

# BGSU Schedule of Records Retention

## Office: Center for Regional Development

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: 04/16/2009

Records Manager: Signed      Date: 04/14/2009

Records listed below can be in either paper or electronic format

Schedule Number	Record Series Title	Retention Period
120-1	<b>Administrative Files:</b> subject files, committee files, reports, etc.	Retain 3 years in office, destroy all documents not documenting significant actions or interactions; transfer remainder to the University Archives
120-2	<b>Conferences/Events Files:</b> planning files programs and promotional material	Retain 3 years in office, destroy all routine planning documents; transfer remainder to the University Archives
120-3	<b>Correspondence, Executive:</b> deals with significant aspects of the administration of office.	Retain 3 years in office; transfer to University Archives
120-4	<b>Correspondence, General:</b> includes internal letters and memos and correspondence from individuals, companies and organizations requesting information.	Retain 1 year, then destroy

Schedule Number	Record Series Title	Retention Period
120-5	<b>Correspondence, Routine:</b> referral letters and form letters, setting up appointments, etc.	Retain until of no administrative use, then destroy
120-5	<b>Financial Records:</b> invoices, monthly reports receipts, purchase orders, budgetary files, reimbursement forms, etc.	Retain 4 years, then destroy
120-6	<b>Grant Project Files:</b> proposals, correspondence financial records, reports	Retain 3 years after grant project completed, then destroy provided that appropriate reports are transferred to University Archives
120-7	<b>Promotional Material:</b> newsletters, brochures, flyers, multi-media products	Retain until of no administrative use, transfer one copy to University Archives
120-8	<b>Personnel Files</b>	Retain 1 year after resignation, retirement, or termination. Office of Human Resources or Provost maintains official records. Destroy in a manner than protects confidentiality.
120-9	<b>Search/Recruitment Committee Files:</b> includes applications, committee reports, hiring forms, correspondence, etc.	Retain 1 year after position filled, then destroy Official files maintained in Office of Human Resources or Provost and Office of Equity and Diversity.
120-10	<b>Studies/Publications</b>	Retain 5 years in office, transfer to University Archives
120-11	<b>Transient Documents:</b> phone messages and logs and other internal documents created for office management purposes	Retain until of no administrative use, then destroy