

# BGSU Schedule of Records Retention

## Office: Sponsored Programs and Research

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: 08/26/2008

Records Manager: Signed

Date: 08/27/2008

Schedule Number	Record Series Title	Retention Period
25-1	<b>Annual Report</b>	Retain until of no administrative use, transfer 1 copy to Archives
25-2	<b>Award Files</b> Files created for the following awards: Olscamp Research Award, Outstanding Young Scholar Award, President's Award for Collaborative Research and Creative Works	Retain 1 year after date of award, then transfer to Archives
25-3	<b>Correspondence, Executive</b> Pertains to significant aspects of the office's administration. Includes information on policy, programs, fiscal or personnel matters. Maintained in paper and/or electronic format	Retain 2 years, then transfer to Archives
25-4	<b>Correspondence, General</b>	Retain 1 year, then dispose

Schedule Number	Record Series Title	Retention Period
	Includes internal letters and memos and correspondence from various individuals, companies and organizations requesting information pertaining to office. This correspondence is informative, but not involved in establishing or changing policies or programs. Maintained in paper and/or electronic format	
<b>25-5</b>	<b>Correspondence, Routine</b> Referral letters, requests for routine information or publications, setting appointments, etc. Most inquiries handled by standard form letters. Maintained in paper and/or electronic format	Retain until of no administrative use, then dispose
<b>25-6</b>	<b>Faculty Research Committee Files</b> Grant proposals and applications, procedural correspondence, minutes, reports and statistical data	Retain funded grant files 3 years after final grant year has ended and non-funded grant files 3 years after date of application, then dispose. Transfer minutes and reports to Archives
<b>25-7</b>	<b>Financial Records</b> Includes monthly reports, invoices, receipts, purchase orders, budgetary files, reimbursement, forms, etc.	Retain 4 years, then dispose
<b>25-8</b>	<b>Grant Files</b> Includes grant project proposal documentation, award notification, letters of denial, obligation agreements/forms, and correspondence	Retain funded grant files 3 years after grant has ended, then dispose. Retain non-funded grant files 2 years from date of application, then dispose
<b>25-9</b>	<b>OBOR Research Incentive Grants</b>	Retain grant files 3 years, then dispose. Transfer plans

Schedule Number	Record Series Title	Retention Period
	Files containing application documents, correspondence, contracts, award notifications, etc.	and reports and allocation of funds to Archives
<b>25-10</b>	<b>Special Grant Programs</b> Includes files documenting special grant programs such as Alumni Undergraduate Research award, Minority High School Student Research award, Biomedical Research award, etc.	Programs no longer administered by office. For files still retained in office, keep 3 years after grant completed, then dispose
<b>25-11</b>	<b>Transient Documents</b> Includes telephone messages, post-it-notes, and other documents that serve to convey information of temporary or limited importance	Retain until of no administrative use, then dispose