Request for Records Disposition Authority

(See Instructions on reverse)

To: **National Archives and Records Administration (NARA)**
Washington, DC 20408

1. From: (Agency or establishment)
Office of the Director of National Intelligence

2. Major Subdivision
Office of the President's Daily Briefing

3. Minor Subdivision

4. Name of Person with whom to confer
John F. Hackett

5. Telephone (Include area code)
703-874-8085

Leave Blank (NARA Use Only)

Job Number
N1-576-11-12

Date Received
8/2/11

Notification to Agency

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request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10.

Date
27 May 2015

Archivist of the United States

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 6 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:

[X] is not required [ ] is attached [ ] has been requested

Signature of Agency Representative	Title	Date (mm/dd/yyyy)
John F. Hackett	Director of Information Management	08/02/2011

7. Item Number	8. Description of Item and Proposed Disposition	9. GRS or Superseded Job Citation	10. Action taken (NARA Use Only)
1.	Records of the Office of the President's Daily Briefing. See attached 6 pages.		

Office of the Director of National Intelligence
OFFICE OF THE DEPUTY DIRECTOR OF NATIONAL INTELLIGENCE FOR INTELLIGENCE INTEGRATION

RECORDS OF THE PRESIDENT'S DAILY BRIEF

Records Control Schedule

Mission Description
The President's Daily Brief (PDB) is a Top Secret document produced each morning, Monday through Saturday, for the President of the United States and other senior policy makers whom he may designate. Responsibility for producing the PDB — which was previously held by the Director of Central Intelligence — was transferred to the Director of National Intelligence at the time of the establishment of the Office of the Director of National Intelligence (ODNI) and the confirmation of its first Director.

The PDB is intended to provide the President and senior officials with analysis concerning sensitive situations worldwide that warrant attention by the highest level of government.

Application of Records Control Schedule Disposition Instructions
The disposition instructions in the records control schedule are mandatory. Any Federal records received or created by PDB personnel or contractors not specifically covered by this schedule or the General Records Schedules (GRS) are to be retained until such time as an applicable disposition authority approved by the National Archives and Records Administration (NARA) is obtained. To take into account the fluid nature of electronic filing, those responsible for implementing this schedule should be aware that record copies of record types described in this schedule are to receive the prescribed disposition wherever they are filed.

The records subject to this schedule date principally from 22 April 2005, the date of commencement of operations by the ODNI, and forward. However, ODNI records may include legacy records that were incorporated into or brought forward to the ODNI files for the purpose of continuity of operations. In general, segregable records created and received by the Director of Central Intelligence and his Community Management Staff, the ODNI's predecessor, are managed under the CIA Records Control Schedule; incorporated legacy records are managed under the ODNI schedule. In addition, the ODNI has used the CIA schedule retirement authority on an interim basis until the approval of the ODNI Records Control Schedule.

The Information Management Technical Officer with responsibility for PDB records will support effective implementation of the disposition requirements of this schedule through the development and issuance of appropriate operational guidance and supplementary instructions necessary to assure adequate and proper documentation of the official mission, responsibilities, and actions of the President's Daily Brief staff.

Note on Sensitivity of PDB Records
The majority of the records addressed in this schedule are classified as national security information in accordance with statutory and national policy directives. Most of the records series described in this schedule contain information classified to the highest levels, requiring planning for their continued security until they are declassified or destroyed. The user of this schedule should assume that the subject records are highly classified unless noted otherwise. In addition, certain series may contain material covered by the Privacy Act or potentially exempt from disclosure under the Freedom of Information Act for reasons other than National Security.

Note on Vital Records
Records management personnel should be alert to the need to identify vital records so that they can be accessed quickly when needed. Vital records are (1) those that specify how the ODNI will operate in case of an emergency or disaster, (2) those necessary to the ODNI's continued mission critical operations during and after an emergency, and (3) those that must be preserved to protect the legal and financial rights and interests of the ODNI and of persons affected by the ODNI. Item 1 in this schedule is identified as a vital record.

Note on PDB Record Keeping
The PDB is the culmination of a cooperative effort of the Intelligence Community to present the President and other senior policy makers with the most current important information affecting the security of the country. As a cooperative product, the PDB is the result of a complicated but structured interagency process that generates important records at each stage in its development. This schedule applies only to those records that are made or received in support of the PDB. Many background and source records which provide the bases for the analyses advanced in the PDB will reside among the records of associated agencies of the Intelligence Community or other components of the ODNI.

The PDB is published in paper, but effective 2013 it will be published and saved in electronic form for ease of distribution and reference. PDB staff maintains record copies of official files in electronic form on both shared and individual network drives. Records kept on both the network and local individual drives that are not disposable under the GRS are to be moved or copied to the network shared drives or kept in paper files, as appropriate, to be retained or destroyed in accordance with an approved ODNI disposition authority.

Many of the permanent paper records are duplicated by electronic versions also proposed for permanent retention for ease of retrieval and reference in the future.

Records Descriptions and Disposition Instructions

Item	Title & Description	Disposition
1.	**The President's Daily Brief.**	
1a.	**The President's Daily Brief Production Case Files.** These are the most complete record of the PDB as it is sent to the President. In addition to the final briefing package, the case files may include background notes, drafts, finished intelligence, source reporting, "briefer reports" (which are after action reports on the briefing), threat matrices, finished PDB articles, emails, final proofs, follow-up reports, raw source data, "walk-ons" (late additions) and other documentation that contributed to the final briefing package. The file will also contain information on who conducted the briefing, who was present, and briefers' reports and notes on what transpired at the briefing. The character and content of these files may change with changes in Presidential preferences. Records kept in paper form,	**Permanent.** Paper Records: Retain paper records in current files until no longer needed, and then transfer to ODNI storage area. Transfer to NARA in five-year blocks when most recent file is 50 years old. Electronic Records: Maintain electronic files in active system until no longer needed, copy to verified accessible format and medium as required for preservation and continued reference. Transfer to NARA when 50 years old in a medium and format acceptable to NARA in accordance with standards set forth in Federal regulations.

	2005-2012.	
PDB 1b.	**PDB POTUS Package.** This is the actual briefing package presented to the President. Normally the package contains just the finished articles and other inclusions, which may be graphic, photographic, or interactive media as the briefing package transition to electronic form in 2013. Some of the package may be kept by the White House, either to be returned at a later time or perhaps to be incorporated into Presidential records. Whether or not material is left with the White House, the POTUS package included here is a complete copy.	**Permanent.** Paper Records: Retain paper records in current files until no longer needed, and then transfer to ODNI storage area. Transfer to NARA in five-year blocks when most recent file is 50 years old. Electronic Records: Maintain electronic files in active system until no longer needed, copy to verified accessible format and medium as required for preservation and continued reference. Transfer to NARA when 50 years old in a medium and format acceptable to NARA in accordance with standards set forth in Federal regulations.
PDB 2.	**PDB Electronic Repositories.** PDB Case Files in an electronic file containing PDF documents scanned from hard copy or documentation born, retained, and stored in electronic form.	
PDB 2a	**PDB Electronic Archives** The Official Record of the PDB Case File as described in PDB 1 as it is born, retained, stored, and intended for permanent preservation in electronic form. In development.	**Disposition not Authorization.** Request for disposition authority to be submitted when system is operational.
PDB 2b	**PDB LAN – 1994-2010 [CLOSED SERIES]** The Brief stored on a Local Area Network intended as a convenient electronic reference copy, stored both on CDs and on data tape to be kept long term for ease of future access. System operative 1994-2010	**Temporary.** Maintain electronic files in active system until no longer needed, copy to accessible format and medium as required for preservation and continued reference. Delete or destroy when no longer needed.
PDB 3	**Briefer Database.** A database record of assignments resulting from or relating to the briefing of the President or other PDB customers, including notes on follow-up to taskings, and a list of items shown to the briefing recipient.	**Permanent.** Maintain electronic files in active system until no longer needed, copy to verified accessible format and medium as required for preservation and continued reference. Transfer to NARA when 50 years old in a medium and format acceptable to NARA in accordance with standards set forth in Federal regulations.
PDB 4.	**PDB Policy Files.**	
PDB 4a	**Final PDB production policies and guidance** governing all steps in the process as circulated to those involved in PDB production. This is cumulative set of records, each new version to be preserved	**Permanent.** Capture new policy and guidance as promulgated. Maintain electronic files in active system until no longer needed, copy to verified accessible format and medium as required for preservation and continued reference. Transfer to

		NARA when 30 years old in a medium and format acceptable to NARA in accordance with standards set forth in Federal regulations.
PDB 4b	**PDB Policy Advisory Meeting Files.** Agendas, handouts, and other incidental materials used and circulated at Advisory Meetings, which are quarterly gatherings of principals involved in producing the PDB, briefers, and involved IC analysts.	**Permanent.** Electronic Records: Maintain electronic files in active system until no longer needed, copy to verified accessible format and medium as required for preservation and continued reference. Transfer to NARA when 30 years old in a medium and format acceptable to NARA in accordance with standards set forth in Federal regulations.
PDB 5.	**Working Papers.**	
PDB 5a.	**Substantive Working Papers.**	
PDB 5a1	Drafts and other work papers that were coordinated outside the unit of origin and contain information that adds to a proper understanding of the formation and development of final products that embody significant policies, decisions, or actions. Such products have Community-wide reach, public visibility, initiate change, or set precedent.	**Permanent.** Paper Records: If possible, file working papers with the final version of the document to which they relate. Or, retain in current files until no longer needed, then transfer to ODNI storage area. Transfer to NARA in five-year blocks when most recent file in block is 50 years old. Electronic records: If possible, file working papers in appropriate recordkeeping systems with the final version of the document to which they relate. Or, maintain in active system until no longer needed, copy to verified accessible format and medium as required for preservation and continued reference. Transfer to NARA when 50 years old in a medium and format acceptable to NARA in accordance with standards set forth in Federal regulations.
PDB 5a2	Drafts and associated materials related to final decisions, actions, products, or policies of transitory or routine significance.	**Temporary.** Delete or destroy when 3 years old or when no longer needed, whichever is later.
PDB 5b	**Non-Substantive Working Papers.** Collected and created materials not coordinated and/or disseminated outside the unit of origin that do not contain information documenting significant policy development, action, or decision making. These drafts and working papers do not result directly in a final product or an approved finished report. Included are such materials as rough notes and calculations and preliminary drafts produced solely for proof reading or internal discussion, reference or consultation, and associated transmittals, notes, reference and background materials.	**Temporary.** Screen annually and maintain in current files until no longer needed for business purposes, then delete or destroy.

PDB 6	**Individual Staff Files** These *ad hoc* subject files are created as individual staff members receive reference copies; create drafts of reports, correspondence, and spreadsheets; and save emails for convenient access. Although these files relate to the full range of subjects and administrative and policy activities dealt with by the PDB, they are preliminary and facilitative support and background material.	**Temporary.** Delete or destroy when 2 years old or when no longer needed.
PDB 7	**Common Administrative Records.** Office Operating Files and Facilitative Records. Includes administrative subject files, suspense files, tracking and control records, travel records, and other transitory documents kept for convenience of reference and which relate to routine internal administration or housekeeping activities of the office rather than the mission functions for which the office exists. Includes routine office administrative files containing standard operating procedures and resulting products relating to orientation, paperwork, and system privileges for arriving and departing employees.	**Temporary.** Delete or destroy when 2 years old or when no longer needed per GRS 23, Item 1.
PDB 8	**Calendars.** Databases or hard copy appointment books containing the schedule and activities of the PDB leadership and staff. 2005 to Present.	
PDB 8a	**Staff-level individual and group calendars** documenting support activities.	**Temporary.** Delete or destroy when 2 years old in accordance with GRS 23, Item 5a.
PDB 8b	**Production Planning Calendar.** A facilitative tool of transitory importance. Used primarily by IC agencies to note possible future products that may or may not develop.	**Temporary.** Delete or destroy when no longer needed or when superseded
PDB 9	**Reference Files.** Copies of intelligence products, memoranda, reports, budgets, publications, and other materials maintained for convenience of reference.	**Temporary.** Delete or destroy when no longer needed or when superseded.

PDB 10	**Human Resources Records.**	
PDB 10a	**Supervisors' copies** of Official Personnel Files documentation.	**Temporary.** Review annually and destroy superseded or obsolete documents, or destroy file relating to an employee within 1 year after separation or transfer per GRS 1, item 18.
PDB 10b	**Applications** for employment, interview files, position descriptions, vacancy notices, supervisor's informal personnel records, including performance appraisals. Identified by applicant name, position title, as applicable.	**Temporary.** Employee interview records: Destroy 6 months after transfer or separation of employee per GRS 1, item 8.
PDB 10C	**Applications-unsuccessful applicants and vacancy postings.** Interview records and applications of unsuccessful applicants, vacancy postings.	**Temporary.** Cut off when the position has been filled or cancelled. Destroy 2 years after cutoff.
PDB 11	**Contract Records.** Local convenience copies of documentation for specialized contracts that were used for day-to-day technical direction of the task order or work assignment. May also include copies of contract development, competition and award documentation	**Temporary.** Destroy 2 years after completion of contract and any post-contract audits, challenges, or investigations. Note: Records containing the substantive results of contracts for analytical and other information products will be filed with and share the disposition of the projects and case files with which they are associated.