

BGSU Schedule of Records Retention

Office: University Libraries—Dean’s Office

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: 04/03/2012

Records Manager: Signed

Date: 04/03/2012

PLEASE NOTE THAT THIS SCHEDULE APPLIES TO RECORDS IN BOTH PAPER AND/OR ELECTRONIC FORMAT

Schedule Number	Record Series Title	Retention Period
13-1	Annual Report	3 years; transfer to Archives
13-2	Appointment Books Includes bookings of conference rooms in building	1 year; then destroy
13-3	Building Maintenance Request Logs	3 years, then destroy
13-4	Committee Files, Library Agendas, minutes, correspondence, reports for library committees, task forces, and functional working groups. Includes Library Faculty, UL Council, Management, Advisory Group, UL Classified Staff Council, etc.	3 years; transfer to Archives
13-5	Committee Files, Development & Foundation Agendas, minutes, correspondence, reports for Friends of the Library and the UL Advocates Board	3 years, transfer to Archives
13-6	Conference/Special Events Files	3 years; destroy menus, invoices; transfer remainder to Archives
13-7	Correspondence, Executive	Retain 3 years, then appraise for transfer to Archives.

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	Deals with significant aspects of the administration of the offices. Policy, program, fiscal or personnel matters.	
13-8	Correspondence, General Includes internal letters and memos; also correspondence from various individuals, companies, and organizations requesting information pertaining to agency and legal interpretations and other misc. inquiries. This correspondence is informative (it does not attempt to influence policy).	Retain 1 year, then destroy
13-9	Correspondence, Routine 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
13-10	Curriculum Change Request Memo Memo from Collection Development stating IL's ability to support courses	3 years; transfer to Archives
13-11	Departmental Administration Files Reports, correspondence, and materials documenting the activities and concerns of the office	3 years; destroy all materials not documenting a significant action or interaction; transfer remainder to Archives
13-12	Disciplinary Files	3 years; destroy provided no related reprimands, suspensions, or demotions. May be destroyed in less time if ordered by SERB, SPRB, or court. Official record maintained by HR or Provost.
13-13	Donor Files Correspondence between Dean's office and major UL donors.	3 years; transfer to Archives. Original gift agreements are held in individual depts. to which gifts are made. Record of gifts maintained by Development office.
13-14	Drafts Preliminary outlines of a plan, policy or report	Retain until superseded, or issuance of final report, policy, or plan, then destroy

Schedule Number	Record Series Title	Retention Period
13-15	Employee Handbooks Includes library faculty handbook, student employee handbook, safe employee handbook, training manuals	Retain until superseded; transfer one copy to Archives
13-16	Evaluation Forms Staff evaluation forms and statements used in developing performance evaluations of Deans, Associate Deans, and Unit Heads	3 years; destroy in a way that maintains confidentiality; retain performance evaluation summary in personnel file
13-17	Lists/Directories Includes mailing lists, directories and rosters compiled by the office	Retain until superseded, obsolete, or replaced, then destroy
13-18	Organizational Charts Organizational charts of the UL	Retain until superseded, transfer 1 copy to Archives
13-19	Personnel Files – Faculty May contain copies of contracts, reappointment reviews, hiring documentation, vitae, evaluation summaries, merit work sheets, etc.	5 years after employment ends, then destroy. Official file maintained by Provost
13-20	Personnel Files – Administrative & Classified May contain copies of contracts, hiring documentation, evaluation summaries, certifications, re-classifications, promotion, etc.	5 years after employment ends, then destroy. Official file maintained by Human Resources
13-21	Personnel Files – Position Descriptions	Retain until revised, superseded, or obsolete, then destroy
13-22	Personnel Files – Promotion and Tenure Approval or denial recommendations and pertinent correspondence and documentation	Retain decision documentation in personnel file, return submitted material to faculty member after 3 years
13-23	Promotional & Publicity Materials Includes brochures, news clippings, etc.	3 years; transfer to Archives
13-24	Research & Grant Proposals, Approved	5 years after project ends, transfer final report to Archives; destroy remainder
13-25	Research & Grant Proposals, Rejected	1 year; destroy
13-26	Scholarships & Awards Files Application documentation, correspondence, information about scholarship	Retain information on recipients permanently. Retain files created for award process 1 year after award is given, then destroy.

Schedule Number	Record Series Title	Retention Period
13-27	Search Committee Records Job posting, list of candidates, applications, references, evaluation forms, EEOC forms, etc.	3 years after date of appointment, then destroy in a way that maintains confidentiality. Application files for non-hires destroy after 1 year. Official file maintained by the Office of Equity & Diversity.
13-28	Time Sheets & Leave Requests	3 years, then destroy. Payroll is the office of record.
13-29	Transient Documents Includes telephone messages, post-it notes, and other similar documents that serve to convey information of temporary importance in lieu of oral communication. This includes all such documents in electronic formats and voice mail.	Retain until of no administrative use, then destroy.