

OFFICE OF THE GOVERNOR
ADMINISTRATION
EXECUTIVE MANSION

Program Records Retention and Disposition Schedule

The Program Records Retention and Disposition Schedule and retention periods governing the records series listed herein are hereby approved. In accordance with the provisions of Chapters 121 and 132 of the General Statutes of North Carolina, it is agreed that the records of the

EXECUTIVE MANSION

do not and will not have further official use or value for administrative, research, or reference purposes after the respective retention periods specified herein. The N.C. Department of Cultural Resources consents to the destruction or other disposition of these records in accordance with the retention and disposition instructions specified in this schedule. However, records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule.

The Office of the Governor and the Department of Cultural Resources agree that certain records series have minimal administrative, reference, or historical value. When the custodian of any official State records certifies to the Department of Cultural Resources that such records have no further use or value for official and administrative business and when the Department certifies that such records appear to have no further use or value for research or reference, then such records may be destroyed or otherwise disposed of by the agency having custody of them. As part of its program operations the Office of the Governor agrees to establish and enforce internal policies that will be approved by the Department of Cultural Resources. The policy will specify how long those records must be retained, and when they must be destroyed.

E-mail messages sent or received by Executive Branch agencies shall be retained for 10 years pursuant to Executive Order No. 18 (issued July 7, 2009 by Governor Beverly Perdue) and as set forth in G1 of the General Schedule for State Agency Records. Any E-mail messages requiring retention longer than 10 years, including those with permanent historical value, shall be designated with specific retention periods in this program records schedule. Public records including electronic records not listed in this schedule or in the *General Schedule for State Agency Records* are not authorized to be destroyed. The

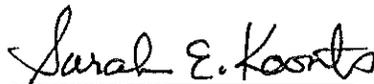
EXECUTIVE MANSION

agrees to destroy, transfer or dispose of records in the manner and at the times specified herein. This schedule is to remain in effect until superseded.

APPROVAL RECOMMENDED


Amy Blinson, Chief Records Officer
Office of the Governor


Julia Lee, Executive Assistant to First Gentleman
Office of the Governor


Sarah E. Koonts, Director
Division of Historical Resources

APPROVED


Beverly Eaves Perdue
Governor


Linda A. Carlisle, Secretary
Department of Cultural Resources

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EXECUTIVE MANSION

ITEM 48694. FIRST SPOUSE EXECUTIVE ASSISTANT'S CORRESPONDENCE FILE.

Records in paper and electronic formats, including email, concerning goals and objectives. File may include memoranda and correspondence received from and written to other officials, staff, the general public, and state and federal agencies concerning the administration and management of the section, and other related records.

DISPOSITION INSTRUCTION: Transfer paper and electronic records, including email, to the State Records Center after 4 years, but no later than the end of the Governor's administration, for immediate transfer to the custody of the Archives. Contact the Electronic Records Branch prior to the transfer of any electronic records.

ITEM 48695. MANSION EVENTS FILE. Records in paper and electronic formats, including email, concerning group and non-profit organization events held at the mansion that may not include the attendance of the Governor or First Spouse. File includes notes, listing of guests, RSVPs and menus. Notes may include identifying information about the groups and organizations and significance of using the mansion.

DISPOSITION INSTRUCTIONS: Transfer paper and electronic records, including email, after 4 years, but no later than the end of the Governor's administration, to the State Records Center for immediate transfer to the custody of the Archives. Contact the Electronic Records Branch prior to the transfer of electronic records.

ITEM 34568. EXECUTIVE MANSION CORRESPONDENCE FILE. Correspondence in paper and electronic formats, including email, sent to and received by staff members of the Executive Mansion.

DISPOSITION INSTRUCTIONS: Transfer paper and electronic records, including email, after 4 years, but no later than the end of the Governor's administration, to the State Records Center for immediate transfer to the custody of the Archives. Contact the Electronic Records Branch at the Government Records Branch prior to the transfer of electronic records.

ITEM 34951. FIRST SPOUSE'S INITIATIVES FILE. Records in paper and electronic formats, including email, concerning initiatives of North Carolina's First Spouse. File includes newspaper clippings, photographs of the First Spouse, newsletters, and correspondence.

DISPOSITION INSTRUCTIONS: Transfer paper and electronic records after 4 years but no later than the end of the Governor's administration, to the State Records Center for immediate transfer to the custody of the Archives. Contact the Electronic Records Branch prior to the transfer of electronic records.

OFFICE OF THE GOVERNOR
ADMINISTRATION
EXECUTIVE MANSION

ITEM 46010. FIRST SPOUSE'S EVENTS FILE. Records in paper and electronic formats, including email, concerning events attended by the First Spouse. File includes correspondence, invitations, checklists, lists of invitees, and other related records.

DISPOSITION INSTRUCTIONS: Transfer paper and electronic records after 4 years, but no later than the end of the Governor's administration, to the State Records Center for immediate transfer to the custody of the Archives. Contact the Electronic Records Branch prior to the transfer of electronic records.

ITEM 47976. EXECUTIVE MANSION FINE ARTS COMMITTEE MINUTES FILE. Records concerning meetings of the Executive Mansion Fine Arts Committee, which advises the Department of Cultural Resources and the Office of the Governor on the preservation needs and related issues concerning the Executive Mansion. File includes minutes of the Executive Mansion Fine Arts Committee and other related records.

DISPOSITION INSTRUCTIONS: Transfer minutes and related records when reference value ends, but no later than the end of the Governor's administration, to the State Records Center for immediate transfer to the custody of the Archives. See also Item 47710, Department of Cultural Resources, Office of the Secretary, Secretary's Office.

ITEM 34947. FIRST SPOUSE'S DONATIONS REPORTS FILE. Records in paper and electronic formats concerning listings of donations and gifts to the First Spouse. File includes any lists, if created, and correspondence.

DISPOSITION INSTRUCTIONS: Function and records transferred to the Office of the Governor, Capitol Staff.

ITEM 34950. INAUGURAL BALL FILE. Records in paper and electronic formats concerning events celebrating the inauguration of the Governor. File includes lists of invitees, descriptions of the First Spouse's attire, and copies of Inaugural Ball publications. (The Ball is sponsored by the Junior League.)

DISPOSITION INSTRUCTIONS: Print electronic records and interfile with related paper records. Destroy in office electronic versions of records which were printed and filed when reference value ends. Transfer paper records when reference value ends, but no later than the end of the Governor's administration, to the State Records Center for immediate transfer to the custody of the Archives. In accordance with Item G33 of the General Schedule for State Agency Records, transfer 10 or more copies of publications to the State Documents Clearinghouse, State Library of North Carolina.