

National Archives and Records Administration  
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-0059-2020-0025

Status: APPROVED  
Date Approved: 12/19/2024

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## General Information

Agency or Establishment	Department of State
Record/Scheduling Group	0059 - General Records of the Department of State
Records Schedule Applies To	Agency Subdivision
Major Subdivision	Office of Management
Minor Subdivision	Strategy and Solutions (M/SS)
Schedule Subject	Consolidated Schedule: Records of Strategy and Solutions
Additional Schedule Information	<p>Flexible schedule that consolidates the records of the State Department Office of Management Strategy and Solutions' (M/SS) and applies to records January 2016 and forward. This schedule does not supersede existing records schedules for the Office. Crosswalk with additional detail is attached to the schedule.</p> <p>The mission of M/SS is to catalyze strategic insights and solutions to help improve the management platform and advance foreign policy goals. M/SS formulate policy recommendations for leadership; provide consultative services to Department clients to engender best practices in areas such as change management, project management, process improvement, strategic action planning, sustainability, and overseas management optimization; and provide data management and analytics expertise and the latest tools, training, and technology.</p>
Is There a Classified Version of This Schedule?	No
Is consultation and coordination with Tribal Governments required?	Predate requirement

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## Item Count

Total number of disposition items: 8

Number of Temporary disposition items: 5

Number of Permanent disposition items: 3

Number of Items with Disposition Not Approved: 0

Number of Inactive disposition items: 0

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Outline of Records Schedule Items for DAA-0059-2020-0025

<b>Item #</b>	<b>Title</b>	<b>Disposition</b>
0001	Program Records	Permanent
0002	Program Support and Coordination Records	Temporary
0003	Committee (Non-FACA) Records	Permanent
0004	National Security Decision Directive (NSDD) 38 Case Files	Permanent
0005	Overseas Presence Review Records	Temporary
0006	Special Projects and Initiatives Records	Temporary
0007	Data Management and Analytics Records	Temporary
0008	Working Files	Temporary

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Records Schedule Items

<b>DAA-0059-2020-0025-0001</b>		<b>STATUS: Active</b>
<b>ITEM GENERAL INFORMATION</b>		
Item Title	Program Records	
Item Description	Records documenting the development, formulation, and coordination of the Office of Management Strategy and Solutions' (M/SS) policies relating to Chief of Mission (COM) authority, overseas presence, resource utilization, country clearance, data management analytics, and all related subjects. The records include, but are not limited to, policies, strategic plans, management studies, interagency agreements, overseas staffing reviews and reports, white papers, briefings, memoranda, proposals for position ceiling and staffing levels, and all related records.	
Is this item media neutral?	Yes	
Is this item a Big Bucket?	No	
<b>SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS</b>		
Does this item supersede existing disposition authorities?	No	
Is this item a deviation from the GRS?	No	
<b>DISPOSITION INSTRUCTION</b>		
Final Disposition	Permanent	
Cutoff Instructions	Other: Cutoff at the end of calendar year or final action.	
Are there multiple instructions for this item?	No	
Transfer Instruction	Transfer to the National Archives 25 year(s) after cutoff.	
<b>ADDITIONAL INFORMATION</b>		
Current Records Format	Structured data formats:Not known at this time	
Are any of the records covered by this item subject to a FOIA exemption?		

<b>DAA-0059-2020-0025-0002</b>		<b>STATUS: Active</b>
<b>ITEM GENERAL INFORMATION</b>		
Item Title	Program Support and Coordination Records	

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Item Description	Records documenting the oversight and support to Department Bureaus and Posts related to follow-up reviews of OIG inspections and GAO reporting, International Cooperative Administrative Support Services (ICASS) coordination, request for position data action files, travel requests and related data for individuals traveling to a post on official U.S. Government business, capacity building metrics, and all related records.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
<b>SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS</b>	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
<b>DISPOSITION INSTRUCTION</b>	
Final Disposition	Temporary
Retention Period	Other: Destroy when 5 years old, when obsolete, or when no longer needed, whichever is later.
<b>ADDITIONAL INFORMATION</b>	
Are any of the records covered by this item national security classified?	
GAO Approval Required	No

DAA-0059-2020-0025-0003	STATUS: Active
<b>ITEM GENERAL INFORMATION</b>	
Item Title	Committee (Non-FACA) Records

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Item Description	Records documenting the activities of the Accountability Review Board (ARB), Regional Initial Council (RIC), Application Data Coordination Working Group (ADCWG), Enterprise Data Council (EDC), Electronic Records Management Working Group (ERMWG), and all other non-FACA intra-agency and inter-agency committees, task forces, or working groups led or chaired by Office of Management Strategy and Solutions that develop, coordinate, recommend, or promote policies, procedures, standards, and plans on management improvements, accountability, and other related subjects. Records include, but are not limited to, policy files, incident files, implementation files, charter, meeting agendas, minutes, transcripts, reports, policies, correspondence, briefing materials, decisions, standards, agreements, responses, and other related documentation. Exclusion: This item does not include Federal Advisory Committee Act (FACA) Records.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
<b>SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS</b>	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
<b>DISPOSITION INSTRUCTION</b>	
Final Disposition	Permanent
Cutoff Instructions	Other: Cut off at the end of calendar year, when superseded, or after final action
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 25 year(s) after cutoff.
<b>ADDITIONAL INFORMATION</b>	
Current Records Format	Structured data formats:Not known at this time
Are any of the records covered by this item subject to a FOIA exemption?	

DAA-0059-2020-0025-0004	STATUS: Active
<b>ITEM GENERAL INFORMATION</b>	
Item Title	National Security Decision Directive (NSDD) 38 Case Files

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Item Description	Records documenting the implementation of requests by U.S. Government Agencies for additions, deletions, or other changes to staffing overseas. The Office of Management Strategy and Solutions coordinates with other Agencies, Department of Defense (DOD), and Department of State bureaus and missions to assess the resources, security, and strategic goals of placing U. S. Government personnel abroad. Records include, but are not limited to, memoranda and correspondence covering appeals and funding of positions; policies, procedures, guidelines, reports and briefings on staffing and reporting of overseas positions; and station closings, intelligence community issues, talking points, overseas staffing proposals, restructuring initiatives, annual reports, and working group documents.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
<b>SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS</b>	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
<b>DISPOSITION INSTRUCTION</b>	
Final Disposition	Permanent
Cutoff Instructions	Other: Cut off in the year approved, disapproved, or when case is closed.
Are there multiple instructions for this item?	No
Transfer Instruction	Transfer to the National Archives 25 year(s) after cutoff.
<b>ADDITIONAL INFORMATION</b>	
Are any of the records covered by this item subject to a FOIA exemption?	

<b>DAA-0059-2020-0025-0005</b>	<b>STATUS: Active</b>
<b>ITEM GENERAL INFORMATION</b>	
Item Title	Overseas Presence Review Records
Item Description	Records documenting the analysis of United States Government (USG) direct hire positions overseas on a country, regional, and worldwide basis. Records include, but are not limited to, post reviews, reports, and staffing recommendations on strategic objectives, security, and financial cost of sustaining a USG presence abroad.

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Is this item media neutral?	Yes
Is this item a Big Bucket?	No
<b>SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS</b>	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
<b>DISPOSITION INSTRUCTION</b>	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff when review is finalized.
Retention Period	Destroy 10 year(s) after cutoff.
<b>ADDITIONAL INFORMATION</b>	
Are any of the records covered by this item national security classified?	
GAO Approval Required	No

<b>DAA-0059-2020-0025-0006</b>	<b>STATUS: Active</b>
<b>ITEM GENERAL INFORMATION</b>	
Item Title	Special Projects and Initiatives Records
Item Description	Records documenting special projects and initiatives that promote continuous improvement, data driven solutions, decision-making, increase efficiencies, and an overall improvement of the Department’s environmental footprint both internally and externally.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
<b>SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS</b>	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
<b>DISPOSITION INSTRUCTION</b>	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff at the end of the calendar year or after final action.
Retention Period	Destroy 5 year(s) after cutoff.
<b>ADDITIONAL INFORMATION</b>	
Are any of the records covered by this item national security classified?	



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GAO Approval Required	No
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<b>DAA-0059-2020-0025-0007</b>	<b>STATUS: Active</b>
<b>ITEM GENERAL INFORMATION</b>	
Item Title	Data Management and Analytics Records
Item Description	Records documenting the activities related to the support of the Chief Data Officer (CDO), data management, analytics, and visualization projects, as well as, the latest tools, training, and technology to assist bureaus and posts to make better foreign policy and management decisions. Records include, but are not limited to, MOUs, MOAs, project files, master reference data tables, outreach and communication files, data policies and procedures, presentations, talking points, media files, and all related records.
Is this item media neutral?	Yes
Is this item a Big Bucket?	No
<b>SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS</b>	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
<b>DISPOSITION INSTRUCTION</b>	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff at the end of the calendar year.
Retention Period	Destroy 10 year(s) after cutoff.
<b>ADDITIONAL INFORMATION</b>	
Are any of the records covered by this item national security classified?	
GAO Approval Required	No

<b>DAA-0059-2020-0025-0008</b>	<b>STATUS: Active</b>
<b>ITEM GENERAL INFORMATION</b>	
Item Title	Working Files
Item Description	Contain drafts and copies used for reference and/or created to produce official project or program files or final products within the office. This documentation includes, but is not limited to notes, background information, and recommendations. Excluded from this item are records of final products incorporated into official files.

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Is this item a Big Bucket?	No
<b>SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS</b>	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
<b>DISPOSITION INSTRUCTION</b>	
Final Disposition	Temporary
Cutoff Instructions	Other: Cutoff when final product, program, or project file has been created, disseminated, and/or approved or when obsolete.
Retention Period	Destroy 3 year(s) after cutoff
<b>ADDITIONAL INFORMATION</b>	
Are any of the records covered by this item national security classified?	
GAO Approval Required	No

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Signatory Information

Action	User	Date
Approve	Colleen Shogan	12/19/2024