

Request for Records Disposition Authority (See Instructions on reverse)		Leave Blank (NARA Use Only)	
To: National Archives and Records Administration (NARA) Washington, DC 20408		Job Number NI-576-09-5	
1. From: (Agency or establishment) Office of the Director of National Intelligence		Date Received 8/26/09	
2. Major Subdivision Policy, Plans, and Requirements		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request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10.	
3. Minor Subdivision			
4. Name of Person with whom to confer John F. Hackett	5. Telephone (include area code) 703-275-2215	Date 27 Oct 11	Archivist of the United States <i>[Signature]</i>
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 <u>13</u> 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: <input checked="" type="checkbox"/> is not required <input type="checkbox"/> is attached <input type="checkbox"/> has been requested			
Signature of Agency Representative <i>John F. Hackett</i>		Title Director of Information Management	Date (mm/dd/yyyy) 7/22/2009
7. Item Number	8. Description of Item and Proposed Disposition	9. GRS or Superseded Job Citation	10. Action taken (NARA Use Only)
7/	Records of the Office of the Deputy Director of National Intelligence for Policy, Plans, and Requirements. See attached 13 pages.		

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**Office of the Director of National Intelligence
OFFICE OF THE DEPUTY DIRECTOR OF
NATIONAL INTELLIGENCE FOR POLICY, PLANS, & REQUIREMENTS**

Records Control Schedule

Mission Description

The Office of the Deputy Director of National Intelligence for Policy, Plans, & Requirements (DDNI/PPR) has responsibility for driving vital intelligence reform through policy development, management and oversight; modernizing security processes; building strategic partnerships with foreign, military, federal, domestic and private sector organizations; and developing IC-wide strategy, plans and requirements through open collaboration. Within DDNI/PPR are the Offices of the Assistant Deputy Director for Policy (P), the Assistant Deputy Director for Security (SEC), the Assistant Deputy Director for Strategic Partnerships (SP), and the Assistant Deputy Director for Strategy, Plans, and Requirements (SPR), and the Office of the Chief of Staff, which is part of the Front Office.

Application of the Records Control Schedule Disposition Instructions

The disposition instructions in the records control schedule are mandatory. Any Federal records received or created by Office of the DDNI/PPR personnel or contractors not specifically covered by this schedule or the General Records Schedules 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 Information Management Officer with responsibility for the Office of the DDNI/PPR 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 Office of the DDNI/PPR.

Note on Sensitivity of DDNI/PPR 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 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, such as law enforcement information or commercially sensitive ("trade secrets") information. An effort has been made to note these series.

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.

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Note on Electronic Records

The DDNI/PPR and staff maintain record copies of official files in electronic form on both shared and individual network drives. In addition, some staff members may keep some files on their individual local drives, although this is discouraged. Records kept on both the network and local individual drives that are not disposable under the General Records Schedules (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.

Records Descriptions and Disposition Instructions

Deputy Director for Policy, Plans, & Requirements

(PPR RCS Items 1 through 7 are Items applicable throughout PPR)

Item	Title & Description	Disposition
PPR 1.	PPR Subject Files. These are descriptions of files that are held throughout PPR.	
PPR-1a.	DDNI/PPR Correspondence Files. These files contain all outgoing correspondence signed or reviewed by the Deputy Director of National Intelligence/PPR. In many respects these files function as the DNI/PPR central file. Front Office Electronic files are kept on the S: Drive.	<p>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 in block is 30 years old.</p>
PPR-1b.	Substantive Program Records. These high-level and/or finished policy and program records contain information that adds to a proper understanding of the formation and development of significant final policy, decisions, or actions.	<p>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.</p>
PPR-1c.	Substantive Working Papers.	<p>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 in block is 30 years old.</p>
PPR-1c1.	Drafts and other work papers that were coordinated outside the unit of origin and contain information that	<p>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.</p>
PPR-1c1.	Drafts and other work papers that were coordinated outside the unit of origin and contain information that	<p>PERMANENT. Paper Records: If possible, file working papers with the final version of the</p>

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	<p>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.</p>	<p>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 30 years old.</p> <p>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 30 years old in a medium and format acceptable to NARA in accordance with standards set forth in Federal regulations.</p>
<p>PPR-1c2.</p>	<p>Drafts and associated materials related to final decisions, actions, products, or policies of transitory or routine significance.</p>	<p>TEMPORARY. Delete or destroy when 3 years old or when no longer needed, whichever is later.</p>
<p>PPR-1d.</p>	<p>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.</p>	<p>TEMPORARY. Screen annually and maintain in current files until no longer needed for business purposes, then delete or destroy.</p>
<p>PPR-2.</p>	<p>DDNI/PPR Calendars. Lotus Notes (or successor) databases or hard copy appointment books, wherever kept, containing the schedule and activities of the DDNI/PPR and other Front Office staff. 2005 to Present.</p>	
<p>PPR-2a.</p>	<p>DDNI/PPR Daily and Monthly File. DDNI/PPR and Associate DDNI/PPR calendars and schedule of front office activities, including the Group Leadership Calendar. Records of meetings and appointments, giving attendees, contact information, time, places, and other facilitative arrangements.</p>	<p>PERMANENT. Paper Records: Retain 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 in block is 30 years old.</p> <p>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.</p>
<p>PPR-2b.</p>	<p>Individual and Group Calendars for officials and units below Associate DDNI/PPR level.</p>	<p>TEMPORARY. Delete or destroy when 2 years old in accordance with GRS 23, Item 5a.</p>

<p>PPR-3.</p>	<p>DDNI/PPR Common Administrative Records. Office operating files and facilitative records, including administrative subject files, suspense files, tracking and control records, copies of contracts, routine budget and expenditure files, calendars below the senior level, indexes, 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.</p>	<p>TEMPORARY. Delete or destroy when 2 years old or when no longer needed per GRS 23, Item 1. For personnel-related records, delete or destroy as specified for type of record per GRS 1.</p>
<p>PPR-4.</p>	<p>DDNI/PPR Reference Files. Document reference library containing copies of intelligence products, memoranda, reports, budgets, publications, and other agency records maintained for convenience of reference.</p>	<p>TEMPORARY. Destroy when no longer needed or when superseded.</p>
<p>PPR-5. PPR-5a. PPR-5b.</p>	<p>DDNI/PPR Briefing, Speeches.</p> <p>DDNI/PPR External Briefings, Speeches. Records related to external briefings, speeches, meetings, and related materials that are disseminated to individuals and organizations outside of the ODNI.</p> <p>DDNI/PPR Internal Briefing, Speeches. Records related to internal briefings, speeches, meetings, and related materials that are disseminated by PPR personnel to other ODNI organizations.</p>	<p>PERMANENT. Paper Records: Retain 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 in block is 30 years old</p> <p>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.</p> <p>TEMPORARY. Review when 3 years old. Delete or destroy when no longer needed.</p>

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<p>PPR-6.</p>	<p>DDNI/PPR Records of Boards and Working Groups. Minutes, agendas, decision documentation, and copies of materials circulated at meetings, taken and collected by DDNI/PPR staff in course of executive secretarial functions. Filed under the name of the working group or board. Disposition based on the reach and authority of the boards with respect to Community-wide policy and policy implementation.</p>	
<p>PPR-6a.</p>	<p>Senior Level Board Records, such as those of the IC Policy Review Board and the Intelligence Policy Advisory Group.</p>	<p>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 in block is 30 years old.</p>
<p>PPR-6b</p>	<p>Staff Level Working Groups and Committee Records</p>	<p>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.</p> <p>TEMPORARY. Destroy when no longer needed or when superseded</p>
<p>PPR-7.</p>	<p>DDNI/PPR Web Pages Materials posted on PPR's internal and external Web pages. Items posted to these sites are for informational purposes and include internal official administrative and program documents or portions thereof that are covered under other items in this schedule (e.g. issuances, instructions, directives).</p>	<p>TEMPORARY. Destroy when no longer needed or when superseded.</p>

**Assistant Deputy Director
for Policy**

The key functions of the ADDNI/Policy are policy development, policy management, and policy oversight. The roles of this Office are: a. To ensure common understanding of the DNI's direction/guidance across the IC; b. To provide oversight of IC implementation of policy; c. To ensure that all IC policies are complementary not contradictory; and d. To provide the expertise necessary to determine whether policy is needed rather than changes to processes.

Item	Title & Description	Disposition
PPR-8.	<p>Policy Subject Files. Files on the shared drive containing all work products intended for circulation or needed for administrative control, within and outside of the component. Records document the primary mission of coordinating and overseeing the policies and activities of the Intelligence Community and include responses to Actions and inquiries, and input to the Policy Portal and other policy-related websites.</p>	
PPR-8a.	<p>ODNI Policy Records that specify significant final ODNI policy, decisions, or actions. Included are Intelligence Community Directives (ICDs); Intelligence Community Policy Memorandum (ICPMs); DNI Executive Correspondence (ECs); Intelligence Community Standard (ICs); Intelligence Community Policy Guidance (ICPG) and Director of Central Intelligence Directive (DCIDs) when they are policies inherited from pre-ODNI days and not yet replaced. Materials in these files include communication materials; pre-coordination drafts; initial, intermediate and final ODNI drafts; meeting minutes; coordination materials; review materials and other correspondence used in the development of the final policies.</p>	<p>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 in block is 30 years old.</p> <p>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.</p>
PPR-8b.	<p>Background reference materials for Policy Records, which are created ^{compiled} or received during the development the policy records above.</p>	<p>TEMPORARY. Review when 3 years old. Delete or destroy when no longer needed.</p>

**Assistant Deputy Director
for Security**

The ADDNI/Security is responsible for developing clear, uniform, Intelligence Community-wide security standards and practices governing such issues as access to facilities, electronic access to systems and databases, and clearance of personnel. The Office of ADDNI/SEC (SEC) consists of the Center for Security Evaluation (CSE) and the Special Security Center (SSC). The mission of CSE is to provide Intelligence Community advice and requirements to the Department of State in carrying out the Secretary's statutory responsibilities to develop and implement policies and programs for the protection of US diplomatic facilities and personnel abroad. SSC exists to assist the ODNI in sharing and protecting national intelligence information throughout the Intelligence Community (IC), the US Government, US contractors, state and local officials and our foreign partners. The SSC's objectives include promoting security uniformity and reciprocity in the IC to facilitate the sharing of vital intelligence with all of those who need it. A primary goal is to make security among IC agencies as seamless as possible, to include reciprocal access to IC facilities, electronic information systems and databases and IC-wide mutual acceptance of security clearances and access approvals.

Item	Title & Description	Disposition
PPR-9.	CSE Finished Intelligence Reports that are disseminated outside of CSE. This includes risk assessments, documents submitted to the Security Evaluation Threat List, and security issue files.	<p>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 in block is 30 years old.</p> <p>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.</p>
PPR-10.	CSE Finished Intelligence Production Files. Contains sources, background material, correspondence, distribution, tasking, drafts and preliminary versions for finished intelligence reports that are disseminated outside of CSE.	<p>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 in block is 30 years old.</p> <p>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.</p>

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<p>PPR-11.</p>	<p>CSE Technological Evaluation Files. CSE files of reports and documentation related to technical issues discovered in various sites and installations. Also included are evaluations of technologies to be added to the approved product lists for new construction.</p>	<p>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 in block is 30 years old.</p> <p>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.</p>
<p>PPR-12.</p>	<p>CSE US Diplomatic Facilities Construction Security Files. Files concerning new construction or major renovation projects at US diplomatic posts abroad proposed by the Department of State (DOS) that require CSE concurrence.</p>	<p>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 in block is 30 years old.</p> <p>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.</p>
<p>PPR-13.</p>	<p>National Intelligence Emergency Management Records. Records and files maintained for planning and dealing with national emergencies including, but not limited to, Continuity of Operations, Continuity of Government and Enduring Constitutional Government records.</p>	<p>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 in block is 30 years old.</p> <p>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.</p>
<p>PPR-14.</p> <p>PPR-14a.</p>	<p>Special Security Center (SSC) Crimes Reporting.</p> <p>IC-Initiated and ODNI-Initiated Reports related to leaks of classified information where the reporting agency initiates a formal investigation with the Department of Justice for official prosecution.</p>	<p>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 in block is 30 years old.</p>

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<p>PPR 14b.</p>	<p>Background, input and reference materials used to generate crimes reports. Also includes files related to reports where the reporting agency does not initiate a formal investigation.</p>	<p>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.</p> <p>TEMPORARY. Review when 3 years old. Delete or destroy when no longer needed.</p>
<p>PPR-15.</p>	<p>SSC Programmatic Materials, Data Calls and Training Materials. Records and files dealing with Security related policy and training.</p>	<p>TEMPORARY. Review when 3 years old. Delete or destroy when no longer needed.</p>
<p>PPR 16.</p> <p>PPR 16a.</p>	<p>SSC Controlled Access Program Coordination Office. Contains oversight information on the management of compartmented programs created under DNI authorities.</p> <p>SSC Controlled Access Program Coordination Office materials related to programs specifically authorized to remain classified for 50 years.</p>	<p>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.</p> <p>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.</p> <p>(Note: Some records document a 50 year file series exemption and therefore must be retained in ODNI storage for 50 years to provide a record of this exemption).</p>
<p>PPR 16b.</p>	<p>SSC Controlled Access Program Coordination Office substantive program records related to all other programs, such as the Authorized Classification and Control Markings Register and the Intelligence Community Classification and Control Markings Implementation Manual.</p>	<p>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 in block is 30 years old.</p> <p>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</p>

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		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
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**Assistant Deputy Director
for Strategic Partnerships**

The Office of the Strategic Partnerships (SP) consists of groups for Federal and Domestic Support, Foreign and Military Support, and Special Programs. This Office is responsible for streamlining ODNI relationships with DNI Representatives abroad and with domestic, Federal, and private sector partners. The offices within SP collectively work to meet the challenge of improving foreign, military, and domestic intelligence integration.

Item	Title & Description	Disposition
PPR-17.	Strategic Partnership Subject Files. Files on the shared drive containing all work products intended for circulation or needed for administrative control, within and outside of the component. Files are a mixture of facilitative documentation and materials providing substantive background on the development of new approaches to intelligence analysis and information sharing.	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 in block is 30 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 30 years old in a medium and format acceptable to NARA in accordance with standards set forth in Federal regulations.
PPR-18.	Visit and Travel Final Briefing Books prepared for DNI, PDDNI, DIS, and DDNI/PPR officers when they meet with foreign leaders, partners, and travel abroad.	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 in block is 30 years old. Electronic Records: Maintain electronic report 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.
PPR-19.	Foreign Disclosure Records. Contains documentation, including intelligence products and correspondence, regarding intelligence shared with foreign governments; lists of individuals authorized to disclose or release information to foreign entities; and records of information released to foreign governments at the request of and by the National Security Council.	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 in block is 30 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 30 years

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		old in a medium and format acceptable to NARA in accordance with standards set forth in Federal regulations.
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**Assistant Deputy Director
for Strategy, Plans, and Requirements**

The ADD for Strategy, Plans and Requirements (SPR) consists of groups for Strategy, Plans Development, and Plans Implementation. SPR serves as the engine of change within the Intelligence Community. They promote an open collaborative approach to the development of Community strategy, plans, and requirements. Their goal is to realize the DNI's vision of a globally networked Intelligence Enterprise through strategic perspectives, innovation, and a drive for continuous improvement.

Item	Title & Description	Disposition
PPR-20.	<p>Finished Strategic and Planning Documents Includes a broad range of final reports and documents such as: National Intelligence Strategy, Planning Guidance, Plans, summary documents, studies, analytical reviews and other published and/or distributed documents.</p>	<p>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 in block is 30 years old.</p> <p>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.</p>