

# BGSU Schedule of Records Retention

## Office: Mathematics and Statistics

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: 03/29/2012  
Records Manager: Signed Date: 03/29/2012

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

Schedule Number	Record Series Title	Retention Period
047-01	<b>Academic Records - Graduate:</b> Records of academic work pursued by graduate students enrolled in department.	Retain 7 years after date of last activity, then destroy in a manner that ensures confidentiality. Destroy applications after 1 academic year, if not enrolled.
047-02	<b>Advising Records - Undergraduates:</b> Record of academic work pursued by students enrolled in department.	Retain until graduated or date of last activity, then destroy in a manner that ensures confidentiality.
047-03	<b>Committee Files:</b> May include agendas, minutes, correspondence and reports of department committees.	Retain 2 years, then destroy.
047-04	<b>Contracts, Graduate Assistants</b>	Active + 3 years, then destroy.

Schedule Number	Record Series Title	Retention Period
047-05	<b>Correspondence-Executive:</b> Correspondence pertaining to significant aspects of the administration of the department. Includes information on policy, program, fiscal, and/or personnel matters.	Retain 2 years, then destroy.
047-06	<b>Correspondence - General:</b> Letters and memos, both internal and external, from and to individuals, offices, agencies and companies requesting information. This correspondence is informative but does not attempt to influence policy.	Retain 2 years, then destroy
047-07	<b>Correspondence - Routine:</b> Referral letters, requests for routine information, setting appointments, etc.	Retain until of no administrative use, then destroy.
047-08	<b>Course Exams</b>	Retain one year, then destroy in a manner that ensures confidentiality.
047-09	<b>Course Syllabi</b>	Retain until of no administrative use, then appraise for transfer to Archives. Contact University Archivist.
047-10	<b>Endowment Fund Reports - Periodic:</b> Reports of funds collected or expended by endowment accounts.	Retain until of no administrative use, then destroy. Reports maintained in Office of Development.
047-11	<b>Financial Records:</b> Includes records of accounts, transfers, budgets, travel, invoices, receipts, requisitions, telephone purchasing card transactions.	Retain 18 months if scanned, then destroy. If not scanned, retain 4 years, then destroy.
047-12	<b>Grade Records:</b> Includes grade books and final grade rosters	Active + 1 year, then destroy in a manner that ensures confidentiality. Registration & Records is the office of record.
047-13	<b>Personnel Files - Faculty:</b> May include contracts and addenda, promotion/ tenure decisions, hiring documentation, resumes, correspondence, sabbatical documents, forms resignation and	Retain 5 years after person leaves employment. Maintain historical data and destroy other documents. Official file in Office of Provost.

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	retirement documents	
047-14	<b>Personnel Files - Staff:</b> May include position descriptions, salary rates, contracts, performance evaluations, forms, official correspondence, evidence of continuing education, step increases; vacation/sick leave forms, resignation or retirement documentation.	Purge every 3 years and destroy all 5 years after person leaves employment. Maintain historical data and destroy other documents. Official file in Office of Human Resources.
047-15	<b>Promotion and Tenure Files:</b> Approval or denial recommendations and pertinent correspondence and documentation	Retain decision documentation in personnel file. Return material submitted by faculty member to that person.
047-16	<b>Promotion and Tenure Files - Three Year Review</b>	Retain in office until promoted, then return to faculty member.
047-17	<b>Promotion and Tenure Committee Files</b>	Retain ballots for committee selection 2 years after date of election, then destroy. Retain reappointment ballots until tenure achieved. Once tenured, retain 2 years after balloting date, then destroy.
047-18	<b>Promotional Materials:</b> Department newsletters, recruitment materials, etc.	Retain until updated; transfer 1 copy to University Archives.
047-19	<b>Recruitment/Search Files-Faculty and Staff:</b> Includes applications, resumes and credentials position authorization and hiring forms, position descriptions, and search committee files	Retain 3 years after date of appointment, then destroy. Application files for non-hires destroy after 2 years.
047-20	<b>Scholarships:</b> Includes applications, correspondence, and general information.	Active + 3 years, then destroy. Information on recipients should be maintained permanently.
047-21	<b>Teaching Evaluations:</b> Student evaluations for course instructors used for reappointment, promotion, and tenure.  <b>A. Tenured (Professors) Faculty Teaching Evaluations</b>	Retain 5 years, then return to faculty member.

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	<p><b>B. Tenured (Associate Professors) Faculty Evaluations:</b> Evaluations of tenured faculty eligible for promotion to Professor.</p> <p><b>C. Probationary (Pre-tenured) Faculty Evaluations:</b> Evaluations of faculty working towards tenure and promotion.</p> <p><b>D. Non-tenured track Faculty Evaluations:</b> Includes full-time and part-time faculty</p> <p><b>E. Graduate Student Teaching Evaluations</b></p> <p><b>F. Teaching Evaluations for Faculty no longer employed by the Department</b></p>	<p>Retain 5 years, or until promoted, then return to faculty member.</p> <p>Retain 5 years, or until promoted to Associate Professor, then return to faculty member.</p> <p>Retain 5 years, then return to faculty member</p> <p>Active + 3 years, then destroy.</p> <p>Retain 5 years, then destroy.</p>
047-22	Unit Level Strategic Plan/Program Review Files	Retain 5 years after plan cycle completed, then destroy.