

California State University
RECORDS/INFORMATION RETENTION AND DISPOSITION SCHEDULE

Record Series Identifier	Record Series Name								
11.0 INSTITUTIONAL RECORDS									
Record Identifier	Record Title	Custodian of Records	Record Value: O - Operational F - Fiscal L - Legal H - Historical V - Vital					Retention Source Authority	Retention Period
			O	F	L	H	V		
11.1	Student Demographics Examples include: Statistics on Degrees, Enrollment, Grades, Race/Ethnicity...		X				X		IPEDS Permanent
11.2	Campus Policies and Presidential Executive Orders		X				X		Best Practice Retain as long as the policy is in effect, then transfer to campus archives or the appropriate records management authority.
11.3	Administrative Program Review (Pertains to records associated with campus periodic reviews of administrative units.)						X		Best Practice 1 Cycle (x years)
11.4	Campus Presidential Records Examples include: Delegations of Authority, calendars, schedules, videos, office subject files...		X				X		Best Practice Retain until no longer of administrative value; then transfer records of historical value, as determined by the record custodian, to campus archives or the appropriate records management authority.

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11.5	Executive Business Calendars		X					Best Practice	3 years or less
11.6	CA Public Records Act Requests				X			Best Practice	Three years after receipt of the request.
11.7	Committees - Agendas & Minutes								
11.7.1	University Presidential Advisory Committees (Non-policy setting)		X			X		Best Practice	Retain 3 years or less and then transfer to campus archives or the appropriate records management authority to determine if the record(s) have historical value and will be archived.
11.7.2	University Standing Committees (Policy Setting) (A standing committee is a sub-unit of the university that facilitates consideration of the business and governance of the organization.)		X			X		Best Practice	Retain for 3 years and then transfer to campus archives or the appropriate records management authority to determine if the record(s) have historical value and will be archived.
11.7.3	University Standing Advisory Committees (Non-Policy Setting) (A standing committee is a sub-unit of the university that facilitates consideration of the business and governance of the organization.)		X			X		Best Practice	Retain 3 years or less and then transfer to campus archives or the appropriate records management authority to determine if the record(s) have historical value and will be archived.

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11.7.4	University Adhoc Committees (Non-policy setting)		X			X		Best Practice	Retain until no longer of administrative value and then transfer to campus archives or the appropriate records management authority to determine if the record(s) have historical value and will be archived.
11.8	Academic Senate Agendas & Minutes		X			X		Best Practice	Retain until no longer of administrative value and then transfer to campus archives or the appropriate records management authority to determine if the record(s) have historical value and will be archived.
11.9	Internal Reports related to Policy Setting		X			X		Best Practice	Retain until no longer of administrative value and then transfer to campus archives or the appropriate records management authority to determine if the record(s) have historical value and will be archived.
11.10	Campus Litigation Files					X		Best Practice	Retain for 5 years after the ligation has been concluded.

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11.11	Original litigation settlement agreements				X				Best Practice	Retain for 10 years after complying with all the terms of the settlement agreement unless the litigation pertains to a CSU employee, then refer to the Personnel/Payroll schedule (sections 1.2 and 1.3)
11.12	Subpoenas not related to ligation involving CSU policy		X						Best Practice	1 year
11.13	Correspondence									
11.13.1	Ephemeral / Transient communications received or sent which do not contain significant information about an institution's programs, fiscal status or campus operations. Records include, but are not limited to, advertising circulars, desk notes, memoranda, and other records of an informational nature.		X						Best Practice	Until read
11.13.2	General - Correspondence received or sent which do not contain significant information about an institution's programs . Records include, but are not limited to, letters sent and received; memoranda; notes; transmittals; acknowledgments; community affair notices; routine requests for information or publications; enclosures and attachments.		X						Best Practice	Retain until no longer of administrative value, but no longer than 2 years.

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11.13.3	Administrative - Correspondence received or sent which contain significant information about an institution's programs . Records include, but are not limited to, letters sent and received, policy memoranda, notes, enclosures, and attachments.		X			X		Best Practice	Retain until no longer of administrative value, and then transfer to campus archives or the appropriate records management authority to determine if the record(s) have historical value and will be archived.
11.13.4	Executive - Correspondence regarding significant events and the development of administrative structure, policies, and procedures of this office. It may also record the historical development of the office. Records may include: letters sent and received; notes; directives; acknowledgments; and memoranda.		X			X		Best Practice	Retain until no longer of administrative value; then transfer records of historical value, as determined by the record custodian, to campus archives or the appropriate records management authority.
11.14	Honorary Degree Records	CO				X		Best Practice	Permanent
11.15	University Communications Records Examples include: bulletins, publications, annual reports, university newsletters, commencement event records		X			X		Best Practice	Retain until no longer of administrative value and then transfer to campus archives or the appropriate records management authority to determine if the record(s) have historical value and will be archived.

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11.16	Media/Public Relations Records Examples include: press releases, student newspapers, public relations materials, commencement publicity...		X			X	Best Practice	Retain until no longer of administrative value and then transfer to campus archives or the appropriate records management authority to determine if the record(s) have historical value and will be archived.
11.17	Trade Marks & Logos				X	X	Best Practice	Permanent
11.18	Art Inventory Records		X	X		X	Best Practice	Permanent
11.19	Campus Managed Child Development Office Files		X				Manual of Policies and Procedures COMMUNITY CARE LICENSING DIVISION CHILD CARE CENTER Division 12 Chapter 1 STATE OF CALIFORNIA HEALTH AND HUMAN SERVICES AGENCY DEPARTMENT OF SOCIAL SERVICES Section 101221 - Child's Records Section 101217 - Personnel Records	3 years

Notes: