



2024 Senior Agency Official for Records Management Annual Report

The National Archives and Records Administration (NARA) requires Senior Agency Officials for Records Management (SAORM) to provide an annual report demonstrating how agencies are handling important records management initiatives as identified by NARA.

NARA uses the reports to

- determine the overall progress of the federal government in managing its records and the transition away from paper to digital formats
- to identify best practices and model solutions within federal agencies

On December 23, 2022, OMB and NARA issued a memorandum, *Update to Transition to Electronic Records* ([M-23-07](#)) that reinforced the goals in [M-19-21](#) and extended the 2022 deadlines to June 30, 2024. It is critical that Federal agencies move beyond paper-based processes and embrace the opportunities afforded to improve Government by transitioning fully to an electronic environment.

This year's SAORM report provides an opportunity for agencies to report on their progress towards electronic recordkeeping under these requirements, as well as other important records management initiatives.

The reporting period begins on January 13, 2025, and reports are due back to NARA no later than March 14, 2025.

NARA will post your 2024 SAORM report on the [NARA website](#) upon receipt. Please ensure that your agency's report is a publicly releasable version. This action is in the interest of transparency in government and to promote collaboration and communication among agencies.

NARA intends to list any non-responding agencies in a summary report on our website.

Instructions for Reporting:

- This template covers records management program developments, including those related to the transition to electronic recordkeeping as required by M-19-21 and M-23-07.
- Please be brief and precise in your answers. Limit answers to each question to no more than 500 words.
- Please complete the questions/items below and send the report to rmsselfassessment@nara.gov. Include the words “2024 SAORM Annual Report - [Agency Name]” in the subject line of the email.
- If you are responsible for records management in multiple agencies, components, or bureaus, please determine how you will submit reports to NARA. While NARA prefers a comprehensive report, you may submit separate reports for each component.

NARA may follow up with agencies to obtain additional information and/or documentation related to responses provided in the template.

Please provide the following information (required):

- Name of SAORM: [John Mateja](#)
- Position title: [President](#)

1. What agencies, bureaus, components, or offices are covered by this report and your position as SAORM, and which will be reporting separately?

Please provide a list and indicate any that are new or have been changed due to reorganization or other circumstances.

[This report covers The Barry Goldwater Scholarship and Excellence in Education Foundation \(BGSF\). There are no other offices reporting separately nor any reorganizations to report.](#)

2. Did your agency meet the goal to manage all permanent records in an electronic format to the fullest extent possible for eventual transfer and accessioning by June 30, 2024? (M-19-21, 1.2 and M-23-07, and 1.1)

- Yes
 No
 Not applicable, all records were already in electronic format

If No, why not? (Include if you already submitted, or will still be submitting an exception request and/or details of specific challenges your agency had in meeting the goal.)

As of 2020, BGSF creates, manages, and preserves all new permanent records electronically. Although some permanent records created prior to 2020 are managed and preserved electronically, most permanent historical records, many of which are still referenced as part of normal mission operations, still need to be converted into a digital format. We have been diligently working over the last few years to digitize these files. We have reviewed and prepared the paper records and have brought down our total boxes of records to be scanned from 16 to 4. With the addition of our new employee, bringing the staff to 3 in total for the agency, this digitization will be completed by the end of fiscal year 2025.

3. Did your agency meet the goal to manage and preserve all temporary records in an electronic format by June 30, 2024? (M-19-21, 1.3 and M-23-07, 1.3)

- Yes
- No
- Not applicable, all records were already in electronic format

If No, why not? (Include if you already submitted, or will still be submitting an exception request and/or details of specific challenges your agency had in meeting the goal.)

BGSF maintains electronic copies of all temporary records from 2019 forward. In addition, temporary scholar records from 2014-2018 are electronic, leaving only a small portion of temporary paper records. All temporary paper records are stored on site until destruction. BGSF is working on the digitization of the remaining temporary records. BGSF did not submit an exception to policy last year. The goal is to have all records digitized before the end of the calendar year 2025.

4. Did your agency meet the requirements of M-19-21, 1.3 and M-23-07, 1.3 to close agency-operated records storage facilities by June 30, 2024? (Choose all that apply)

- Yes
- No
- Not applicable, my agency did not have agency-operated records storage facilities
- Not applicable, all records were already in electronic format

If No, why not? (Include if you already submitted, or will still be submitting an exception request and/or details of specific challenges your agency had in meeting the goal.)

5. Did your agency meet the requirements of M-19-21, 1.3 and M-23-07, 1.3 to transfer inactive, temporary analog records to NARA Federal Records Centers (FRC) or commercial storage facilities by June 30, 2024? (Choose all that apply)

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- Yes, we transferred the records to the FRC
 - Yes, we transferred the records to commercial storage facilities
 - No
 - Not applicable, all records were already in electronic format

If No, why not? (Include if you already submitted, or will still be submitting an exception request and/or details of specific challenges your agency had in meeting the goal.)

Not Applicable: The Goldwater Foundation does not have any agency-operated records centers, nor does it use any record storage facilities. All temporary/inactive records are stored on site until destruction in accordance with approved records schedules.

6. Are you supporting the implementation and closure of any corrective actions that resulted from a finding and recommendation documented in a NARA inspection or assessment of your agency's RM program?

- Yes
- No
- Not applicable, my agency is not under a plan of corrective action

If Yes, please explain how you are supporting the implementation and closure of the corrective actions. If No, why not?

The Foundation received corrective action in 2022 and we are still currently working those actions. Most of those actions are around a records inventory and digitization of records.

7. Are you advocating for the agency's records management program and ensuring that it documents the organization's activities and decisions by participating in meetings and working groups dedicated to improving records management in your agency?

- Yes
- No

If Yes, please explain how. If No, why not?

As a two person agency, our bandwidth is stretched thin, and we have not been able to participate in extra meetings or working groups to improve our records management practices. With the recent addition of a third employee, our bandwidth will increase, and we will be able to dedicate more time to improving our records management practices.

8. Are you ensuring the agency protects records against unauthorized disposition (e.g., destruction, deletion, alteration, removal, or loss) as defined in NARA regulations and guidance?

Yes

No

If Yes, please explain how. If No, why not?

Yes, the Foundation staff prioritizes the protection of all records. Disposition schedules are noted on electronic files and paper files are individually reviewed and kept in a locked location to avoid any unauthorized dispositions,

9. Is there specific policy or guidance you need from NARA to support the strategic direction of your records management program?

Yes

No

Please explain your response and include any comments on existing, pending, and future topics.

BGSF does not have a request for any specific policy or guidance at this time.