

## **ED Records Schedule**

**SCHEDULE LOCATOR NO.:** 065

**APPROVED DATE:** 1/21/2009

**TITLE:** Reports to Congress and/or the President

**PRINCIPAL OFFICE:** Department-wide

**NARA DISPOSITION AUTHORITY:** N1-441-08-3

### **DESCRIPTION:**

Consists of reports made to Congress and/or the President by ED in accordance with the mandates of all education legislation. Records include reports prepared for transmittal by the Department. Reports present the objectives, accomplishments, evaluation or study results of the programs; a summary of outstanding education problems in order of priority; recommendations for proposed legislation necessary in solving the problems; and plans for program activities during the next fiscal year.

As these records may be maintained in different media formats, this schedule is written to authorize the disposition of the records in any media (media neutral). Records that are designated for permanent retention and are created and maintained electronically will be transferred to NARA in an approved electronic format.

### **DISPOSITION INSTRUCTIONS:**

a. Final report

**PERMANENT**

Cut off annually. Transfer to the National Archives 5 years after cutoff.

b. Work files

**TEMPORARY**

Cut off file annually upon transmittal to Congress or the President. Delete/destroy 5 years after cutoff.

### **IMPLEMENTATION GUIDANCE:**

The office responsible for submitting the report is responsible for maintaining the record copy of the report and for ensuring that a permanent record is maintained.

Work files pertaining to the organization, design, construction, evaluation, and revision of the report generated by participating principal offices are to be maintained by the principal offices involved. These work files will vary according to the participation of the principal office and may include requests to form work groups, minutes of work group meetings, initial and

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corrected drafts of reports or parts of reports, distribution lists, and comments on drafts. All other office and information copies of final reports and drafts are to be destroyed when no longer needed.

The annual report to the Congressional Joint Committee on Printing is covered by GRS 13, Item 5.

### **ARRANGEMENT/ANNUAL ACCUMULATION:**

### **PREVIOUS DISPOSITION AUTHORITY/CONTACT:**

N1-441-97-1/15 (ED/RDS Part 9, Item 15)

N1-441-93-5, Item 2b (ED/RDS Part 7, Item 3c)

N1-441-93-5, Item 2a (ED/RDS Part 7, Item 3b)

### **SPECIFIC LEGAL REQUIREMENTS:**

### **SPECIFIC RESTRICTIONS:**

**BUSINESS LINE:** Information Dissemination