

# BGSU Schedule of Records Retention Office: Library Teaching & Learning— University Libraries

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: 05/24/2012

Records Manager: Signed

Date: 07/13/2012

PLEASE NOTE THAT THIS SCHEDULE APPLIES TO RECORDS IN BOTH PAPER AND/OR ELECTRONIC FORMAT

Schedule Number	Record Series Title	Retention Period
134-1	<b>Accounting Records (copies)</b> Includes purchase orders, travel expense authorizations, Inter-departmental charges, receipts, supply requests, etc.	4 years, then destroy
134-2	<b>Annual Reports/Business Plans</b> For Library Teaching & Learning department activities	3 years, then transfer to University Archives
134-3	<b>Appointment Books &amp; Calendars</b>	1 year, then destroy
134-4	<b>Budget &amp; Financial Files</b> Includes financial accounting statements, budget preparation documents, foundation reports, income reports. Includes student budget requests.	4 years, then destroy
134-5	<b>Class Guides/Library Guides</b> Created by LTL staff for course webpages or for topics related to library's subject matter	Retain until superseded, then appraise for historic value; transfer to Archives or destroy.

Schedule Number	Record Series Title	Retention Period
134-6	<b>Correspondence, Executive</b> Deals with significant aspects of the administration of the office, policy, program, fiscal, personnel matters, procedures, or workflows.	2 years, then transfer to University Archives
134-7	<b>Correspondence, General</b> Includes internal letters and memos; correspondence from various individuals, companies, and organizations requesting information pertaining to agency and legal interpretations, reference inquiries, and other miscellaneous inquiries. This correspondence is informative (it does not attempt to influence policy).	Retain 1 year, then destroy in a manner protecting confidentiality
134-8	<b>Correspondence, Routine</b> Referral letters, requests for routine information or publications, setting appointments, etc. Most inquiries answered by standard form letters.	Destroy after no longer of administrative value
134-9	<b>Departmental Administration Files</b> Correspondence, reports, and materials documenting the activities and concerns of the department. Includes files concerning departmental policies and procedures. Also includes material regarding LTL's role in BGSU Orientation activities.	3 years, then destroy all materials not documenting a significant action or interaction; transfer remaining to University Archives
134-10	<b>Departmental Committee Files</b> Agendas, minutes, correspondence, reports for University Libraries committees. Includes UL Faculty Committee records.	3 years, then destroy; send to University Archives only if staff served as Committee Chair
134-11	<b>Drafts</b> Preliminary outlines of a plan or document.	Retain until superseded, or issuance of final report or policy.
134-12	<b>Employee Handbooks</b> Includes reference coordinator handbook and UL Faculty Handbooks.	Retain until superseded; appraise for transfer to Archives.
134-13	<b>Grant &amp; Research Proposals, Approved</b> For projects managed by LTL	5 years after grant ends, transfer to University Archives
134-14	<b>Grant &amp; Research Proposals, Rejected</b> For LTL projects	1 year, then destroy

Schedule Number	Record Series Title	Retention Period
134-15	<b>Monthly Reports/Statistics</b> Includes faculty monthly reports.	Retain until annual report is compiled, then destroy
134-16	<b>News Clippings &amp; Publicity Materials</b> Concerning the activities of LTL.	3 years; transfer to University Archives
134-17	<b>Personnel Records (copies) - Staff</b> Vacation requests, leave forms, time sheets, personnel action forms, annual reviews. Applies to administrative, classified, faculty, and non-student letter of appointment.	Purge every 3 years and destroy all 3 years after last activity. Human Resources and Provost maintain official records.
134-18	<b>Personnel Records (copies) – Students</b> Hire/rehire forms (copies), Kronos summary reports, Termination forms (copies), annual evaluations.	3 years after date of last activity, then destroy. Student Employment maintains official record.
134-19	<b>Staff and Faculty Search Committee Records</b> May include job posting, list of candidates, final report	Destroy after search is complete. Office of Equity & Diversity maintains official record.
134-20	<b>Student Employee Search Records</b> May include job posting, resumes, application forms.	One year after position is filled, then destroy.
134-21	<b>Time Sheets &amp; Leave Requests</b>	3 years, then destroy. Payroll is the office of record.
134-22	<b>Transient Records</b> Have very short-lived administrative, legal or fiscal use. May include telephone messages, inner-office blog posts, etc.	Destroy once no longer of use; dispose of as soon as allowable