

REQUEST FOR RECORDS DISPOSITION AUTHORITY (See Instructions on reverse)		LEAVE BLANK (NARA use only)	
TO NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NIR) WASHINGTON, DC 20408		JOB NUMBER 71-056-04-2	DATE RECEIVED 2/2/04
1. FROM (Agency or establishment) Department of the Treasury		NOTIFICATION TO AGENCY	
2. MAJOR SUBDIVISION Deputy Assistant Secretary Management and Budget		In accordance with the provisions of 44 U S C 3303a the disposition request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10	
3. MINOR SUBDIVISION Strategic Planning and Evaluation		DATE	ARCHIVIST OF THE UNITED STATES
4. NAME OF PERSON WITH WHOM TO CONFER Veronica Marco	5. TELEPHONE 622-2477		WITHDRAWN 6/23/04

6. AGENCY CERTIFICATION
I hereby certify that I am authorized to act for this agency in matters pertaining to the disposition of its records and that the records proposed for disposal on the attached ____ page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified; and that written concurrence from the General Accounting Office, under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies,

is not required; is attached; or has been requested.

DATE 01/22/2004	SIGNATURE OF AGENCY REPRESENTATIVE <i>Veronica Marco</i> Veronica T. Marco	TITLE Chief, Records Management Branch
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7. ITEM NO.	8. DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9. GRS OR SUPERSEDED JOB CITATION	10. ACTION TAKEN (NARA USE ONLY)
	<p>This SF-115 represents a one time offer to National Archives. The attached listing of records were created and maintained by the Department of the Treasury, Deputy Assistant Secretary for Management and Budget, Strategic Planning and Evaluation, IRS Management Board (1995-1997) and IRS Oversight Board (1998-2001). The boards served from 1995-2001 as oversight committees for IRS' modernization effort.</p> <p>In 1998 the IRS Restructuring and Reform Act of 1998 (RRA 98) was enacted to improve the IRS so that it may better serve the public and meet the needs of taxpayers. In addition to many major changes in the IRS, the Act called for the creation of the IRS Oversight Board, an independent body charged to provide the IRS with long-term guidance and direction.</p> <p>The records include copies of documents provided by IRS, minutes of meetings, briefing books, reports to Congress, etc. IRS transferred their set of records to the federal records center in Suitland, Maryland under the authorization for the Records Control Schedule for Strategic Planning 1.15.21, Item 4 (A)(2)(Organizational History Files). Records Group 58</p>		<p>Job Withdrawn 6/23/04</p>

**Modernization Management Board
IRS Management Board**

- Box 1 Minutes and Agendas (April 21, 1995-December 19, 1996)
- Box 2 Minutes and Agendas (December 19, 1996-February 5, 1997)
- Box 3 Minutes and Agendas (February 5, 1998-January 19, 1998)
- Box 4 Minutes and Agendas (January 19, 1999-January 12, 2001)
IRSMB IT Sub-Group (November 13-December 8, 1998)
- Box 5 IRS Business Case Handbook – 1995
TSM Briefing Books – 1996
TSM-Materials 1996
TSM-Audit Reports 1996
IRS Rescoping Study-1996
LORAL DPS Briefing-1996
Briefing Book-Testimony before the National Committee on Restructuring the IRS-1977
- Box 6 Report to Congress-Timetable for Implementing Recommendations from GAO-
July 1995-January 1997
Study of the feasibility of Outsourcing Submission Processing-January 1997
IRS-Data Center Consolidation Business case-July 21, 1997
Integrated Transition Schedule-January 1997
Tax Systems Modernization - 1997
Study of Tax System Modernization – 1997
- Box 7 Briefing Books & info furnished to the Modernization Management Board by
IRS-1997 (1 of 2 boxes)
- Box 8 Briefing Books & info furnished to the Modernization Management Board by
IRS-1997 (2 of 2 boxes)
- Box 9 Briefing Books & info furnished by IRS to MSSB for reference – 1995-1997
- Box 10 Reimbursable Agreements
IRS Management Board – FY-2000
1999 Budget
FY-2000 OMB Budget Submission
- Box 11 Taxpayer Treatment and Service Improvement Programs
Executive Steering Committee March 1998-December 1998

- Box 12 Memorandum to James Angel, Treasury Dept Ass't Director for Internal Control, in response to a Sept 21, 1999 request for follow up on Treasury OIG Audit Report No OIG-99-012 "Final Report on the Follow-up Audit on the Treasury Department's Oversight of IRS's Tax Systems Modernization Program", signed by Lisa Ross, DAS for Strategy and Finance dated November 5, 1999
Also included are the report itself and related working papers
Drafts and notes used in preparation of minutes, agendas, and presentation materials
IRS Modernization Management Board, 1995-1997
IRS Management Board, 1/1999 to 1/2001
Questions submitted by Commission on Modernization Board
IRSMB Advisory Council-6/97, 9/97, 10/97 and 11/97
Modernization Management Board Strategic Plan, Modernization Management Board Informal Workgroup
Modernization Management Board Rules & Responses
- Box 13 Drafts and notes used in preparation of minutes, agendas, and presentation materials
IRS Modernization Management Board, 1995-1997
- Box 14 Drafts and notes used in preparation of minutes, agendas, and presentation materials
IRS Modernization Management Board, 1996-1997
Modernization Management Board Partnership Summary Documents-Minutes, Briefing book
Interagency Agreement -2000

DISPOSITION: PERMANENT TRANSFER TO
NARA IMMEDIATELY AFTER
APPROVAL.

See 2/6/04 see attached email