



USAID
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USAID Mission Disposition Schedule Chapter 26: Project Assistance Records

A Mandatory Reference for ADS Chapter 502

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USAID MISSION DISPOSITION SCHEDULE

CHAPTER 26 PROJECT ASSISTANCE RECORDS – These records are cutoff annually, by fiscal year, unless stated otherwise.

ITEM NO. DESCRIPTION OF RECORDS

AUTHORIZED DISPOSITION

These records relate to the USAID Development Assistance Program. Assistance is provided in the form of loans and grants for improving the quality of life of people in less developed countries through programs in agriculture, rural development, nutrition, family planning, health education and human resources, energy, private industry development, and science and technology. See Chapter 29 for Housing and Urban Development Project Files.

26010	<p>Project Files - Case files on technical and capital assistance projects, consisting of studies, surveys, Project Identification Documents, Project Papers, loan and grant agreements and amendments, Project Implementation Letters, contracts, reports, and other related records and correspondence.</p> <p>a. Loan Files</p>	<p>Temporary. Destroy 3 yrs. after project activity completion date.</p>
26020	<p>b. Grant Files</p>	<p>(same as (a.) above)</p>
26030	<p>Project Plan Files - Copies of engineering plans relating to individual projects.</p>	<p>Temporary. Destroy in accordance with Item 26010 above</p>
26040	<p>Participant Training Files</p> <p>a. Participant trainee case files, containing PIO/Ps, bio-data, training plans, budgets, notice of return, course records, report, etc.</p>	<p>Temporary. Cut off project activity completion date. Transfer pertinent summary data to card files or computer tapes as appropriate. Destroy 3 yrs. after project activity completion date, whichever is sooner. (N1-286-89-1)</p>
26050	<p>b. Printouts containing summary data for each trainee or training project.</p>	<p>Temporary. Destroy upon termination of overseas office or when no longer needed, whichever is sooner.</p>
26060	<p>c. Computer tapes containing summary data for trainees or training project.</p>	<p>Temporary. Destroy upon termination of overseas office or when no longer needed, whichever is sooner.</p>
26070	<p>d. Card files and other summary data for each trainee or training project (except computer tapes and printouts and reports described above).</p>	<p>Temporary. Destroy upon termination of overseas office or when data is transferred to computer tapes at overseas offices, or when no longer needed, whichever is sooner.</p>

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ITEM NO.	DESCRIPTION OF RECORDS	AUTHORIZED DISPOSITION
26080	<p><u>Project Reports Files</u></p> <p><u>Project Review Summary Reports</u> - Copies of summary progress reports and related correspondence on the implementation of all projects. Included in this item are similar types of recurring reports on project implementation used at the discretion of individual missions.</p>	<p>Temporary. Destroy when 2 yrs. old.</p>
26090	<p><u>Country Development Strategy Statement (CDSS) File</u></p> <p>a. <u>Formal Statements</u> on the country foreign aid assistance program are submitted to USAID/W annually. These statements are printed, bound, and issued by USAID/W.</p>	<p>Temporary. Destroy when 5 yrs. old.</p>
26100	<p>b. <u>Work papers</u></p>	<p>Temporary. Destroy when formal CDSS is issued.</p>
26110	<p><u>Project Procurement Advice Files</u> - Reports and correspondence pertaining to advice provided project officers on procurement actions under project agreements.</p>	<p>Temporary. Cut off annually. Destroy when 3 yrs. old.</p>
GRS 23, Item 10	<p><u>Electronic Mail (E-mail) and Word Processing (WP) System Copies</u> - 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>Temporary. Destroy or delete within 180 days after the recordkeeping copy has been produced.</p> <p>Temporary. Destroy or delete when dissemination, revision, or updating is completed.</p>