

Schedule 27 - Records of the Chief Information Officer

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Introduction

This schedule provides disposal authorization for certain records created and maintained by Federal Chief Information Officers (CIO) and their program offices. This schedule applies to the records of CIOs at agency or departmental headquarters as well as those of deputy and subordinate CIOs at the bureau or field office level. This schedule does not apply to officials with Government-wide responsibilities for information resources management (IRM) and information technology (IT) governance.

In accordance with the Clinger-Cohen Act (originally the Information Technology Management Reform Act), CIOs of 24 major departments and agencies have IRM as their primary duty. They are responsible for advising and assisting the agency's executive with IT acquisition and management; developing and maintaining the agency's IT architecture; promoting the efficient design and operation of the agency's major information resources management processes; monitoring the performance of IT programs of the agency; and developing the knowledge and skill of IT staff. CIOs may also lead, coordinate, or participate in programs to support the mandates of the Paperwork Reduction Act, Government Paperwork Elimination Act, Federal Records Act, E-Government Act of 2002, Privacy Act, Government Performance and Results Act, and other Federal laws and regulations relating to IRM.

This schedule does not cover all records relating to the work of CIOs. CIOs are often responsible for programs and activities whose records are already covered by an approved GRS. Records not described in this or any other GRS must be scheduled by submission to NARA of an SF 115, Request for Records Disposition Authority. If records are part of a larger case file or recordkeeping system that contains records not covered in this schedule, agencies must separately schedule those records or systems by submitting an SF 115 to NARA. If records covered by more than one item in this schedule are maintained together in one file or recordkeeping system, agencies must retain the records for the longest retention period authorized for those items.

The disposition instructions apply to records regardless of physical form or characteristics. Records may be maintained in any format on any medium.

Note that GRS 20, Electronic Records, remains in effect. GRS 20 covers certain temporary files associated with database management. This schedule supplements GRS 20 by providing disposal authority for records relating to the administration of a CIO's office, as opposed to the operation and use of specific systems. This schedule does not apply to the data or information content of IT systems. Records relating to specific systems that support or document the agency's mission must be scheduled individually by submission of an SF 115 to NARA.

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Item	Record Series Description	Disposition Authority
1	<p>Information Technology (IT) Program Planning Records. Records relating to the development of agency IT programs. Included are records that document agency-wide IT goals; specify milestones to be achieved; identify performance measures for the agency's IT portfolio; or summarize the underlying principles and approach by which the agency will plan for and manage its IT resources. Records may include strategic and tactical plans documenting the implementation and maintenance of IT systems in support of the agency mission and also may include records supporting formally issued plans, such as records of concurrence, comments, clearances, justifications, and other issuance records.</p> <p>[Note: This item does not apply to the data content or design of individual IT systems. Records relating to specific mission-related systems must be scheduled individually by submission of an SF 115 to NARA.]</p>	<p>Cut off annually. Destroy/delete when 7 years old or when no longer needed, whichever is later. GRS 27/1.</p>
2	<p>Enterprise Architecture Records. Records identifying the IT systems and networks required to perform the agency's mission and the transitional processes required to implement comprehensive programs to support that mission. Records may include technical reference models, diagrams, graphics, models, and narratives that describe the agency's baseline architecture, target architecture, and related sequencing plans.</p>	<p>Cut off when superseded by a new iteration of the enterprise architecture. Destroy/delete when 7 years old or when no longer needed, whichever is later. GRS 27/2.</p>
3	<p>IT Capitol Investment Records. Records identifying the IT systems and networks required to perform the agency's mission and the transitional processes required to implement comprehensive programs to support that mission. Records may include technical reference models, diagrams, graphics, models, and narratives that describe the agency's baseline architecture, target architecture, and related sequencing plans.</p> <p>Note: Records needed to support contracts are scheduled under GRS 3.</p>	<p>Cut off when superseded by a new iteration of the enterprise architecture. Destroy/delete when 7 years old or when no longer needed, whichever is later. GRS 27/3.</p>
4	<p>Legal Regulatory Compliance Records. Records documenting agency compliance with Federal IRM laws and regulations, including systems and reports created to support compliance with the mandates of OMB, GAO, and other Federal IRM and IT oversight agencies.</p>	<p>Cut off annually. Destroy/delete when 5 years old. GRS 27/4.</p>

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Item	Record Series Description	Disposition Authority
5	<p>CIO Committee Records. Records maintained by committees, boards, task forces, conferences, or other IT advisory, governing, or policy bodies for which the CIO has designated sponsorship, leadership, or recordkeeping responsibilities. Records include meeting minutes, summaries, agendas, and transcripts; reports, studies, and publications; membership records; correspondence, mailing, and distribution records; and other administrative committee records.</p> <p>Note: Records of Government-wide committees sponsored by CIOs, such as the Federal Chief Information Officers Council, are not covered by this item.</p>	<p>Cut off annually. Destroy/delete when 5 years old. GRS 27/5.</p>
6	<p>CIO Subject and Office Records. Records not otherwise identified in this GRS that include briefings, reports, presentations, studies, correspondence, and other documents created to support IT program objectives; responses to and decisions on matters affecting the IT program; or operational and managerial guidance to all organizational segments of the agency.</p> <p>Note: Official agency policy records generated by the CIO are not covered by this item. They are considered agency policy and issuance records and are scheduled elsewhere.</p>	<p>Cut off annually. Destroy/delete when 5 years old. GRD 27/6.</p>
7	<p>Schedule of Daily Activities. Calendars, appointment books, schedules, logs, diaries, and other records documenting meetings, appointments, telephone calls, trips, visits, and other activities by the CIO while serving in an official capacity, EXCLUDING materials determined to be personal and those that have been incorporated into other recordkeeping systems.</p> <p>Note: This item applies only to records of the CIO, not of the office's subordinate staff. See GRS 23/5 for coverage of the latter.</p>	<p>Cut off annually. Destroy/delete when not less than 2 years but not more than 5 years old. GRS 27/7.</p>
8	<p>Electronic Mail and Word Processing. Electronic copies of records that are created on electronic and word processing systems and used solely to generate a recordkeeping copy of the records covered by the other items in this schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.</p>	

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Item	Record Series Description	Disposition Authority
a.	Copies that have No Further Administrative Value. After the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recordkeeping copy.	TEMPORARY. Destroy/Delete within 180 days after the recordkeeping copy has been produced. GRS 27/8a.
b.	Copies Used for Dissemination, Revision, or Updating. That are maintained in addition to the recordkeeping copy.	TEMPORARY. Destroy/Delete when dissemination, revision, or updating is completed. GRS 27/8b.

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