

BGSU Schedule of Records Retention

Office: Women’s Center

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: 1/28/2010

Records Manager: Signed

Date: 1/28/2010

Schedule Number	Records Series Title	Retention Period
129-1	Accounting Records	4 years, then destroy
129-2	Annual Reports/Business Plans	3 years, transfer to Archives
129-3	Appointment Books/Classroom Calendars	1 year, then destroy
129-4	Correspondence, Executive Deals with significant aspects of the administration of the Center. Includes information on policy, program, fiscal, or personnel matters. Maintained in paper or electronic format.	Retain 2 years, then appraise; transfer to University Archives
129-5	Correspondence, 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). Maintained in paper or electronic format.	Retain 1 year, then destroy

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129-6	Correspondence, Routine Referral letters, form letters, requests for routine information or publications, setting appointments, etc. Most inquiries answered by standard form letters. Maintained in paper or electronic format.	Destroy after no longer of administrative value.
129-7	Conference Files May include programs, planning files, evaluations, and correspondence.	Retain 3 years, then transfer to Archives
129-8	Departmental Administration Files Correspondence, reports, and materials documenting the activities and concerns of the Center	3 years; destroy all materials not documenting a significant action or interaction; transfer remainder to Archives
129-9	Departmental Committee Files Agendas, minutes, correspondence, reports	3 years; transfer to Archives
129-10	Director's General Subject File Correspondence and reports with other BGSU units and external agencies	3 years; review reports/circulars from other units or external agencies for destruction, transfer rest to Archives
129-11	Financial Accounting Statement Issued monthly by the Business Office who has original Record; provides record of expenses, income, and balances for each account	3 years, then destroy
129-12	General Files Correspondence, reports, and publications of other BGSU departments and external agencies	1 year, then destroy
129-13	Graduate Associate Appointment	5 years, then destroy in a manner protecting confidentiality
129-14	Interdepartmental Billing	4 years, then destroy
129-15	Invoices	4 years, then destroy
129-16	News Clippings Concerning the activities of the Center	3 years; transfer to Archives
129-17	Personnel Records, Staff and Students	Upon termination, destroy in a manner protecting confidentiality; Human Resources and Student

Schedule Number	Records Series Title	Retention Period
		Employment maintain official records.
129-18	Program Evaluations Submitted by students and individual participants in courses and programs.	Retain until superseded by summary evaluation
129-19	Program Proposals	1 year, transfer to Archives
129-20	Purchase Orders	4 years, then destroy
129-21	Requisitions	4 years, then destroy
129-22	Research Proposals, Approved	5 years after project ends; transfer to Archives
129-23	Research Proposals, Rejected	1 year, then review for historical value; destroy or transfer to Archives
129-24	Staff Search Committee Records Job posting, list of candidates, final report	3 years, then destroy in manner protecting confidentiality
129-25	Time Cards and Sheets	5 years, then destroy in manner protecting confidentiality
129-26	Travel Reimbursement For University-related travel	4 years, then destroy in manner protecting confidentiality