

Records and Information Governance Course

Six hours live on federal recordkeeping — records versus non-records, the lifecycle, retention and disposition schedules, litigation holds, and records created in email, chat and collaboration tools.

Group classes in Live Online and onsite training is available for this course. For more information, email onsite@graduateschool.edu or visit: <https://www.graduateschool.edu/courses/records-and-information-governance>



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Course Outline

Module 1

- Foundations of Federal Records and Information Governance (45 min)
- What a record is under the Federal Records Act versus convenience copies, drafts and personal materials
- Why recordkeeping matters legally, historically and operationally
- The federal records management structure from Records Officer and Senior Agency Official through NARA's oversight role
- Every employee's baseline responsibilities. Includes a record versus non-record sorting activity.

Module 2

- The Records Lifecycle and Recordkeeping Requirements (60 min)
- Creation and receipt, maintenance and use, and disposition
- Keeping records accessible, organized and protected
- Common pitfalls including records scattered across personal drives and inboxes, inconsistent filing, and failure to capture records from mobile devices or personal accounts used for work
- Litigation holds and preservation duties. Includes a lifecycle sequencing activity.

Module 3

- Retention and Disposition Schedules (80 min)
- What a records schedule is and why every record needs an approved disposition authority
- How General Records Schedules provide government-wide authorities and when an agency-specific schedule applies instead
- Temporary versus permanent records and what happens at the end of a retention period
- Event-driven versus time-driven disposition triggers
- Unauthorized or accidental destruction and the duty to report
- How a hold or pending FOIA request suspends disposition. Includes a record-type to disposition matching activity.

Module 4

- Electronic Records and Email Management (80 min)
- The government-wide move to electronic recordkeeping
- Email as a federal record and how retention applies to it like anything else
- Records created on chat, messaging and collaboration platforms
- The role of metadata in keeping electronic records usable, retrievable and trustworthy
- What electronic recordkeeping systems do generically
- Practical habits including filing and tagging, avoiding personal email and unauthorized apps for official business, and keeping records accessible through role changes and departures. Includes scenario-based decision prompts.

Module 5

- How Records Governance Connects to Privacy, FOIA, and CUI (30 min)
- Why one record can carry several obligations at once
- How good records practice is what makes a FOIA response possible
- How many federal records are also CUI. Deliberately brief, and deliberately does not re-teach privacy, FOIA or CUI. Includes a which-course-covers-this activity.

Module 6

- Governance in Practice: Roles, Compliance, and Continuous Improvement (65 min)
- Individual, supervisory and organizational responsibilities
- Recurring compliance activities including annual training and periodic self-assessment
- Vital records and continuity considerations
- Building good habits and knowing who to ask. Ends with an integrated capstone scenario following a single workday from drafting a memo, through discussing it in chat and emailing a final version, to reaching the end of a retention period.