

MassHousing Public Records Guidelines

These guidelines describe the types of records that MassHousing generates and receives. Part I identifies those categories of MassHousing records that are identified in the Massachusetts Statewide Record Retention Schedule published by the Records Conservation Board, 02-11 (as amended), although not all types of records described in any particular subcategory may apply to MassHousing. Part II includes those records related to MassHousing's primary programs. Please note that most records set forth in Part II are likely "A5 Program Administration" records under the Schedule, but are more specifically identified in these guidelines to promote records access.

Part I – Records Described in the Massachusetts Statewide Record Retention Schedule

A. Administration and Records in Common

- A1 Program Development and Review
- A2 Legislation and Policy
- A3 Executive
- A4 Committee
- A5 Program Administration
- A6 Office Management
- A7 Program Relations
- A8 Public Relations
- A9 Special Events
- A10 Special Projects
- A11 Correspondence
- A12 Public Bodies Subject to the Open Meeting Law

B. Legal and Regulatory

- B1 Legal Review
- B2 Public Records
- B3 Investigation and Monitoring
- B4 Regulatory and Compliance
- B5 Litigation

C. Facilities, Transportation and Construction

- C1 Facilities Management
- C2 Construction Legal
- C3 Construction Planning
- C4 Pre-Construction
- C5 Construction Management
- C7 Real Estate and Land Use

D. Fiscal

- D1 Accounting
- D2 Development and Review
- D3 Grants and Aid
- D4 Payroll

E. Personnel

- E1 Program Administration
- E2 Recruitment and Hiring

- E3 Affirmative Action/EO
- E4 Employee
- E5 Personnel Actions
- E6 Accident and Injury

F. Information and Records Management

- F1 Unclassified
- F2 Reference
- F3 Facilitative
- F4 Media/Format
- F5 System Infrastructure
- F6 Systems Operations
- F7 System Data

L. Revenue and Taxation

- L12 Insurance
- L14 Retirement and Benefits

Part II – Program Records

(1) Homeownership Records

- a. Business Development Records
- b. Loan Origination Records
- c. Secondary Marketing Records
- d. Loan Servicing Records
- e. Mortgage Insurance Fund Records

(2) Multifamily Records

- a. Multifamily Lending
 - i. Business Development Records
 - ii. Loan Underwriting Records
 - iii. Construction Monitoring & Loan Disbursement Records
 - iv. Loan Closing Records
- b. Multifamily Asset Management Records
- c. HUD Section 8 Contract Administration Records

(3) Diversity and Inclusion Records

(4) Chapter 40B Records