

Request for Records Disposition Authority

Records Schedule Number DAA-0269-2016-0013

Schedule Status Approved

Agency or Establishment General Services Administration

Record Group / Scheduling Group General Records of the General Services Administration

Records Schedule applies to Agency-wide

Schedule Subject 269.15 Customer Service / Business Development Records

Internal agency concurrences will be provided No

Background Information

The records in this group concern the fulfillment of GSA's mission of "delivering excellent customer service." Activities under this group include delivering services to customers, identifying customers, developing new services, sustaining and growing current customer use of GSA's services, being responsive to customer concerns, and managing customer service programs, services and projects. "Customers" include internal customers (GSA making use of its own services), external customers (client federal, state, and municipal agencies using GSA's services), and citizens making use of GSA's variety of services. "Vendors" include contractors. For business development, this schedule includes records relating to both customer and vendor development to assure compliance with the Small Business Act and other federal mandates.

Item Count

Number of Total Disposition Items	Number of Permanent Disposition Items	Number of Temporary Disposition Items	Number of Withdrawn Disposition Items
5	0	5	0

GAO Approval

Outline of Records Schedule Items for DAA-0269-2016-0013

Sequence Number	
1	269.15 Customer Service / Business Development Records
1.1	011 – Customer Program Management Records Disposition Authority Number: DAA-0269-2016-0013-0001
1.2	012 – Customer Research and Reporting Records Disposition Authority Number: DAA-0269-2016-0013-0002
1.3	021 – Customer Service Delivery Records Disposition Authority Number: DAA-0269-2016-0013-0003
1.4	022 – Customer Outreach Records Disposition Authority Number: DAA-0269-2016-0013-0004
1.5	031 – Customer Service Vendor (Contractor) Interaction Records Disposition Authority Number: DAA-0269-2016-0013-0005

Records Schedule Items

Sequence Number											
1	<p>269.15 Customer Service / Business Development Records The records in this group concern the fulfillment of GSA's mission of "delivering excellent customer service." Activities under this group include delivering services to customers, identifying customers, developing new services, sustaining and growing current customer use of GSA's services, being responsive to customer concerns, and managing customer service programs, services and projects. "Customers" include internal customers (GSA making use of its own services), external customers (client federal, state, and municipal agencies using GSA's services), and citizens making use of GSA's variety of services. "Vendors" include contractors. For business development, this schedule includes records relating to both customer and vendor development to assure compliance with the Small Business Act and other federal mandates. The records in this group supersede all previously-scheduled GSA record types and complement the General Record Schedule supported for all federal agencies.</p>										
1.1	<p>011 – Customer Program Management Records Disposition Authority Number DAA-0269-2016-0013-0001</p> <p>This series of records is concerned with creating and managing successful customer service programs. Types of programs included are those for delivering services, conducting research for customer and service needs, and reaching out to customers. Included are planning documents, management decisions and directives, management reports, organizational assignments, correspondence, agreements, and related records.</p> <table><tr><td>Final Disposition</td><td>Temporary</td></tr><tr><td>Item Status</td><td>Active</td></tr><tr><td>Is this item media neutral?</td><td>Yes</td></tr><tr><td>Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing?</td><td>No</td></tr><tr><td>GRS or Superseded Authority Citation</td><td>NC1-137-78-002 / 66E1 NC1-137-78-002 / 66A1 NC1-137-78-002 / 66A10 NC1-137-78-002 / 66A11 NC1-137-78-002 / 66A5 NC1-137-78-002 / 66B1 NC1-137-78-002 / 66B5 NC1-137-78-002 / 66D1 NC1-137-78-002 / 66D5</td></tr></table>	Final Disposition	Temporary	Item Status	Active	Is this item media neutral?	Yes	Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing?	No	GRS or Superseded Authority Citation	NC1-137-78-002 / 66E1 NC1-137-78-002 / 66A1 NC1-137-78-002 / 66A10 NC1-137-78-002 / 66A11 NC1-137-78-002 / 66A5 NC1-137-78-002 / 66B1 NC1-137-78-002 / 66B5 NC1-137-78-002 / 66D1 NC1-137-78-002 / 66D5
Final Disposition	Temporary										
Item Status	Active										
Is this item media neutral?	Yes										
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	Disposition Instruction	
	Cutoff Instruction	Cut off at the end of the fiscal year
	Retention Period	Destroy 6 years after cutoff. Longer retention is authorized if required for statutory or authoritative reasons.
	Additional Information	
	GAO Approval	Not Required
1.2	012 – Customer Research and Reporting Records	
	Disposition Authority Number	DAA-0269-2016-0013-0002
	This series is focused on the results of research conducted to improve customer services and delivery of services. This includes studies, focus groups, surveys and questionnaires involving customers, trends, satisfaction, products, and service delivery methods. Also included are resulting reports, papers, resource materials, correspondence, publications based on the research conducted and related records.	
	Final Disposition	Temporary
	Item Status	Active
	Is this item media neutral?	Yes
	Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing?	No
	Disposition Instruction	
	Cutoff Instruction	Cut off at the end of the fiscal year when collection is complete.
	Retention Period	Destroy 6 years after cutoff.
	Additional Information	
	GAO Approval	Not Required
1.3	021 – Customer Service Delivery Records	
	Disposition Authority Number	DAA-0269-2016-0013-0003
	This series concerns records created as a result of interactions with customers while providing services. Examples include call centers, internet-based services, and walk-up services. Included are records of customer transactions, issues and resolutions, customer service activity monitoring reports, correspondence, and related materials.	

Final Disposition Temporary
Item Status Active
Is this item media neutral? Yes
Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? No
GRS or Superseded Authority Citation NC1-269-80-012 / 20B40/b
NC1-269-80-012 / 20B5

Disposition Instruction

Cutoff Instruction Cut off at the end of the fiscal year.
Retention Period Destroy 3 years after cutoff.

Additional Information

GAO Approval Not Required

022 – Customer Outreach Records

Disposition Authority Number DAA-0269-2016-0013-0004

This series concerns records created as a result of reaching out to customers and prospective customers internal and external to GSA. Examples include email outreach campaigns, booths at conferences, and hosting special events to meet customers in person. When these activities are part of a formal relationship with vendors, the records are part of the Vendor (Contractor) Interaction Records. Included are records of regularly occurring outreach activities, special promotions, outreach planning, surveys, communications, agreements, correspondence, and related materials.

Final Disposition Temporary
Item Status Active
Is this item media neutral? Yes
Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? No
GRS or Superseded Authority Citation NC1-269-80-012 / 20B20
NC1-269-80-012 / 20B25

Disposition Instruction

Cutoff Instruction Cut off at the end of the fiscal year.
Retention Period Destroy 3 years after cutoff.

1.4

1.5

Additional Information

GAO Approval Not Required

031 – Customer Service Vendor (Contractor) Interaction Records

Disposition Authority Number DAA-0269-2016-0013-0005

This series concerns formal interactions with vendors/contractors in the course of providing and planning customer service. Included are records of vendor meetings, workshops, site visits, forums, conferences, recommendations and guidance provided by vendors, correspondence with vendors related to formal customer service activities and records of coordinated service and outreach activities with vendors. Also included are records created in response to policy and programs associated with qualifying vendors and contractors and marketing available opportunities and related records.

Final Disposition Temporary

Item Status Active

Is this item media neutral? Yes

Do any of the records covered by this item currently exist in electronic format(s) other than e-mail and word processing? No

GRS or Superseded Authority Citation
NC1-269-80-012 / 20B1
NC1-269-80-012 / 20B10
NC1-269-80-012 / 20B15
NC1-269-80-012 / 20B60
NC1-269-80-012 / 20B50

Disposition Instruction

Cutoff Instruction Cut off at the end of the fiscal year.

Retention Period Destroy 3 years after cutoff.

Additional Information

GAO Approval Not Required

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 in this schedule are not now needed for the business of the agency or will not be needed after the retention periods specified.

Signatory Information

Date	Action	By	Title	Organization
05/11/2016	Certify	Robert Smudde	National Records Officer	Office of the Chief Information Officer - Office of Policy and Compliance
10/28/2016	Return for Revision	Lloyd Beers	Appraisal Archivist	National Archives and Records Administration - ACNR Records Management Services
11/01/2016	Submit For Certification	David Simmons	Knowledge Management Specialist	Public Buildings Service - All os Region 5 GSA
11/02/2016	Certify	Robert Smudde	National Records Officer	Office of the Chief Information Officer - Office of Policy and Compliance
01/13/2017	Return for Revision	Lloyd Beers	Appraisal Archivist	National Archives and Records Administration - ACNR Records Management Services
01/18/2017	Submit For Certification	David Simmons	Knowledge Management Specialist	Public Buildings Service - All os Region 5 GSA
01/18/2017	Certify	Robert Smudde	National Records Officer	Office of the Chief Information Officer - Office of Policy and Compliance
03/22/2017	Submit for Concurrence	Rachel BanTonkin	Supervisor, ACNR Appraisal Team 1	National Archives and Records Administration - Records Management Services
03/23/2017	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - ACNR Records Management Services

03/23/2017	Concur	Margaret Hawkins	Director of Records Management Services	National Records Management Program - ACNR Records Management Services
03/27/2017	Approve	David Ferriero	Archivist of the United States	Office of the Archivist - Office of the Archivist