

RECORDS DISPOSITION SCHEDULE 67

POLICY DEVELOPMENT AND RESEARCH RECORDS

This Schedule provides disposition instructions for Headquarters and Field Office records produced in connection with activities conducted under Title V of the Housing and Urban Development Act of 1970 (P.L. 91-609, 84 Stat. 1784; 12 U.S.C. 1701z-1).

<u>Item No.</u>	<u>Description of Records</u>	<u>Disposition</u>
1.	General Subject Files pertaining to the administration and management of all Policy Development and Research activities and programs. All Headquarters Office Files.	Break files annually. Destroy when 3 years old. (NARA Job NC1-207-78-6, item 1)
2.	Chronological files pertaining to all Policy Development and Research activities and programs.	Break files annually. Destroy when 3 years old. (NARA Job NC1-207-78-6, item 2)
3.	Reference copies of opinions, policy and procedural issuances, interpretations, informational releases and publications, and any related published materials.	Destroy when superseded or obsolete, or when no longer needed for administrative use. (NARA Job NC1-207-78-6, item 3)
4.	General subject files (facilitative and housekeeping records).	Destroy. Use applicable General Records Schedules.
5.	Project case files reflecting a complete history of each project from initiation through research, development, design, testing, and demonstration.	Retire to Federal Records Center 3 years after satisfactory close of project that volume warrants. Destroy 6 years after satisfactory close of project. (NARA Job NC1-207-78-6, item 5)
6.	Headquarters records relating to projects determined by the Assistant Secretary for Policy Development and Research or designee to have high research value consisting of the following types of records:	<u>PERMANENT</u> . Offer to the National Archives when project is satisfactorily closed and records are no longer needed for administrative purposes. (NARA Job NC1-207-78-6, item 6)
a.	One copy of each publication including final reports, summaries, and brochures, produced by or submitted to HUD in order to fulfill contract requirements.	

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b.	Newspaper clippings arranged chronologically or by subject and mounted in binders.	
c.	News releases, arranged chronologically.	
d.	Speeches of the Secretary, Assistant Secretary, or project director, arranged chronologically or by subject.	
e.	Slides, photographs, motion pictures and other audiovisual records which meet the criteria for permanent records in GRS 21, items 1a and 2a.	
f.	Plans, drawings, and other cartographic records which are maintained separately from the case files and which meet the criteria for permanent records in GRS 22.	
7.	Disapproved and withdrawn applications and proposals on which no contract was executed.	Destroy 3 years after disapproval or withdrawal. (NARA Job NC1-207-78-6, item 7)
8.	Cancelled, suspended, or terminated projects on which a contract was executed.	Destroy 3 years after close of final audit and settlement of account. (NARA Job NC1-207-78-6, item 8)
9.	Economic and Market Analysis Records.	
a.	Housing Market Analyses.	
(1)	Record copy of published housing market analysis reports, or final report if not published, used by Federal officials in determining actions to be taken regarding the housing market. Headquarters or Field Offices.	<u>PERMANENT</u> . Offer to National Archives or appropriate Regional Archives Branch when 15 years old. (NARA Job NC1-207-78-6, item 9a(1))

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	(2) Background files for the housing market analysis reports consisting of drafts, notes, questionnaires and other working papers.	Retire to Federal Records Center when 6 years old. Destroy when 15 years old. (NARA Job NC1-207-78-6, item 9a(2))
b.	Approved schedules of maximum income limits. Files contain record copies of statutory income limit approvals, including separate approval forms for individual localities and counties, and group approval documents in the form of memoranda and computer printout lists. Schedules pertain to the following programs: (1) Rent Supplement; (2) Regular Section 235 and 236; (3) Section 221(d)(3) Below-Market Interest Rate (BMIR); (4) Exception limits for Sections 235 and 236; (5) Housing and Community Development Act, Section 235; (6) HCD Act, Section 236; (7) HCD Act, Section B Low Income; and (8) HCD Act, Section 8 Very Low Income.	Destroy when 6 years old. (NARA Job NC1-207-78-6, item 9b)
c.	Unsold Inventory Survey. Files contain record copies of summary sheets of Survey data by standard Metropolitan Statistical Area, including price distribution and National Summaries listing totals only.	Destroy when superseded or obsolete. Review annually. (NARA Job NC1-207-78-6, item 9c)
d.	Postal Vacancy Survey. Files contain record copies of Summary Reports for individual localities and semiannual National Summaries.	Destroy when superseded or obsolete. Review annually. (NARA Job NC1-207-78-6, item 9d)

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e.	General Economic and Market Analysis Correspondence and Administrative files. Files include correspondence with HUD Field Offices, Federal agencies, private organizations and individuals.	Break files annually. Maintain current and 2 preceding years, and then destroy. (NARA Job NCI-207-78-6, item 9e)
f.	Reference files pertaining to the market analysis function. Files include economic, population, and real estate data; census data and vital statistics; real estate and economic library materials; published reports; administrative and technical issuances; and instructive material used as a working tool in market analysis research.	Destroy when superseded or obsolete. Review annually. (NARA Job NCI-207-78-6, item 9f)