

# BGSU Schedule of Records Retention Office: Northwest Ohio Regional Book Depository-University Libraries

In accordance with ORC Section 149.33 and Bowling Green State University Board of Trustees, a schedule of Retention and Destruction for the following records is hereby established. The records covered by this schedule, upon expiration of the retention period, shall be destroyed unless otherwise specified. No record shall be destroyed that pertains to any pending claim, action, litigation, or request.

**Approvals:** Department Official: Signed Date: 07/23/2012  
Records Manager: Signed Date: 08/06/2012

Please note that this schedule applies to records in both paper and/or electronic format.

Schedule Number	Record Series Title	Retention Period
135-01	<b>Annual Reports/Business Plans:</b> For the Northwest Ohio Regional Book Depository	3 years, then transfer to the University Archives
135-02	<b>Budget &amp; Financial Files:</b> Includes financial accounting statements, budget preparation documents, foundation reports, income reports. Includes student budget requests.	4 years, then destroy
135-03	<b>Building Maintenance Requests &amp; Logs:</b> Includes temperature and humidity logs	3 years, then destroy
135-04	<b>Committee Files, Building or Library:</b> Agendas, minutes, correspondence, reports, etc. Includes Building Safety Committee records	3 years, transfer to Archives
135-05	<b>Correspondence, Executive:</b> Deals with significant aspects of the administration of the office, policy, program, fiscal, personnel matters, procedures, or workflows.	2 years, then transfer to University Archives

Schedule Number	Record Series Title	Retention Period
135-06	<b>Correspondence, General:</b> Includes internal letters and memos; correspondence from various individuals, companies, and organizations requesting information pertaining to agency and legal interpretations, reference inquiries, and other miscellaneous inquiries. This correspondence is informative (it does not attempt to influence policy).	Retain 1 year, then destroy in a manner protecting confidentiality.
135-07	<b>Correspondence, Routine:</b> Referral letters, requests for routine information or publications, setting appointments, etc. Most inquiries answered by standard form letters.	Destroy after no longer of administrative value
135-08	<b>Drafts:</b> Preliminary outlines of a plan or document.	Retain until superseded, or issuance of final report or policy
135-09	<b>Employee Handbooks:</b> Includes departmental training manuals.	Retain until superseded; appraise for transfer to archives.
135-10	<b>Interlibrary Loan (ILL) Request Forms -- Articles</b>	Active + 3 years, then destroy
135-11	<b>ILL Requests -- Books</b>	Active + 1 year, then destroy
135-12	<b>ILL Lending Paperwork (Lost Materials)</b>	Active + 3 years, then destroy
135-13	<b>Inventories:</b> Shelf lists and other inventories maintained for disaster recovery purposes	Retain at least 5 years, then keep until no longer of administrative value
135-14	<b>Lists/Directories</b>	Retain until superseded, obsolete, or replaced, then dispose.
135-15	<b>Monthly Reports/Statistics:</b> Includes statistics reported to OBOR and OhioLink	Retain until annual report is compiled, then destroy.
135-16	<b>Personnel Records (copies) - Staff &amp; NSLAs:</b> May contain copies of contracts, hiring documentation, evaluation summaries, certifications, reclassifications, etc.	Destroy upon termination. Official file maintained by Human Resources.
135-17	<b>Personnel Records (copies) - Students:</b> Hire/rehire forms (copies), Kronos summary reports, termination forms (copies), annual evaluations.	3 years after date of last activity, then destroy. Student Employment maintains official record.

<b>Schedule Number</b>	<b>Record Series Title</b>	<b>Retention Period</b>
<b>135-18</b>	<b>Staff and Faculty Search Committee Records:</b> May include job posting, list of candidates, final report	Destroy after search is complete. Office of Equity and Diversity maintains official record.
<b>135-19</b>	<b>Student Employee &amp; NSLA Search Records:</b> May include job posting, resumes, application forms.	One year after position is filled, then destroy.
<b>135-20</b>	<b>Transient Records:</b> Have very short-lived administrative, legal or fiscal use. May include telephone messages, inner-office forms, etc.	Destroy once no longer of use; dispose of as soon as allowable.