

# BGSU Schedule of Records Retention

## Office: Faculty Senate

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: Sheri Wells Jensen Date: 05/06/2014  
 Records Manager: Mike Intranuovo Date: 05/06/2014

Schedule Number	Record Series Title	Main Format(s)	Retention Period
61-01	<b>Accounting Records:</b> Including accounts payable, invoices, ledgers, vouchers, accounts receivable, annuity records, bad debt actions, balance sheets, cash books, cash disbursement journals, cash journals, receipts, register tapes, chart of accounts, cost accounting, expenditure reports, journal entries, journals, payroll change reports, checks, petty cash records, registers, requisitions, royalty payments, student accounting records, travel expenses, workers compensation.	Paper	4 years, then recycle.  Note: If complete account numbers are included, shred the record.*
61-02	<b>Annual Report:</b> Annual self-study of the department that encompasses at least some or all of the following: department activities, outreach events, personnel changes, logistical information, future goals, etc. Usually created by the director/chair/etc.	Paper / Electronic	3 years, then transfer one copy to University Archives. All other copies may be recycled/deleted.

Schedule Number	Record Series Title	Main Format(s)	Retention Period
61-03	<b>Budget:</b> Final, approved, annual budget for Faculty Senate.	Paper	Active + 1 year, then contact University Archives to appraise for historic value.
61-04	<b>Charter Files/Governance Documents:</b> Includes academic charters, proposed amendments, additions, revisions, minutes, correspondence, BOT by-laws, etc. Also includes charter interpretations.	Paper	3 years, then contact University Archives to appraise for historic value.
61-05	<p><b>Correspondence</b></p> <p><b>A. Routine/Transient:</b> Referral letters, requests for routine information or publications provided to the public by an agency that are answered by standard form letters</p> <p><b>B. General:</b> Includes internal letters and memos; also correspondence from various individuals, companies, and organizations requesting information pertaining to agency and legal interpretations and other miscellaneous inquiries. This correspondence is informative, (it does not attempt to influence policy).</p> <p><b>C. Executive:</b> Deals with significant aspects of the administration of the offices. Includes information on policy, program, fiscal or personnel matters.</p> <p>Note: Contact the University Records Manager for help with email management</p>	Email / Paper	<p><b>A.</b> Retain until no longer of administrative value, then recycle or delete from email client</p> <p><b>B.</b> 1 year, then recycle or delete from email client</p> <p><b>C.</b> Retain 3 years (if email retain in email client), then contact University Archives for historic appraisal</p>
61-06	<b>Election/Committee Membership Files:</b> Includes correspondence, memoranda, nomination ballots, returned ballots, tabulation information, timetables, faculty committee appointment lists, senators'/faculty members' interest sheets, etc.	Paper	4 years, then destroy in a manner that protects confidentiality*

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61-07	<b>Faculty Eligibility Report:</b> Annual faculty status containing statistical data for Faculty Senate eligibility.	Paper	4 years, then destroy in a manner that protects confidentiality*
61-08	<b>Grievance Files:</b> Concerning disputes over salary, retention, rank, tenure, promotion, professional practices, etc. Includes grievances as a result of alleged violations of applicable policies, procedures, rules, regulations, or laws relating to the operation of BGSU.	Paper	Active + 1 year, then destroy in a manner that protects confidentiality*  Note: Official grievance files are retained in the Provost Office Active + 6 years
61-09	<b>Meeting Minutes:</b> Official minutes, agendas, memoranda, etc. for Faculty Senate, Senate Executive Committee, ad hoc committees, task forces, etc. May also include correspondence, reports, recommendations, resolutions, charges, etc.	Paper / Electronic	3 years, then contact University Archives to appraise for historic value
61-10	<b>Records Destruction Reports (Certificate of Records Disposal):</b> Lists schedule number, record series, inclusive dates, and date of disposal. These reports must be filled out every time a confidential record series is disposed*.	Paper	10 years, then recycle  Note: Forward one copy to University Archives (CAC, Fifth Floor – Jerome Library)
61-11	<b>Rosters:</b> Membership lists of Faculty Senate and committee members.	Paper	4 years, then contact University Archives to appraise for historic value
61-12	<b>Subject Files (Executive):</b> Files of correspondence, reports, memoranda, etc., documenting activities of Faculty Senate. May include special reports, publications, panel discussions, etc.	Paper	3 years, contact University Archives to appraise for historical value

Schedule Number	Record Series Title	Main Format(s)	Retention Period
61-13	<b>Transient Documents:</b> Electronic or written records that have a very short-lived administrative, legal, or fiscal value. May include, but are not limited to: post-it notes, routing slips, telephone messages, e-mail or voicemail, copies, notes or drafts used in the production of public records, and surveillance videos.	Electronic/ Paper	Until no longer of value or superseded, then recycle or delete

\*For record series that are destroyed confidentially, a Certificate of Records Disposal (CRD) must be filled out prior to disposal. The specific college/department must retain the CRD on file for 10 years after the date of disposal, and a copy of the CRD must be sent to the University Archives. Confidential paper records must be disposed of through Certified Document Destruction, Inc., and must be scheduled through the University Records Manager (372-9614).

Note: University records include all information, regardless of format (paper, electronic, microform, etc.), created or received by a university office that documents the functions, policies, procedures, decisions, operations or other activities of the office. Retention periods apply to records regardless of format.