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Scheduling Public Affairs Records

Records Scheduling Guide 2

National Archives and Records Administration
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About this Guide

This leaflet is intended to assist agency records managers, agency records schedulers, and NARA appraisal archivists to schedule records created and held in the process of an agency's crafting and disseminating information to the public. It is not mandatory that agencies or appraisal archivists use this guide when scheduling or appraising records, but it should help bring more consistency to these processes. [NARA's appraisal criteria](#) should always be considered when proposing the disposition of records.

What are public affairs records?

The public affairs function involves the exchange of information and communications between the Federal government and the public. This function consists of two main activities:

- Creation or distribution of official government information such as publications, speeches, agency histories, and educational materials.
- Management of relationships between the agency and stakeholders. Activities involve information dissemination, responding to information requests from the public, and managing relationships with stakeholders such as the press, resulting in records such as communications, web postings, blogs, media advisories, and press releases.

This function does not include interaction between agencies and Congress, which is covered under the Congressional and legislative affairs function and GRS 6.6.

Considerations when scheduling Public Affairs records

Some public affairs records are often permanent because they document important interactions between the Federal government and the public and the information that the Government presents to the public about Government activities.

Public affairs related records may be found in agency public affairs offices, communications offices, or with the agency historian. Some records that are created for high-level officials, such as speeches and briefing books, may also appear in the records of those officials. As many of these records are of permanent value, the agency needs to determine where in the agency the recordkeeping copy of the record is maintained and schedule that copy as the permanent record.

Public affairs records covered by the GRS

The General Records Schedules (GRS) provide uniform disposition instructions for records commonly created by many or most Federal government agencies.

[GRS 4.2](#), item 010, covers general information requests and responses.

[GRS 6.4](#) covers routine public affairs records that are considered to be of temporary value.

These records include:

- routine, day-to-day operational records;
- correspondence and communications from the public that do not require formal action;
- certain records related to the development of public affairs related projects
- routine media relations records
- non-mission related photographs and other audiovisual records

Public affairs-related records that are not covered by the GRS must be scheduled by individual agencies.

Scheduling common public affairs records

The following types of public affairs records, while common across all agencies, are not included in GRS 6.4 because they are either clearly permanent in all agencies or the value may vary depending on the agency or where in the agency the record is found.

Agency histories and oral histories should always be scheduled as permanent. See below for agency history background materials.

Agency history background materials may or may not be permanent. Unique collections are more likely to be permanent. Other collections are likely temporary, especially if they consist of copies and reference materials.

Retention suggestion: These records should be kept based on the business needs of the agency. Examples of agency schedules for these records show a wide variation in retention periods, ranging from destroy when no longer needed to destroy upon discontinuance of the agency.

Audiovisual records, mission-related are usually permanent, regardless of format. Exceptions:

- Videos or audio recordings of mission-related meetings or conference proceedings that are transcribed. NARA prefers that the transcription be permanent and the recording be temporary.
- Materials acquired from outside the agency that are not produced specifically for that agency.
- Extra copies.

Note: Non-mission related audiovisual records are scheduled as temporary under GRS 6.4, item 060. Audiovisual records related to non-mission related employee training are scheduled as temporary under GRS 2.6, item 020.

Biographies or biographical sketches including photographs, of high-level agency officials tend to be permanent because of their historical value in documenting the individuals that ran the agencies. Duplicates, however, should be scheduled as temporary with a short term retention. *See also Speaker files.*

Briefing books are sometimes created by public affairs or communication offices for high-level officials in the agency. Agencies should determine which copy will be the recordkeeping copy (usually the one in the office of the high-level officials). All other copies should be scheduled as temporary with a short-term retention.

Educational campaign materials such as publications, posters, and press releases, are scheduled as permanent. They are temporary if a recordkeeping copy is scheduled as permanent in a different series.

Employee newsletters' value is dependent on content. Employee newsletters should only be scheduled as permanent if they include articles that substantially document programs and activities of agencies or their employees that would not appear or be as easily accessed in other sources. If the newsletters only include content such as staff awards, retirements, activities at institutions, community service, appointments to posts, employee and union events, and regional or local news, they are more likely of temporary value.

Fact sheets may be different types of records in different agencies. In some cases, they are similar to press releases. In others, they simply provide highlights about agency programs or policies. Fact sheets containing substantive information about Federal programs or initiatives are more likely to be of permanent value. Fact sheets highlighting or providing a brief overview of an agency program for which similar information may be found in other permanent records are likely to be temporary. When assessing the value of these records, ask: is this record the best source of this information?

Photographs, mission-related (including official portraits) should be scheduled as permanent, regardless of format. See [36 CFR Chapter XII, Part 1237](#) for additional information related to transfer of permanent photographs. Non-mission related photographs are scheduled under GRS 6.4, item 060.

Posters, if mission-related (bearing on the unique purposes, programs, objectives, and history of the sponsoring agency), should be scheduled for transfer to NARA in the following form: for posters produced as hard-copy products, two copies of each finished poster to NARA; and for posters generated only as digital products, a digital image file for each finished poster. Most posters are mission-related, but if non-mission-related posters are produced (those that address events and activities common to all government agencies such as Combined Federal Campaign functions, health fairs, routine workshops) they should be scheduled as temporary.

For all posters, preparatory artwork or graphics generated in the course of production are temporary under GRS 6.4, item 030.

Retention suggestion: Since posters are often scattered and not compiled centrally, we recommend immediate transfer to NARA upon publication, or adding the NARA Still Picture Branch to the agency's standard external distribution lists.

Press or news releases (recordkeeping copy only) are permanent. Copies should be temporary.

Exception: Media advisories (notices to the media about events) are covered by GRS 6.4, item 040.

Publications—a single copy of each—should be scheduled as permanent. All other copies are considered non-record.

Exception: Publications that are only promotional or publicity materials. These records are more likely temporary.

Speaker files are biographical information about agency employees available for speaking engagements, kept on file to respond to requests for such information. They are generally of temporary value.

Retention suggestion: Some agencies have scheduled these records with instructions such as destroy when superseded or obsolete, upon end of tenure, or up to 2 years after subject leaves the agency.

Speeches, interviews, statements to the press may exist in the offices of officials responsible for them, as well as public affairs or communication offices that often prepare such documents. Agencies should determine which copy will be the recordkeeping copy. The recordkeeping copy should be scheduled as permanent in most cases. Related records that are generally of temporary value:

- reference copies of speeches given by people outside the agency
- speeches of staff at a lower level that do not include unique or substantive information

Transcripts of press conferences and interviews are usually permanent. Exceptions may be for lower level staff where the content of the event is neither unique nor substantive.

Websites and social media records including blogs. See *Scheduling Web Records* (Records Scheduling Guide 1). See also [NARA Guidance on Scheduling Web Records](#).

Retention Guidelines

Transfer of permanent records: Records of permanent value should be scheduled for transfer when 15 years old per Scheduling Guidance on the Appropriate Age for Legal Transfer of

Permanent Records to the National Archives of the United States. This bulletin also provides instructions for what to do if your agency wishes to request a shorter retention.

By request of NARA's Special Media custodial units, and in the interest of preservation objectives found in 36 CFR 1237, still pictures and motion/sound materials should be transferred to NARA sooner: within 3-5 years after creation, in the case of special media digital records; and within 5-10 years after creation, in the case of special media analog records. (See also Note on special considerations for transfer of posters).

Retention of temporary records: Unless otherwise noted, temporary records should be retained based on agency business needs.

Related NARA Resources

Code of Federal Regulations: [36 CFR Chapter XII, Part 1235](#) (Transfer of Records to the National Archives of the United States) and [36 CFR Chapter XII, Part 1237](#) (Audiovisual, Cartographic, and Related Records Management)

[Strategic Directions: Appraisal Policy](#) (excerpted from NARA Directive 1441)

[NARA Bulletin 2015-04: Metadata Guidance for the Transfer of Permanent Electronic Records](#)

[NARA Bulletin 2015-01: Scheduling Guidance on the Appropriate Age for Legal Transfer of Permanent Records to the National Archives of the United States](#)

[NARA Bulletin 2014-04: Revised Format Guidance for the Transfer of Permanent Electronic Records](#)

[NARA Bulletin 2014-02: Guidance on managing social media records](#)