

MANAGEMENT ANALYSIS AND REVIEW (MAR)

The management review and analysis of Agency programs to determine their progress, accomplishments, and deficiencies; development and initiation of changes in the manner or method of planning, directing, controlling, or performing work; simplifying work methods including work programming and manpower utilization; work measurement; and work standards.

EXCEPT: Review and analysis to develop, change, or modify paperwork systems, including automated systems. See PDM.

EXCEPT: MPI in plant Reviews. SEE PIV 7.

1. MANAGEMENT ANALYSIS AND REVIEW

General material too broad in scope to be filed in one of the subject categories listed below.

Disposition: Temporary

Recordkeeping Copies: Destroy when 3 years old.

Disposition Authority: (NC1-310-77-2, item 179a)

2. POLICY

Policy and guidelines covering all subjects included under this primary subject. If needed, subdivide by type or subject of policy and cross-reference to appropriate subject category.

EXCEPT: Published instructions or directives which are filed in binders according to established Agency custom.

Disposition: Temporary

Recordkeeping Copies: Retire to Federal Records Center (FRC) when 10 years old. Destroy when 20 years old.

Disposition Authority: (NC1-310-77-2, item 180a)

3. REPORTS AND STATISTICS

Reports covering all subjects included under this primary subject. Includes annual report to Congress. Case file by type of report as necessary.

EXCEPT: Final project reports which should be filed under MAR 6.

- a. Record copy of substantive reports, such as annual summaries, and comprehensive nonrecurring reports. Case file special or one-time reports as needed.

Disposition: Temporary

Recordkeeping Copies: Retire to FRC when 10 years old. Destroy when 15 years old.

Disposition Authority: (NC1-310-77-2, item 181a)

- b. Agency copy of above reports.

Disposition: Temporary

Recordkeeping Copies: Destroy when superseded or obsolete.

Disposition Authority: (NC1-310-77-2, item 182a)

- c. All other reports.

Disposition: Temporary

Recordkeeping Copies: Destroy when 2 years old.

Disposition Authority: (NC1-310-77-2, item 183a)

- d. Activity Reports

Summaries of specific action or work performed by program or administrative personnel.

Disposition: Temporary

Recordkeeping Copies: Destroy when 2 years old.

Disposition Authority: (GRS 23, item 1)

4. COMMITTEES, MEETINGS

See [General Administration / Boards and Committees](#)

5. ANALYSIS AND REVIEW

- a. General material dealing with the review and analysis of progress and/or deficiencies of Agency administration or program.

Disposition: Temporary

Recordkeeping Copies: Destroy when 3 years old.

Disposition Authority: (NC1-310-77-2, item 188a)

- b. Case file administrative or program consultative, and analytical services, by program, State, or office depending upon subject, scope, and/or purpose of review. Includes final report and all supporting material such as documents reflecting actual performance, progress, accomplishments, deficiencies, and problems in relation to administrative or program goals. Includes any Government Accounting Office (GAO), Office of Inspector General (OIG), Office of the Administrator (OA), and Office of General Counsel (OGC) reports dealing with performance of the Agency administration or programs.

- (1) Agency reviews consisting of reviews of program operations.

Disposition: PERMANENT

Recordkeeping Copies: Retire to FRC when 10 years old. Transfer to NARA when 15 years old.

Disposition Authority: (NC1-310-77-2, item 189a)

- (2) Other reviews.

EXCEPT: Files involving APHIS employees. See PER.

Disposition: Temporary

Recordkeeping Copies: Destroy after second subsequent review or when 10 years old, whichever occurs first.

Disposition Authority: (NC1-310-77-2, item 190a)

c. Audits and Investigations

- (1) General material dealing with the review and analysis of administrative and Agency programs by GAO, OIG, OA, OGC, and others.

Disposition: Temporary

Recordkeeping Copies: Destroy when 3 years old.

Disposition Authority: (NC1-310-77-2, item 191a)

- (2) Case file GAO, OIG, OA, OGC, etc., audits and investigations by name (and location, if needed).

EXCEPT: Audits and investigations made part of a case file. See PIV, MAR 5, or MAR 6, as appropriate.

EXCEPT: Files involving APHIS employees. See PER.

Disposition: Temporary

Recordkeeping Copies: Destroy 5 years after case is closed or final action taken.

Disposition Authority: (NC1-310-77-2, item 192a)

6. MANAGEMENT IMPROVEMENT

- a. General material relating to reviews or studies which may result in the initiation of changes in the manner or method of planning, directing, controlling, or performing work which results in increased effectiveness, efficiency, and economy.

Disposition: Temporary

Recordkeeping Copies: Destroy when 3 years old.

Disposition Authority: (NC1-310-77-2, item 193a)

- b. Case file reviews or studies by program and/or by location where review or study was performed.

Disposition: Temporary

Recordkeeping Copies: Destroy 5 years after all action has been taken or upon receipt of second subsequent report, whichever is earlier.

Disposition Authority: (NC1-310-77-2, item 194a)

7. PROJECTS

- a. General material on projects.

Disposition: Temporary

Recordkeeping Copies: Destroy when 3 years old.

Disposition Authority: (NC1-310-77-2, item 195a)

- b. Reference material.

Disposition: Temporary

Recordkeeping Copies: Destroy when superseded or obsolete.

Disposition Authority: (NC1-310-77-2, item 196a)

- c. Case file records and related correspondence on approved projects or task forces having precedential significance. Includes basic documentation and final report or other substantive material. Show title and date span of project as: MAR 6 PROJECT NO. 00 Task force - APHIS Reorganization FY 77.

Disposition: PERMANENT

Recordkeeping Copies: Retire to FRC when 10 years old. Transfer to NARA when 15 years old.

Disposition Authority: (NC1-310-77-2, item 197a)

- d. All other projects.

Disposition: Temporary

Recordkeeping Copies: Destroy 5 years after completion of project.

Disposition Authority: (NC1-310-77-2, item 198a)

- e. Proposed projects.

Disposition: Temporary

Recordkeeping Copies: Destroy when 5 years old, if no further action is taken.

Disposition Authority: (NC1-310-77-2, item 199a)

- f. Work papers and draft report of project.

Disposition: Temporary

Recordkeeping Copies: Destroy 3 years after completion of project and final report.

Disposition Authority: (NC1-310-77-2, item 200a)

8. WORK SIMPLIFICATION

- a. Material on work simplification including work programming, manpower utilization, and work measurement. Includes time and motion studies, established workload, assignment computations, and summary report.

EXCEPT: Work measurement studies incorporated into work standards. See MAR 7-3.

Disposition: Temporary

Recordkeeping Copies: Destroy when 4 years old.

Disposition Authority: (NC1-310-77-2, item 201a)

- b. Work Plans

Work plans and accomplishments. Subdivide as necessary.

EXCEPT: Program work plans supporting budget submissions. See BUD 4.

EXCEPT: Program work plans relating to specific plant pests. See PLP 10.

Disposition: Temporary

Recordkeeping Copies: Destroy 4 years after work plan is completed or implemented or when 4 years old if no further action is taken.

Disposition Authority: (NC1-310-77-2, item 203a)

c. Work Standards

- (1) General material on work standards.

Disposition: Temporary

Recordkeeping Copies: Destroy when 4 years old.

Disposition Authority: (NC1-310-77-2, item 204a)

- (2) Case file work standards by subject or type of standard.

- (a) Approved work standards.

Disposition: Temporary

Recordkeeping Copies: Destroy 5 years after standard superseded or obsolete.

Disposition Authority: (NC1-310-77-2, item 205a)

- (b) Proposed work standards.

Disposition: Temporary

Recordkeeping Copies: Destroy when 4 years old, if no further action is taken.

Disposition Authority: (NC1-310-77-2, item 206a)