## California State University

### RECORDS/INFORMATION RETENTION AND DISPOSITION SCHEDULE

<table>
<thead>
<tr>
<th>Record Series</th>
<th>Record Series Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.0</td>
<td>INSTITUTIONAL RECORDS</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Record Identifier</th>
<th>Record Title</th>
<th>Custodian of Records</th>
<th>Record Value: O - Operational, F - Fiscal, L - Legal, H - Historical, V - Vital</th>
<th>Retention Source Authority</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.1</td>
<td>Student Demographics</td>
<td>X X</td>
<td>IPEDS</td>
<td>Permanent</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Examples include: Statistics on Degrees, Enrollment, Grades, Race/Ethnicity…</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.2</td>
<td>Campus Policies and Presidential Executive Orders</td>
<td>X X</td>
<td>Best Practice</td>
<td>Retain as long as the policy is in effect, then transfer to campus archives or the appropriate records management authority.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(Pertains to records associated with campus periodic reviews of administrative units.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.3</td>
<td>Administrative Program Review</td>
<td>X</td>
<td>Best Practice</td>
<td>1 Cycle (x years)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(Pertains to records associated with campus periodic reviews of administrative units.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.4</td>
<td>Campus Presidential Records</td>
<td>X X</td>
<td>Best Practice</td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Examples include: Delegations of Authority, calendars, schedules, videos, office subject files…</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### California State University
#### RECORDS/INFORMATION RETENTION AND DISPOSITION SCHEDULE

<table>
<thead>
<tr>
<th>11.5</th>
<th>Executive Business Calendars</th>
<th>X</th>
<th>Best Practice</th>
<th>3 years or less</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.6</td>
<td>CA Public Records Act Requests</td>
<td>X</td>
<td>Best Practice</td>
<td>Three years after receipt of the request.</td>
</tr>
<tr>
<td>11.7</td>
<td><strong>Committees - Agendas &amp; Minutes</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11.7.1</td>
<td>University Presidential Advisory Committees <em>(Non-policy setting)</em></td>
<td>X</td>
<td>X</td>
<td>Best Practice</td>
</tr>
<tr>
<td>11.7.2</td>
<td>University Standing Committees <em>(Policy Setting)</em> <em>(A standing committee is a sub-unit of the university that facilitates consideration of the business and governance of the organization.)</em></td>
<td>X</td>
<td>X</td>
<td>Best Practice</td>
</tr>
<tr>
<td>11.7.3</td>
<td>University Standing Advisory Committees <em>(Non-Policy Setting)</em> <em>(A standing committee is a sub-unit of the university that facilitates consideration of the business and governance of the organization.)</em></td>
<td>X</td>
<td>X</td>
<td>Best Practice</td>
</tr>
<tr>
<td>11.7.4</td>
<td>University Adhoc Committees (Non-policy setting)</td>
<td>X</td>
<td>X</td>
<td>Best Practice</td>
</tr>
<tr>
<td>11.8</td>
<td>Academic Senate Agendas &amp; Minutes</td>
<td>X</td>
<td>X</td>
<td>Best Practice</td>
</tr>
<tr>
<td>11.9</td>
<td>Internal Reports related to Policy Setting</td>
<td>X</td>
<td>X</td>
<td>Best Practice</td>
</tr>
<tr>
<td>11.10</td>
<td>Campus Litigation Files</td>
<td></td>
<td>X</td>
<td>Best Practice</td>
</tr>
</tbody>
</table>
## California State University
### RECORDS/INFORMATION RETENTION AND DISPOSITION SCHEDULE

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.11</td>
<td><strong>Original litigation settlement agreements</strong></td>
<td>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)</td>
</tr>
<tr>
<td>11.12</td>
<td><strong>Subpoenas not related to litigation involving CSU policy</strong></td>
<td>1 year</td>
</tr>
<tr>
<td>11.13</td>
<td><strong>Correspondence</strong></td>
<td></td>
</tr>
<tr>
<td>11.13.1</td>
<td><strong>Ephemeral / Transient communications</strong></td>
<td>Until read</td>
</tr>
<tr>
<td>11.13.2</td>
<td><strong>General - Correspondence 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.</strong></td>
<td>Retain until no longer of administrative value, but no longer than 2 years.</td>
</tr>
<tr>
<td>Section</td>
<td>Description</td>
<td>Retention Details</td>
</tr>
<tr>
<td>---------</td>
<td>-------------</td>
<td>------------------</td>
</tr>
<tr>
<td>11.13.3</td>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td>11.13.4</td>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td>11.14</td>
<td>Honorary Degree Records</td>
<td>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.</td>
</tr>
<tr>
<td>11.15</td>
<td>University Communications Records Examples include: bulletins, publications, annual reports, university newsletters, commencement event records</td>
<td>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.</td>
</tr>
</tbody>
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<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Retention</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.16</td>
<td>Media/Public Relations Records</td>
<td>X X</td>
<td>Best Practice</td>
</tr>
<tr>
<td>11.17</td>
<td>Trade Marks &amp; Logos</td>
<td>X X</td>
<td>Best Practice</td>
</tr>
<tr>
<td>11.18</td>
<td>Art Inventory Records</td>
<td>X X X</td>
<td>Best Practice</td>
</tr>
<tr>
<td>11.19</td>
<td>Campus Managed Child Development Office Files</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**