

BGSU Schedule of Records Retention

Office: School of Art

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: 11/03/2014

Records Manager: Signed

Date: 11/06/2014

Schedule Number	Record Series Title	Main Format(s)	Retention Period
147-01	Accounting Records: 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/Electronic	4 years, then recycle/delete <i>Note: The School of Art maintains copies of accounting/financial records. These can be disposed prior to 4 years, but should not be kept longer than 4 years.</i>
147-02	Accreditation Reports: Reports documenting accreditation review by accrediting agencies. <i>Includes NASAD accreditation report.</i>	Paper/Electronic	4 years, then contact University Archives for historic appraisal

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147-03	Advertising / Promotional Materials: Materials made in house to promote the department / college / university; i.e. exhibition catalogs, brochures, newsletters, pamphlets, etc.	Paper	3 years, then contact University Archives for historic appraisal
147-04	Annual Report / Program Reviews / Self-Studies: Annual self-study of the department or a program that encompasses at least some or all of the following: activities, outreach events, personnel changes, logistical information, future goals, etc. Also any special reports / publications of the dept, including HEADS reports.	Paper/Electronic	3 years, then contact University Archives for historic appraisal
147-05	Correspondence A. Routine/Transient: Referral letters, requests for routine information or publications provided to the public by an agency that are answered by standard form letters B. General: 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). C. Executive: Deals with significant aspects of the administration of the offices. Includes information on policy, program, fiscal or personnel matters.	Paper/Email <i>Note: Contact the University Records Manager for help with email management.</i>	A. Retain until no longer of administrative value, then recycle or delete from email client B. 1 year, then recycle or delete from email client C. Retain 3 years (if email retain in email client), then delete or export from email client and retain until no longer of value
147-06	Inventories: Inventory of art holdings. Includes information such as accession, provenance, artist, media, title, monetary value, etc.	Electronic	Run a report at the end of the academic year of the full inventory and send

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			to University Archives
147-07	Meeting Minutes: Minutes and governance files of official committees	Paper/Electronic	3 years, then contact University Archives to appraise for historic value
147-08*	Personnel Files: Unofficial copies, for departmental use only, of employment records for classified and administrative staff, both part-time and full-time. Files may contain applications, position descriptions, letters of commendation / reprimand, performance evaluations, leave forms, PERS forms, resignations, termination notices, and other related items.	Paper	Retain 1 year after employee separates from School of Art, then shred* Note: Human Resources maintains the official copy permanently.
147-09*	Search Committee / Recruitment Files: Records of individuals who applied or interviewed for positions for which a committee was formed. Files contain position authorization forms, job descriptions, search committee minutes, applicants' credentials including non-hires, search chronologies, authorization to hire forms, correspondence with applicants & notes from all interviewers.	Paper	3 years after search ends, then shred*
147-10*	Student Applications: For admission / readmission to study abroad program, or any academic program	Paper	Retain for 1 year, then shred*
147-11*	Student Evaluations: Student evaluations of a teacher/faculty member. Used for promotion and tenure.	Paper	Retain 5 years after faculty member has separated from the School of Art, then shred*
147-12*	Student Files: Student academic files (undergraduate and graduate) containing information on academic work pursued. This includes, but is not limited to: grades, course evaluations, competency assessments, and any other	Paper	Retain for 1 year after student separates, shred* <i>Note: Registration and Records retains the official copy of</i>

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	coursework that can be applied to a degree.		<i>these records permanently.</i>
147-13	Syllabi	Paper/Electronic	Active + 6 years, then recycle/delete
147-14	Transient Documents: 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.	Paper/Electronic	Until no longer of value or superseded, then recycle or delete

*For these record series, 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.

Comments

1. In accordance with its collection policy, the University Archives can only accept the following records: 147-02, 147-03, 147-04, 147-06, and 147-07.
2. Storage for non-permanent, inactive paper records is available. Contact the University Records Manager for more details.