). NARA received no aid from non-Federal parties in preparing this plan.

## Performance by Strategic Goal

### Make Access Happen

*Make Access Happen* affirms that “public access” is NARA’s core mission and is a higher calling that gives purpose and meaning to all our work. We are making access happen by delivering increasing volumes of records to the public online, using flexible tools and accessible resources that promote public participation. We are engaging with underserved communities to find opportunities to expand public participation and promote equity through our mission. To achieve success in this goal, NARA must digitize millions of records we hold in analog formats, keep pace with the continuous stream of new records we receive each year, and develop new ways to help citizens find our records through the online National Archives Catalog.

**Objective 1.1: *By FY 2026, NARA will process 85 percent of archival holdings and increase enhanced descriptions to promote equity in discovery and public access to archival records related to underserved communities.***

Description of measure: Archival processing refers to those actions NARA must take to enable efficient access for research, which includes performing holdings maintenance, entering the records into NARA’s inventory control system so that NARA staff can retrieve and serve those records when requested, and describing the records in the National Archives Catalog. Maintaining 85 percent processed requires continuous effort because NARA typically receives about 100,000 cubic feet of new, unprocessed archival records in traditional formats each year, as well as significant volumes of electronic records.

NARA has further committed to increase enhanced descriptions of records related to underserved communities. Underserved communities are populations who have been denied consistent and systemic fair, just, and impartial treatment, as defined in Executive Order (E.O.) 13985. Enhanced processing provides a more detailed description of individual records, which makes it easier for members of the public to search and discover relevant records. NARA archival records document the rights of citizens, provide a record of government decisions and actions, and record the history of the United States government. Enhanced description promotes equity by making it easier for members of underserved communities to search, discover, and use archival records to exercise their rights of citizenship, ensure government accountability, and illuminate the struggles and contribution of underserved communities in American history.

<b>Performance Measure</b>	<b>Year</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
Percent of unclassified archival holdings processed	<i>Target</i>	82%	85%	85%	85%
	<i>Actual</i>	81%	91%	90%	90%
NARA will target record series related to or about underserved communities identified during prioritization efforts, to conduct augmented processing and	<i>Target</i>	—	Baseline	2M pages and 75K digital files	8M pages and 182K digital files
	<i>Actual</i>	—	—	TBD	22M pages and 459K digital files
Total number of unclassified archival, holdings processed	<i>Target</i>	—	—	—	—
	<i>Actual</i>	4.6M	4.7M	4.7M	4.8M

Performance summary: NARA has processed a cumulative total of 4.8 million cubic feet of unclassified archival records, resulting in 90 percent of total unclassified archival records being processed by the end of September 2024.

While NARA has substantially increased basic processing in recent years, many records lack sufficient description to allow for full discoverability. NARA addresses this challenge by adding additional, or “enhanced” processing and descriptions to selected records that have already been processed to the basic level. Enhanced descriptions are more resource-intensive and are therefore performed on a more limited basis. NARA prioritized records of interest to underserved communities for enhanced descriptions.

**Objective 1.2: *By FY 2026, NARA will digitize 500 million pages of records and make them available online to the public through the National Archives Catalog.***

Description of measure: NARA has committed to digitize all its traditional (analog) holdings and make them available to the public online. NARA holds the equivalent of more than 13 billion pages of documents, photographs, films, and other records in analog formats, the majority of which are only accessible in person, in public research rooms, or through reproductions provided in response to specific customer requests.

NARA digitizes records and makes them available online to expand access to archival records and engage larger, more diverse groups in civic education and historical research. For many people interested in using NARA’s holdings, physical distance from NARA facilities and travel costs are a significant barrier to public access to archival holdings that are only available in traditional (analog) formats.

NARA must accelerate digitization processes and address technical limitations in the National Archives Catalog to meet NARA’s goals for online public access. NARA consults with external stakeholders to assign priorities for digitizing archival records and will publish agency priorities in a digitization plan. NARA must continue to invest in the Catalog to add increasingly larger volumes of digital files to the system. NARA must continue to enhance discovery and the customer experience.

<b>Performance Measure</b>	<b>Year</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
Number of pages digitized and made available online through the Catalog (cumulative)	<i>Target</i>	140M	190M	225M	320M
	<i>Actual</i>	150M	205M	217M	326M
Number of digital objects in the Catalog from partners (cumulative)	<i>Target</i>	—	134M	147M	160M
	<i>Actual</i>	—	153M	156M	197M
Number of digital objects in the Catalog from NARA custodial units (cumulative)	<i>Target</i>	—	55M	77M	162M
	<i>Actual</i>	—	52M	58M	129M
Number of citizen contributions to the Catalog (cumulative)	<i>Target</i>	—	9M	11M	12.7M
	<i>Actual</i>	8M	9M	9M	13.5M
Presidential Library websites with all digital copies in NAC (cumulative)	<i>Target</i>	—	—	1 (pilot)	3
	<i>Actual</i>	—	—	TBD	2

Performance summary: NARA is steadily progressing towards its goal of reaching 500 million pages in the Catalog by FY 2026. Throughout FY 2024 NARA made continuous improvements to the Catalog to enhance the customer experience. The agency exceeded the goal of making 160 million digital objects available in the Catalog by year end. In FY 2024 NARA also launched the next generation of Description and Authority Services (DAS). The Description and Authority Services is designed to scale, and functions as the back end of the Catalog where staff write descriptions and digital objects are added to those descriptions for export to the Catalog.

In FY 2024, NARA completed the migration of all digital copies and metadata from the Harry S. Truman Presidential Library and the Richard S. Nixon Presidential Library into the Catalog. The migration of digital copies and metadata from the George H.W. Bush Presidential Library is underway.

NARA established four new digitization partnerships in FY 2024. Partnerships are vital in supporting the digitization of NARA's archival records.

**Objective 1.3: *By FY 2026, NARA will collaborate with traditionally underserved communities to correct outdated descriptions in the National Archives Catalog and prioritize citizen engagement projects that increase access to records that are important to underserved communities.***

Description of measure: NARA is committed to revising and updating outdated descriptive language in the National Archives Catalog. NARA will engage with representatives of underserved communities and peer institutions to identify outdated language and develop procedures to update legacy descriptions. NARA will bring together subject matter experts from across the agency to identify records that are of highest interest to previously underserved communities for expedited review and digitization.

NARA will collaborate with underserved communities to guide its description work and will engage members of underserved communities in NARA holdings. NARA will engage the public in collaborative tagging and transcription of records related to underserved communities to make them more easily discoverable through standard search engines on the web. To be successful, NARA must build trusting relationships with underserved communities, cultivate subject matter experts in those records among NARA’s staff, and improve and develop NARA’s online resources.

<b>Performance Measure</b>	<b>Year</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
Instances of nonpreferred or harmful terms updated in the Catalog in consultation with the community (cumulative)	<i>Target</i>	---	---	1,000	2,000
	<i>Actual</i>	---	---	0	4,736
Collaboration access projects with Communities (annual)	<i>Target</i>	---	---	1	1
	<i>Actual</i>	---	---	1**	5
Dataset made available for bulk download for underserved communities or websites	<i>Target</i>	---	---	1	1
	<i>Actual</i>	---	---	0	2
Underserved communities that we routinely engage with (count)	<i>Target</i>	---	1 (pilot)	3	5
	<i>Actual</i>	---	2	3	4

Performance summary: NARA collaborates with underserved communities to improve access through a variety of means, including Catalog descriptions, transcription projects, developing finding aids, and web translation projects.

In FY 2024, NARA collaborated with members of the Puerto Rican and Japanese American communities to identify preferred language to be used in descriptions about the Puerto Rican and Japanese American communities. NARA met and exceeded the FY 2024 goal for reviewing and/or revising descriptions with preferred language with 4,736 descriptions reviewed out of which 1,002 descriptions were updated. NARA launched five new Citizen Archivist missions for digitized records related to underserved communities.

**Objective 1.4: *By FY 2026, 95 percent of customer requests will be ready within the promised time.***

Description of the measure: NARA strives to promote public access by providing consistent, reliable, and reputable service in response to customer requests. NARA provides service to a variety of public and federal agency customers. This objective is a weighted average of NARA's average response time when: furnishing items in public research rooms, responding to reference requests by email and mail, providing veterans and their families with copies of military separation documents (DD-214), and responding to Freedom of Information Act (FOIA) requests from the public.

NARA is currently modernizing business processes to develop and deploy new platforms associated with those processes from on-prem servers to cloud based platforms. These efforts are designed to improve service to customers by creating a digital repository to facilitate secure, digital delivery of reference requests. This will reduce costs, improve the reliability of services and reduce the cycle time from request to delivery. NARA is committed to continually improving the high standards of customer service to maintain the trust and confidence of its customers.

<b>Performance Measure</b>	<b>Year</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
Percent of customer requests ready within the promised time	<i>Target</i>	93%	93%	95%	95%
	<i>Actual</i>	40%	37%	89%	96%

Performance summary:

In FY 2024, NARA eliminated the remaining pandemic-related backlogs. Achieving this goal enabled NARA to return to pre-pandemic levels of service and in some cases exceeded those service delivery standards for customers. With the implementation of *M-23-07, Update to Transition to Electronic Records*, a number of federal customers shipped large volumes of records to the Federal Records Center Program (FRCP) before the deadline.

To better serve federal customers, NARA continued to maximize opportunities to digitally deliver reference requests to customers and explore innovative approaches to meet their requirements. The expanded use of eVetRecs and the corresponding tools associated with this application has enabled customers to monitor the status of their requests online without intervention from the customer service staff.

In FY 2024, NARA began integrating digitization on demand into our reference and reproduction processes as a baseline service. We are carefully monitoring and tracking the use of this new baseline service and will make adjustments to meet customer demands.

We increased our capacity to conduct research transactions online and offer virtual consultations, thus enhancing access for those unable to visit a NARA facility. Also in FY 2024, we piloted "Ask the Archives" to provide an alternative method for the public to communicate with NARA.

In FY 2024, the National Archives at Riverside, the National Archives at San Francisco, the National Archives at Boston, and two Presidential Libraries were migrated to the government-wide pay.gov solution to expedite customer orders for reproductions of our records.

NARA is focused on reducing the FOIA backlog. The Presidential Libraries have closed nearly 600 FOIA requests and received over 400 new FOIA requests. NARA's Special Access and FOIA Program closed 672 FOIA requests and received 693 new FOIA requests.



## Connect with Customers

*Connect with Customers* challenges us to continuously improve the customer experience, cultivate public participation, and generate new understanding of the importance of records in a democracy. We strive to represent the stories of all Americans in our work. We continuously engage with and learn from our customers: individuals, communities, organizations, and other Federal agencies. We build long-term and strategic customer relationships to ensure our services are valued by our customers and we work together to improve overall efficiency, engagement, and equity.

**Objective 2.1: *By FY 2026, NARA will demonstrate enhanced organizational understanding of internal and external customer wants, needs, and expectations to support the design and delivery of world-class services.***

Description of measure: NARA will develop a systematic process to collect and analyze customer feedback to continuously improve agency service offerings and better meet customer needs. NARA will routinely connect with customers, conduct consumer research, and undertake an array of engagements to understand how customers interact with multiple NARA business lines. NARA will prioritize enhancements to customer service procedures and systems based on customer insights. NARA will share the results of its customer research internally and with the public.

Understanding our customers is the cornerstone of a successful customer experience transformation. Many of NARA's public facing business lines routinely solicit feedback from customers, and those that do have improved lines of communication to share the information outside of their organization. NARA must continue to develop tools, expertise, and procedures to routinely conduct customer research and share the results across NARA business lines.

Performance summary: NARA is committed to enhancing its internal capabilities for managing customer experiences and delivering improved services by gaining a deeper understanding of our customers' desires, needs, and expectations.

NARA's service providers will receive training to ensure their readiness to consistently engage with customers and routinely solicit feedback. This will encourage the prioritization of customer insights to inform service design and enhance service delivery. Furthermore, NARA will emphasize the importance of effectively communicating discoveries and actions both internally and externally.

In FY 2024, NARA's researcher facing business lines established a mechanism for soliciting feedback from onsite researchers across NARA's Research Services organization and the Presidential libraries. Research Services held several listening sessions with the community and implemented several recommendations to improve accountability and transparency. These improvements were summarized on a new "In Person Research Experience" web page.

**Objective 2.2: *By FY 2026, NARA will modernize enterprise communication and service channels to capture customer feedback and continuously improve the customer experience.***

Description of measure: NARA will continue to develop a system to evaluate the customer experience across NARA business lines and use the results to modernize its service channels. NARA must develop a methodology to measure the customer experience, especially when the customer journey crosses multiple NARA services and service providers. Once developed, NARA will analyze the metrics to identify opportunities to better meet customer needs and expectations. NARA will continue to publish the results of its customer service approach so that customers can review the changes and assess the results.

NARA will evaluate service delivery from the customer's perspective to improve service delivery and identify trends for improvement across the enterprise. NARA will develop a consistent internal customer experience measurement methodology and collect and analyze information about the customer experience. NARA must develop the expertise to solicit customer feedback, analyze customer experience metrics, and identify and implement improvements in NARA services based on customer insights.

Performance summary: NARA's objective of systematically evaluating service delivery from the customer's perspective will be considered successful when we have the capacity to consistently assess service delivery across various customer interactions with NARA, encompassing in-person experiences, website interactions, email correspondence, and more. This achievement hinges on the establishment of a customer experience measurement framework that accommodates the diverse ways customers engage with NARA.

In FY 2024, NARA focused on developing regular tools for collecting and responding to feedback related to the on-site researcher experience. NARA used the results of these engagements to make many changes to our approach, most notably improvements were made to scheduling onsite researcher visits in the National Capital Region.

**Objective 2.3: *By FY 2026, NARA will deliver a national program of museums, education, and public programming that demonstrates leadership in equity, accessibility, and diversity.***

Description of measure: NARA is committed to increasing the diversity, equity, inclusion, and accessibility of its civic education program. NARA engages the public in civic education and discourse through a national program of museum exhibits, education, and public programs. NARA will increase the representation of underserved communities in its programming. NARA will increase its online programming and exhibits and will modify its physical infrastructure to make its civic education programs more accessible for the public.

NARA will partner with underserved communities and peer institutions to develop culturally appropriate ways to present records of importance to underserved communities. NARA must diversify its workforce and strengthen internal capabilities to develop relevant, relatable, and respectful content for museum displays and educational materials. NARA must invest in audience evaluation tools to ensure that new materials are meaningful and appropriate to a diverse body of patrons. NARA must invest in its physical infrastructure to ensure that NARA museum exhibits and on-site programs are accessible for all.

Performance summary: As the 250<sup>th</sup> anniversary of the Declaration of Independence approaches, NARA is working to ensure its public programs and events advance NARA goals for inclusivity, expanding community engagement, and enhancing historical narratives. NARA conducted research and engaged outside groups to ensure that the redesigned National Archives Museum (NAM) embraces visitors with a variety of physical, sensory, and cognitive accessibility needs. NARA also conducted extensive engagement to ensure that the exhibits in the redesigned NAM recognize the contributions of all Americans to the founding of the nation.

In FY 2024, several new museum exhibits highlighted content about underrepresented communities and aspired to reach new audiences through public programming and education outreach. Civics education programming focused on the Declaration of Independence was made available to schools nationwide for the 2024/2025 school year.

## Maximize NARA's Value to the Nation

*Maximize NARA's Value to the Nation* recognizes that public access to government information creates measurable economic value, which adds to the enduring cultural and historical value of our records. We are modernizing records management practices across the Federal government, advancing digital preservation of archival electronic records, and supporting the transition to digital government. NARA will explore new technology to find low-cost, practical solutions to improve processing, access review and redaction, and digitization, to accelerate the delivery of electronic and digitized records to the public.

### **Objective 3.1: *By FY 2026, NARA will provide policy, requirements, and oversight to support a transparent, inclusive, and fully digital government.***

Description of measure: NARA must provide its customer agencies with the policy, appraisal, and training necessary to appropriately manage records in their custody. NARA will revise the Code of Federal Regulations, Chapter 12, Subchapter B – Records Management (parts 1220-1249) to support the transition to fully electronic recordkeeping with modern records formats. NARA will continue to provide guidance as agencies digitize federal records according to NARA standards. NARA will continue to work with the General Services Administration to create solutions and services supporting federal electronic records management (ERM) requirements.

NARA must also provide its stakeholders with reasonable and independent assurance that other agencies are complying with records management laws and regulations. NARA will continue on-site inspections of other agencies' records management practices to help those agencies strengthen their record-keeping programs and ensure that records are being managed appropriately. NARA will provide greater public access to information NARA collects about other agencies' records management programs. NARA strives to provide initial responses to agency records management questions within three days of receipt.

Performance summary: Following the success of issuing regulations with digitization standards for paper records in FY 2023, NARA provided [additional resources](#) to help agencies implement the new digitization requirements, including a Quality Management Guide and FAQ on Non-Compliant Digitized Permanent Records. NARA continues working on additional regulations with digitization standards for film records that will be issued in FY 2025. NARA worked with GSA to identify vendors capable of meeting the records digitization requirements. Vendors that self-certify they can meet the digitization requirements and standards for temporary and permanent records are listed under a new Special Item Number (SIN) Subgroup under [518210DC: "NARA-Compliant Digitization Services for Federal Records."](#) NARA is modernizing its approach by developing records management guidance for modern records formats. NARA issued guidance on records created on collaboration platforms at the end of FY 2023. NARA continued to work with GSA through the Interagency Collaboration Group and the federal mobility group to raise records management awareness and provide guidance to agencies with regards to records created and maintained on collaboration platforms.

In FY 2024, NARA continued to explore ways to expand web archiving for all federal agency websites. In FY 2024, NARA began an analysis on social media records to identify archival and records management issues, explore technical challenges, and outline NARA's ability to accession and preserve social media records.

In FY 2024, NARA completed its exploration of approaches and solutions for the implementation of a public dashboard, to transparently report on records management issues across the federal government. NARA will continue moving towards implementing the dashboard in FY 2025.

**Objective 3.2: *By 2026, NARA will reduce the time it takes to start complex Freedom of Information Act (FOIA) requests for unclassified records.***

Description of measure: NARA is committed to reducing the length of time that members of the public must wait to receive responses to Freedom of Information Act (FOIA) requests for NARA records. NARA receives FOIA requests for the internal records created during NARA business as well as requests for records from among the five million cubic feet of archival records that NARA holds on behalf of the American people. In many cases, FOIA requests are the only way that members of the public can access records that contain personally identifiable information (PII) or are otherwise not available to the public.

NARA responds to most FOIA requests within the statutory 20 days. However, NARA's most complex FOIA requests can take as long as eight years before NARA can begin reviewing responsive records. NARA's most complex FOIA requests seek access to large volumes of Presidential and federal records containing highly sensitive information, which require NARA to review and redact millions of pages of records, line-by-line. NARA must modernize its business processes and workflows for managing FOIA responses and deploy new tools and additional staff to increase the volume of records reviewed to reduce the cycle time for responding to complex FOIA requests. NARA will also improve business processes to accelerate the appropriate declassification and public release of classified records.

<b>Performance Measure</b>	<b>Year</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
Number of pages of paper records digitized at Clinton Library. (Final target 70M) (cumulative)	<i>Target</i>	—	—	10M	30M
	<i>Actual</i>	—	4.7M	4.9M	5.2M
Number of pages of paper records digitized at Bush 43 Library. (Final target 50M) (cumulative)	<i>Target</i>	—	—	10M	30M
	<i>Actual</i>	—	—	281K	298K

Performance summary: NARA's primary approach to modernizing the FOIA process is to digitize analog records to permit electronic search and processing and to explore, acquire, and apply modern technologies, such as artificial intelligence and machine learning (AI/ML), to expedite processing and response. In FY 2024, NARA began the digitization of analog records of former President Barack H. Obama.

**Objective 3.3: By 2026, NARA will advance existing physical and intellectual controls for the agency’s holdings to enable digital preservation risk planning and risk mitigation in a trustworthy repository and ongoing access to electronic records.**

Description of measure: NARA must have a comprehensive system in place to assess the preservation risk of record holdings and take action to mitigate that risk so that NARA records — in traditional (analog), digitized, and born-electronic formats — are protected and remain available to the public in perpetuity. NARA must have preservation risk assessments and risk mitigation strategies in place to demonstrate that NARA is a trustworthy repository and a reliable source for archival records of the federal government. NARA has already established expertise in preserving records in traditional (analog) formats and is committed to the continued preservation of these records as well. NARA has created a digital preservation framework that established a comprehensive plan for preserving NARA’s electronic and digitized records; however, NARA requires additional investment to implement risk assessments and risk mitigation strategies for these records.

NARA must take additional actions to provide reasonable assurance that the more than one petabyte of electronic and digitized archival records in NARA custody are protected and will be preserved in perpetuity. NARA must develop a technical infrastructure for risk assessment, including tools for file format, characterization and transformation, data integrity, format and media sustainability, and information security. One of NARA’s greatest challenges relating to electronic records is the volume of records that must be preserved. NARA must develop automated tools to detect risk and apply preservation actions automatically over extremely large volumes of electronic records.

<b>Performance Measure</b>	<b>Year</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
File Format & MIME Types successfully identified for ERA 2.0 (cumulative)	<i>Target</i>	—	—	—	10%
	<i>Actual</i>	—	—	—	0
Digital content managed in ERA 2.0 (in TBs)	<i>Target</i>	—	100	150	225
	<i>Actual</i>	100	103	108	130
Numbers of files managed in ERA 2.0 (in millions)	<i>Target</i>	—	—	30	45
	<i>Actual</i>	18.4	18.5	19.3	21

Performance summary: ERA 2.0 engages records managers across the Federal government in modern, electronic recordkeeping by allowing them to manage their records schedules and transfer requests while also serving as the primary digital repository for NARA’s born-electronic and digitized records. While the records scheduling and transfer request forms and workflow component is in broad use across the Federal government, progress in ingesting records into the system has been slowed by constraints in the system’s capabilities to upload and process records in a scalable manner.

Despite the slow progress in ingesting records into the system NARA has successfully implemented interim, cloud-based storage where more than 80 million files comprising nearly 2,000 TB, have been staged by NARA staff in preparation for ingest in ERA 2.0.

In FY 2024, NARA digital preservation efforts focused on continued refinement of the agency's digital preservation framework. NARA has plans to develop automated tools to provide a second instance of ERA 2.0 in an alternative Cloud service provider. NARA already maintains multiple back-up copies in different geographic regions of its current Cloud provider; however, NARA plans to establish continuous back-ups in a second service provider to provide even greater assurances that electronic archival records will be available in perpetuity.

## Build our Future through our People

*Build our Future through our People* is our commitment to provide all our employees with learning and leadership opportunities necessary to successfully transition to a digital environment, support career development, and thrive in an inclusive, supportive, and diverse work environment. We are dedicated to building a respectful, inclusive, and safe workplace so that all employees are empowered, engaged, and prepared to become the next generation of leaders. We are building relationships with underserved communities, educational institutions, and professional organizations to develop new recruitment pipelines to attract and retain a diverse workforce with the skills necessary to fulfill our mission.

**Objective 4.1: *By FY 2026, NARA will increase the frequency of effective coaching that employees receive by 50 percent to improve performance, retention, and relationships across the organization.***

Description of measure: NARA must have a cadre of skilled leaders in both supervisory and non-supervisory positions to fulfill the agency’s mission and effectively transition to a fully electronic environment. Effective coaching is a critical success factor in building a workplace culture of strong organizational and individual performance, employee development, and working relationships that instill a sense of pride and inclusiveness. NARA invests in leadership development activities to ensure the agency has a diverse pool of competent leaders with appropriate technical skills and experience.

<b>Performance Measure</b>	<b>Year</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
Annual increase the agency-wide average frequency of coaching above baseline	<i>Target</i>	—	Baseline	12.5%	25%
	<i>Actual</i>	—	3.5%	TBD**	TBD**
Provide training opportunities in effective coaching for new supervisors. (cumulative)	<i>Target</i>	—	70%	85%	90%
	<i>Actual</i>	—	88%	87%	89%
Provide training opportunities in effective coaching for all supervisors and team leads. (cumulative)	<i>Target</i>	—	Baseline	10%	30%
	<i>Actual</i>	—	6.6%	6%	18%
Provide internal and external individual and group coaching services to employees at all grade levels. (cumulative)	<i>Target</i>	—	1%	5%	10%
	<i>Actual</i>	—	1.2%	1.7%	17.5%

\*\* *The measurement methodology is under development.*

Performance summary: During FY 2024, NARA offered group coaching and individual coaching opportunities for all employees, including NARA’s Executives. NARA has also incorporated coaching into its Supervisors’ Development Program to ensure that all new supervisors receive



coaching and are trained in coaching skills. In FY 2024, NARA transitioned group coaching into an evidence-based model of wellbeing. NARA also partnered with the IRS to offer individual coaching opportunities for all employees and developed a methodology to evaluate coaching effectiveness.

**Objective 4.2: *By FY 2026, NARA will increase the diversity of employees in mission critical occupations for GS-12 and above positions to mirror the Civilian Labor Force (CLF).***

Description of measure: NARA must have a highly qualified, motivated, and diverse workforce to achieve the agency’s strategic goals and objectives. Workplace diversity is proven to offer employees a better sense of community, increase employee engagement, and a more positive workplace culture. In addition, a more diverse workforce is more resilient and agile, which are critical characteristics that will help NARA to transition to a fully electronic government.

NARA’s workforce is generally very diverse in total; however, mission critical occupations such as archivist and archives specialist are less diverse at higher grade levels. NARA will address these gaps with recruitment and internal promotion strategies. To develop new recruitment pipelines, NARA will build new relationships with educational institutions and professional organizations that represent underserved communities. NARA will also leverage technology platforms to expand the scope of recruitment activities. NARA will also explore available hiring flexibilities to provide hiring managers with expedited options to hire qualified candidates for entry level, journey level, and senior positions in the agency.

<b>Performance Measure</b>	<b>Year</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
Increase the diversity of employees in mission critical occupations for GS-12 and above positions to mirror the Civilian Labor Force (CLF).	<i>Target</i>	—	—	Baseline	25% of CLF
	<i>Actual</i>	—	—	—	**TBD
Conduct virtual job fairs (annual)	<i>Target</i>	—	2	2	2
	<i>Actual</i>	—	—	2	7

**\*\* The measurement methodology is under development.**

Performance summary: In FY 2024, NARA established a centralized Voluntary Internship Program. This program has already yielded tremendous results as NARA hosted a diverse pool of 42 interns during the summer of 2024 and plans to host approximately 30 more interns in the fall of 2024. NARA has also reestablished the Pathways Program. Multiple Pathways employees were hired in FY 2024 and at least one Pathways employee has been converted to career-conditional status.

In FY 2024, NARA successfully established meaningful relationships with dozens of Historically Black Colleges and Universities (HBCU) and Hispanic Serving Institutions (HSI). In addition, NARA has established relationships with organizations such as Hiring Our Heroes, Peace Corps, Loyola University, John Hopkins University, and many others. NARA has also invested

time and resources into technological platforms such as Linked In and Handshake in an effort to expand our reach and brand identity. Throughout FY 2024, NARA managers and supervisors received multiple trainings on special hiring authorities, including but not limited to Schedule A, Direct-Hire Authority, Veterans Employment Opportunity Authority (VEOA), and Veterans Recruitment Appointment Authority (VRA).

In FY 2025 and FY 2026, NARA will expand its internship programs and build on its use of the Pathways Program. NARA will continue to develop and enhance its Voluntary Internship Program by expanding strategic outreach to candidates and throughout the organization. Specifically, NARA will focus on educating management on opportunities to fill vacancies with recent graduates in the Pathways Program. In FY 2026, NARA plans to explore the implementation of a fellowship program that targets highly accomplished college students.

**Objective 4.3: By FY 2026, NARA will increase the percentage of employees who believe they have similar access to career advancement opportunities as other, similarly-situated employees to 70 percent.**

Description of measure: NARA employees must see reasonable and achievable paths to rewarding and productive careers to engage in their work and build an inclusive workplace. NARA must provide employees with a roadmap that allows them to plan their careers, as well as training and experiential learning opportunities to develop skills needed for career progression. NARA must establish an equitable method to cultivate qualified internal candidates for future vacancies and leadership pipelines for succession planning.

NARA will analyze qualifications and competencies needed for NARA positions in all job series. NARA will assess career ladders to ensure that all employees have real opportunities for advancement. NARA will review vacancy announcements to ensure that competencies are appropriately captured and communicated, and that educational requirements are not required if the necessary competencies can be demonstrated through experience. NARA will develop new training and certification opportunities so that employees can demonstrate mastery of required competencies. NARA will expand leadership training to non-supervisors to allow motivated employees opportunities to prepare for future responsibilities and self-identify for inclusion in leadership pipelines for succession planning.

NARA's long-term goal is to increase the percentage of employees who respond "agree" or "strongly agree" to this question in the annual Federal Employee Viewpoint Survey (FEVS): "I have similar access to advancement opportunities (e.g., promotion, career development, training) as others in my work unit."

<i>Performance Measure</i>	<i>Year</i>	<i>2021</i>	<i>2022</i>	<i>2023</i>	<i>2024</i>
Employees believe they have similar access to career advancement opportunities as others in their work unit	<i>Target</i>	--	Baseline	68%	68%
	<i>Actual</i>	--	68%	66%	70%

Performance summary: In 2024, the Office of Human Capital developed mentoring opportunities for all employees, coupled with a Career Exploration opportunity designed to help employees gain exposure and support for career advancement. The Office of Human Capital also launched a series of webinars to help employees connect and learn about career advancement skills, including priority management, applying for federal positions, a federal hiring Q&A, investing in career success, creating an Individual Development Plan, engaging in difficult conversations, leading from where you are, and a women in leadership forum. NARA is deferring the creation of skill maps until after the agency completes revisions to standardized position descriptions and staffing plans, and digital skill priorities are identified.

Over the next four years, we anticipate continuing the mentoring and career exploration opportunities by connecting these opportunities to other interventions to help the agency move into a digital future. These interventions include a focus on digital workforce hiring initiatives and standardized position description updates to include digital skills based on feedback from digital workforce working groups. The agency will continue to invest in training and experiential opportunities, including support for essential and leadership skills development in a cohort-based development program. This program will expand developmental opportunities across the entire workforce from entry to mid-level and beyond.

**Objective 4.4: *By FY 2026, NARA will foster a culture that encourages civil interaction, equity, and inclusion that allows employees to feel connected to the agency's mission and contribute to their full potential.***

Description of measure: NARA must provide all employees with a safe and supportive, equitable, and inclusive work environment. NARA is committed to the fair treatment of employees. NARA promotes collaborative, civil interactions and has established expectations for civility in the workplace.

NARA will create a workplace culture that is diverse, inclusive, respectful, and welcoming for all employees. NARA will continue to provide visible leadership support for workplace culture programs. NARA will promote education and training that foster a culture of excellence. NARA will partner with its employee Union to develop new working groups and other opportunities for employees to participate in agency decision-making.

NARA's long-term goal is to increase the agency's aggregate score in four DEIA Indices calculated by the Office of Personnel Management (OPM) using survey results from the annual Federal Employee Viewpoint Survey (FEVS).

<b>Performance Measure</b>	<b>Year</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
OPM DEIA: Diversity Index	<i>Target</i>	--	Baseline	73%	73%
	<i>Actual</i>	--	73%	71%	72%
OPM DEIA: Equity Index	<i>Target</i>	--	Baseline	70%	70%
	<i>Actual</i>	--	70%	69%	72%
OPM DEIA: Inclusion Index	<i>Target</i>	--	Baseline	76%	76%
	<i>Actual</i>	--	76%	76%	77%
OPM DEIA: Accessibility Index	<i>Target</i>	--	Baseline	74%	74%
	<i>Actual</i>	--	74%	71%	69%

Performance summary: In FY 2024, NARA continued deployment of the Respectful, Inclusive, and Safe Environments (RISE) training program to its staff. RISE is a collaborative program originally made available to NARA through a partnership with OPM and the US Agency for International Development. This year, approximately 40 volunteers from across the agency participated in the program as facilitators (trainers), delivering the RISE curriculum to over 400 NARA employees in 42 work units.

NARA instituted several major program enhancements, including updating the core curriculum in response to participant feedback; creating a training and certification process for volunteer facilitators; and developing an in-person program track (Local RISE) to supplement the existing virtual offering (Virtual RISE). In FY 2025, NARA will continue to train employees through the RISE curriculum. NARA also plans to begin introducing additional training modules to supplement the existing core curriculum.

In FY 2024, we also completed NARA's first data study targeted towards creating a more equitable workplace. The team assessed data on employee discipline at NARA from approximately FY 2021 to FY 2023, identifying various disparities in discipline rates. To better understand the data, the team surveyed and conducted focus groups with supervisors across the agency. Based on this analysis, the team identified 13 recommendations for potential improvements and enhancements to NARA's employee discipline process, including opportunities for additional training and guidance as well as opportunities to improve transparency and communication.

## Federal Records Management Programs

This section reports on the annual results of NARA's records management activities in compliance with [44 U.S.C §2904\(c\)\(8\)](#).

### OMB/NARA Memorandum, Transition to Electronic Records (M-23-07)

In December 2022, OMB and NARA issued the joint memorandum M-23-07, Update to Transition to Electronic Records. This memorandum directed all federal agencies to ensure that federal records are created, retained, and managed in electronic formats, with appropriate metadata, by June 30, 2024. The memo and deadline were strong drivers in FY 2024 as NARA and agencies worked to meet these goals, including transferring permanent records to the National Archives or to the Federal Records Centers before the deadline.

### M-23-07 Exceptions

NARA provided agencies with guidance on submitting exception requests if they could not meet the deadline. Since the initial publication of M-19-21, a total of 59 exception requests have been received, with 39 processed in FY 2024. Thirty-three agencies were granted limited exceptions, contingent on annual reporting requirements, while 19 requests were either deemed unnecessary or returned with a request for additional justification.

NARA worked closely with OPM to issue a joint bulletin providing a government-wide exception for federal agencies to send official personnel folders and electronic medical folders to the National Personnel Records Center. This exception gave more time to OPM and agencies to completely transition to fully digital personnel records management,

### Records Management Oversight and Reporting

NARA's [Oversight and Reporting web pages](#) provide comprehensive information about federal records management oversight activities. In FY 2024, NARA conducted the following oversight projects:

- **Federal Agency Records Management (FARM) Annual Report.** In 2024, NARA required three submissions for 2023 federal agency records management programs and activities:
  - Senior Agency Official for Records Management Reports
  - Records Management Self-Assessment
  - Federal Electronic Records and Email Management Maturity Reports.

NARA reviewed the submissions and issued a [consolidated report](#) with analysis on the state of federal records management programs. While agencies have been making

progress towards the goals in M-23-07, many agencies (32%) reported they would not meet the June 30 deadline.

- **Records management inspections.** NARA inspects the records management programs of federal agencies under the authority of 44 U.S.C §2904(c)(7) and §2906. Inspection reports are available on the [Records Management Inspections website](#).

In FY 2024, NARA completed inspections of the following agencies and topics:

- Department of the Interior Management of Indian Affairs Records within Selected Offices and Bureaus: Multi-Agency Records Management Report
  - Records Management Practices of Legislative Agencies: Multi-Agency Inspection Report
  - Department of Transportation/Federal Aviation Administration Records Management Program
- **Monitoring and follow-up.** Following the issuance of final inspection reports, NARA requires agencies to prepare corrective action plans with measurable action items and milestones. NARA monitors progress through agency-submitted progress reports until all actions are completed. During FY 2024, NARA tracked 637 individual recommendations and 208 of those recommendations were closed.
  - **Records management assessments.** An assessment is an evaluation of a specific records management topic, issue, or activity affecting RM processes, procedures and policies. Assessments are useful for both NARA and federal agencies to evaluate records management practices and inform guidance, policy, training, and tools. In FY 2024, NARA completed an assessment report on Unauthorized Disposition Safeguards. Assessment reports are available on the [Records Management Assessments website](#).
  - **Alleged Unauthorized Disposition of Federal Records.** Under 44 U.S.C. §3106 and 36 CFR §1230, federal agencies are required to notify NARA of any alleged unauthorized disposition of the agency's records. NARA also receives notifications from other sources such as the news media and private citizens. NARA tracks each allegation and communicates with the agency until the issue is resolved. To support transparency and open government-specific information about each case, including the findings of alleged unauthorized disposition of federal records, information is available on NARA's [Unauthorized Disposition of Federal Records](#) website. In FY 2024, NARA opened over 70 Unauthorized Disposition cases and closed over 80. Several of the cases were high profile and generated interest from Congress, special interest groups, the public, and the press.

## NARA Records Management Training for Agencies

NARA offers free, online records management training resources to support federal agencies staff in understanding and accomplishing their work in managing federal records and information.

- **Agency Records Officer Credential (AROC).** In FY 2024, NARA's Records Management Training Program continued to leverage online learning technology to provide agency records officers with the Agency Records Officer Credential (AROC). In FY 2024, 79 agency records officers (AROs) were enrolled in the AROC program. NARA training staff were designated as mentors to assist each agency records officer working through the AROC curriculum. NARA support also included weekly sessions to address any questions on assignments and key concepts. The AROC was awarded to 28 AROs in FY 2024. Of those who participated in the training and received their credential, 99 percent of participants were "satisfied" or "strongly satisfied" with their experience. One hundred percent of those who received their credential and used an AROC mentor throughout the process reported a positive experience.
- **NARA's Records Management Instruction Support (ReMIS).** NARA ReMIS services provided the customized eLearning course RM Fundamentals for agencies to train their staff. In FY 2024, ReMIS completed 38 individual requests from 20 agencies. Seventeen of the agencies previously used ReMIS services. NARA developed and delivered 12 versions of RM Fundamentals to agencies for training their staff.
- **Online training resources.** NARA also increased role-based training materials for records custodians, records liaisons, and agency records officers. These materials are available on the [Records Management Training Program website](#).

## Scheduling and Appraisal Guidance

In FY 2024, NARA completely revised the [Guide to Inventorying, Scheduling, and Disposition of Federal Records](#). The new guide provides updated guidance focused on inventorying, scheduling, appraising, and disposition of records in a digital recordkeeping environment. It also includes a new guide to assist agencies in writing machine-implementable record schedules to aid in the automation of records management.

## Machine-readable General Records Schedules

Since March 2022, NARA has been working to translate the General Records Schedules into a machine-implementable format to help agencies move towards automated records management. In FY 2024, NARA issued General Records Schedule (GRS) Transmittal 35, which included updates of eleven GRS items to make them machine-implementable. With this update, 84 percent of the 304 GRS items are machine-implementable.

## Records Management Regulations

NARA continued work on its long-term comprehensive update to the entire 36 CFR Subchapter B, Records Management, to focus on requirements underpinning fully digital records management. The update consolidates the 19 current parts in the CFR to five parts. Two of the five parts (1220 and 1240) have progressed substantially and are moving forward for executive review in FY 2025. In FY 2025, work will continue on additional edits and internal review for four of the five parts.

During FY 2024, NARA completed three specific regulatory packages: 36 CFR part 1225 GAO Schedule Concurrence, 36 CFR part 1237 Digitizing Audiovisual Materials, and 36 CFR part 1236 subpart D. Looking ahead to FY 2025, NARA is actively advancing three additional regulations to support the transition to modern records management: film digitization standards under 36 CFR 1236 subpart E, rescheduling records in 36 CFR part 1225, and aligning regulations for transferring personnel records in 36 CFR part 1233 with the goals of the memo.

**FERMI.** In FY 2024, NARA's Federal Electronic Records Modernization Initiative (FERMI) continued to serve as a comprehensive government-wide strategy for procuring records management solutions and services. This project includes serving as the Electronic Records Management Standards lead on GSA's Business Standards Council. As the standards lead for Electronic Records Management (ERM), NARA provided an annual update to the ERM component of the Federal Integrated Business Framework (FIBF). This work involved meeting with stakeholder communities and providing feedback for the annual update. The FIBF is integral to incorporating federal requirements into shared services used across federal agencies.

**Digitization Standards.** In FY 2024, NARA's regulation work continued with the development of digitization standards for film records. NARA partnered with GSA to establish a new Subgroup under [SIN 518210DC: NARA-Compliant Digitization Services for Federal Records](#) to identify vendors who can self-certify that they can provide services that meet NARA's digitization standards. In addition, NARA developed the [Digitization of Federal Records webpage](#) to provide agencies quick access to digitization resources, including regulations, guidance products, digitization services, transfer information for digital records, and communications.

NARA also issued a [Frequently Asked Questions \(FAQ\) about Non-Compliant Permanent Digitized Records](#). The FAQ answers questions about non-compliant digitized records that were created before the regulations were issued and explains options that agencies may follow when they are assessing how to proceed when they have records that were digitized before the regulations were issued. NARA's records management standards team continues to dedicate significant resources to answering agency questions related to digitization as agencies implement the standards.

**Records Management Standards.** NARA actively contributes to the development of digital records management standards, including federal and international standards, to support the



transition to digital records management. In FY 2024, NARA staff participated in the International Organization for Standardization (ISO) technical committees TC 46/SC 11 (archives/records management) and TC 46 WG 13 (information governance). NARA staff held several roles in TC 46/SC 11. NARA served in leadership roles on the advisory group on strategic directions and on the advisory group and planning task force. NARA holds the role of project leader for the working group, developing a technical specification for a records management capability assessment model and as convenor for an ad hoc group on digital preservation. NARA also served as experts on several working groups.

**Document Standards (PDF).** In FY 2024, NARA staff served on ISO TC 171 (document management applications). NARA staff served as the convenor for the working group on the development of the PDF/A (archiving) standards and as technical experts on the working groups for the PDF standard; PDF/E (engineering) standard; PDF/UA for universal accessibility; EAPDF for email; file format guidelines; electronic document management (EDMS) guidelines; and metadata. NARA staff participated in the TC 42 joint working group 26 (imaging system capability qualification for archival recording and approval).

### **Records Management Outreach**

NARA conducts outreach in a variety of ways to engage and support the federal records management community as well as related information management groups.

- **Outreach Events.** NARA's primary outreach activity for the federal records management community is the [Bimonthly Records and Information Discussion Group](#) (BRIDG) meeting streamed live on YouTube. BRIDG meetings inform agencies of news from the federal records centers program as well as updates on federal records management reporting, policy, scheduling, and training. In FY 2024, NARA hosted five BRIDG meetings. Additionally, NARA hosted six meetings of the federal records management council, an interagency council that provides input, advice, and recommendations to NARA on records management policy and guidance. NARA hosted an in-person records management meeting for senior agency officials. The more than 140 attendees discussed emerging issues and executive support.
- With the publication of the permanent records digitization standards, NARA hosted four open office hours for agencies to pose questions and have answers provided by NARA experts. Additionally, NARA partnered with GSA to host an industry day for vendors along with an open office hour to answer questions raised by vendors self-certifying for special item number (SIN) 518210ERM for Electronic Records Management (ERM) solutions.
- **External Engagement.** In FY 2024, NARA participated in over 40 outreach events, including speaking at conferences hosted by professional organizations and workshops hosted by media and vendor groups. These presentations communicated the importance of transitioning to a fully digital government and electronic records management as well

as highlighting the bulletins NARA issued in 2024 and the updated digitization regulations for permanent records.

- **Microsoft Engagement.** During FY 2024, NARA continued to manage a Microsoft 365 user community of nearly 600 agency records and information staff. NARA hosted monthly meetings that included presentations from agency experts as well as Microsoft experts. The success of this engagement has led to several resources for agencies looking to implement electronic records management within the Microsoft 365 platform.