



**USAID**  
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# USAID Washington Disposition Schedule Chapter 8: Program and Policy Coordination Records

A Mandatory Reference for ADS Chapter 502

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USAID WASHINGTON DISPOSITION SCHEDULE

CHAPTER 8 PROGRAM AND POLICY COORDINATION RECORDS – These records are cutoff annually, by fiscal year, unless stated otherwise.

| ITEM NO. | DESCRIPTION OF RECORDS   | AUTHORIZED DISPOSITION   |
|----------|--|--|
| 08010    | <p><b><u>Donor Coordination Files</u></b></p> <p><b><u>International Organizations Files</u></b></p> <p>a. <b><u>Correspondence, reports agendas, and minutes of meetings of consultative groups and subsidiary and affiliated organizations</u></b> regarding development assistance and USAID liaison with such organizations.</p> | <p><b>Permanent.</b> Hold in office for 3 yrs., then retire to WNRC. Offer to NARA in 5 yr. blocks, when most recent record is 10 yrs. old. (e.g., in 1987 offer 1973-77 records.)</p> |
| 08020    | <p>b. <b><u>Working papers</u></b> for conference sessions, such as delegate lists, admission cards and badges, correspondence on arrangements, and duty schedules.</p>  | <p><b>Temporary.</b> Destroy 1 yr. after date of conference.</p>   |
| 08030    | <p>c. <b><u>Files regarding programs of the UN and its affiliated organizations</u></b>, which show a relation to cooperating countries and USAID liaison.</p>   | <p><b>Permanent.</b> Hold in office for 3 yrs. , then retire to WNRC. Offer to NARA in 5 yr. blocks, when most recent record is 10 yrs. old.</p>                                       |
| 08040    | <p>d. <b><u>Reports of international conferences</u></b> attended, providing the Administrator with a brief report of the conference or meeting.</p>   | <p><b>Permanent.</b> Hold in office for 3 years, then retire to WNRC. Offer to NARA in 5 yr. blocks, when most recent record is 10 yrs. old.</p>                                       |
| 08050    | <p>e. <b><u>Development Assistance Coordination (DAC) donor files</u></b>, consisting of correspondence and other documents relating to specific donors, bilateral relations between USAID and others, and information on various donor programs.</p>  | <p><b>Permanent.</b> Hold in office for 3 years, then retire to WNRC. Offer to NARA in 5 yr. blocks, when most recent record is 10 yrs. old.</p>                                       |
| 08060    | <p><b><u>National Advisory Council on International Monetary and Financial Policies Files</u></b> – Files accumulated by USAID documenting the activities of the Council, chaired by the Treasury Department, and its periodic meeting.</p>  | <p><b>Temporary.</b> Hold in office for 3 yrs., then retire to WNRC. Destroy when 10 yrs. old.</p>   |
| 08070    | <p><b><u>Multilateral Development Banks Files</u></b> – Files documenting USAID's relations with multilateral development banks, such as the World Bank, International Development bank, etc., consisting of minutes of meetings, bank policy statements, and related correspondence.</p>  | <p><b>Permanent.</b> Hold in office for 3 yrs., then retire to WNRC. Offer to NARA in 5 yr. blocks, when most recent record is 20 yrs. old. (e.g., in 1987 offer 1963-67 records).</p> |

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|--------------------|---|---|
| 08080              | <p><b><u>Program Evaluation Files</u></b> – Correspondence, reports, special studies, and other records pertaining to Agency evaluative research, socioeconomic impact assessments, and program evaluation development issues and USAID programs.</p> <p>a. <b><u>Records include Impact Evaluation Reports, Discussion Papers, Special Studies, Program Evaluation Reports, and Program Design and Evaluation Methods Files.</u></b></p>   | <p><b>Permanent.</b> Hold in office for 3 yrs., then retire to WNRC. Offer to NARA in 5 yr. blocks when most recent record is 20 yrs. old.</p>  |
| 08090              | <p>b. <b><u>Background files and related correspondence.</u></b></p>  | <p><b>Temporary.</b> Hold in office for 3 yrs., then retire to WNRC. Destroy when 6 yrs. old.</p>   |
| 08100              | <p><b><u>Project Evaluation Summaries (PES) Files</u></b> – Files pertaining to in-depth studies and analyses of the social and economic impact of alternative types of strategies, programs, and projects on the lives of foreign assistance beneficiaries. Included are copies of studies and analyses and related correspondence. These files are not duplicated in the Impact Evaluation records (item 08080 above).</p>  | <p><b>Permanent.</b> Hold in office for 3 yrs., then retire to WNRC. Offer to NARA in 5 yr. blocks when most recent record is 20 yrs. old.</p>  |
|                    | <p><b><u>Budget Files</u></b><br/> <b><u>Agency Budget Submission Files</u></b></p> <p>See <b><u>Budget Records of Chapter 1. Records Common to Most Offices (01130 – 01150)</u></b></p>  |   |
| GRS 23,<br>Item 10 | <p><b><u>Electronic Mail (E-mail) and Word Processing (WP) System Copies</u></b> - Electronic copies of records that are created on E-mail and WP systems and used solely to generate a recordkeeping copy of the records described in this chapter. Also includes electronic copies of records created on E-mail and WP systems that are maintained for updating, revision, or dissemination.</p> <p>a. Copies that have no further administrative value after the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal e-mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recordkeeping copy.</p> <p>b. Copies used for dissemination, revision, or updating that are maintained in addition to the recordkeeping copy.</p> | <p><b>Temporary.</b> Destroy or delete with 180 days after the recordkeeping copy has been produced.</p> <p><b>Temporary.</b> Destroy or delete when dissemination, revision, or updating is completed.</p> |