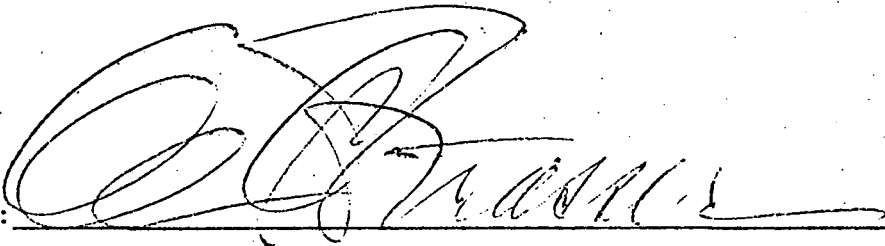


MONTGOMERY COMMUNITY COLLEGE

COMPREHENSIVE RECORDS SCHEDULE

No. C-459

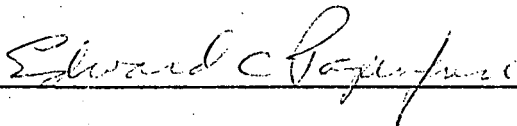
APPROVED: _____



President
Montgomery Community College

3/9/77
Date

APPROVED: _____



Archivist and Records Administrator
Maryland Hall of Records
Department of General Services

3/13/77
Date

APPROVED: _____

Secretary
Board of Public Works
State of Maryland

Date

The above signatures constitute legal approval of the record retention schedules contained in this manual.

COMPREHENSIVE RECORDS SCHEDULE

INTRODUCTION

The purpose of the Comprehensive Records Schedule is to bring under effective administrative control the current and non-current records maintained within the administrative offices of Montgomery College. The major objectives of the Schedule are to insure the proper retention of records of legal, administrative, and historical value and to provide for the systematic disposal of all other records as soon as they have fulfilled their usefulness.

The Schedule is divided into individual office schedules in a manner consistent with the general format used in the College Operating Budget. Each office schedule identifies and briefly describes all major record series located within the office and establishes a timetable governing the disposition of the records in office areas and, where applicable, in the College Archives. The term "retention" beneath the series description denotes the total minimum life span for the series. The "office" and "archives" categories indicate the minimum period of time that the series is to be retained in these areas. Further recommendations designed to facilitate the collection of important records are also indicated. "Offices of record," for example, are responsible for maintaining complete and accurate files of important, widely-dispersed documents until such time as they are deposited in the Archives.

The College Archivist, under the supervision of the Executive Assistant to the President, is responsible for insuring that the provisions of the Schedule are properly observed and implemented. He will also review the Schedule periodically in order to incorporate new record series under its provisions and to insure that retention and disposal rates meet the needs of the College. The transfer of records from office areas to the Archives will normally be initiated by the Archivist. Offices depositing records in the Archives in accordance with the provisions of the Schedule will receive a signed receipt for such deposits. The Archivist will not destroy office records covered by this Schedule without the concurrence of the appropriate administrator. Additional procedures governing records collection, access to archival records, and research activities in the College Archives are included in the College Policies and Procedures manual.

COMPREHENSIVE RECORDS SCHEDULE

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COLLEGE ARCHIVES - PROCEDURES*

7.75 COLLEGE ARCHIVES (Approved by the President, February 1, 1977)

7.751 GENERAL

The primary goals of the archival program are to develop and implement systematic procedures for the proper retention, retirement, and retrieval of records currently being created, to assure the economical retention of records of long-term administrative and historical value, and to effect the disposal of all other records as soon as they have fulfilled their usefulness. The program further seeks to:

- (1) conserve scarce space by preventing the uncontrolled accumulation of inactive records and selectively microfilming vital college records, and
- (2) provide a central reference source for valuable administrative and historical information contained in non-current records.

7.752 PROCEDURES

a. Records Collection

- (1) Materials to be deposited in the College Archives are normally determined by the provisions of the Comprehensive Records Schedule for Montgomery Community College.
- (2) Records not covered by the Comprehensive Records Schedule may be added to the archival collections at the discretion of the College Archivist. Records in this category might include but not be limited to: personal papers and memorabilia of current or former faculty, staff, or students; public documents relating to the development of educational policy within the State of Maryland and Montgomery County; other selected records of unique historical value to the College as determined by the College Archivist.

b. Access to Records Located in the College Archives

- (1) Access to records deposited in the archives by college administrative offices and academic departments shall normally be restricted to the originating office or to other persons designated by the originating office or by the President, except that such restrictions or designations shall not conflict with law or ordinances of the various levels of government, established policies of the Board of Trustees, or approved college procedures governing access to confidential records.
- (2) Individuals depositing in the archives personal papers related to college matters may specify reasonable restrictions on access to such papers. However, all such restrictions must be in writing and agreed to by

*Source: Montgomery College Policies and Procedures Manual.

the individual and the College Archivist. If they cannot agree, the Executive Assistant to the President will be consulted.

- (3) Many of the records located in the College Archives are normally available to members of the college community and to the public without restriction. Such records would include but are not limited to: official minutes and reference files of the Board of Trustees; minutes and related records of various college organizations, such as the Faculty, Staff, and Student Senates; college and non-college publications; photographs; scrapbooks; clipping files; and miscellaneous historical memorabilia.

c. Research Activities in the College Archives

- (1) The College Archives is intended primarily for the use of college staff and students. Research in the archives by others is welcomed, however, for any purpose which can be serviced properly by the archives staff.
- (2) Records in the archives may be withdrawn at any time by the originating office or by the President. Otherwise, records are normally available for use only in the archives office.
- (3) The staff of the College Archives is available at all times to assist individuals in locating documents pertaining to specific subjects and using the records preserved in the archives. The College Archivist will conduct extensive research activities at the request of researchers and college personnel only insofar as the limited resources of the office permit.

CENTRAL ADMINISTRATION

| CAMPUS: CENTRAL ADMINISTRATION | OFFICE: BOARD OF TRUSTEES |
|--------------------------------|---|
| Item No. | Description and Retention |
| | <p><u>BOARD OF TRUSTEES OFFICIAL RECORDS, 1969 -</u> Official files of the Montgomery College Board of Trustees, including approved minutes of Board meetings and packets (reference file) containing agendas and background material for Board consideration during regular monthly, special, and budget review sessions.</p> <p>RETENTION: Permanent Office: (a) Retain Board minutes five years; office of record (b) Retain Board packets three years; office of record Archives: Permanent</p> |
| 2. | <p><u>BOARD OF TRUSTEES TOPICAL FILE, 1969 -</u> Confidential memoranda, with attachments, that the President forwards to the Board, and correspondence, memoranda, and miscellaneous subject files relating to follow-up action taken to conform to Board actions and directives.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| | |

RECORDS RETENTION SCHEDULE NUMBER 2

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: PRESIDENT

Description and Retention

1. GENERAL CORRESPONDENCE AND OFFICE FILES, 1969 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the President.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

2. MIDDLE STATES ASSOCIATION FILE, 1950 -

Accreditation materials, including reports of accreditation teams, notifications, correspondence, and background material.

RETENTION: Permanent

Office: Retain materials relating to last accreditation

Archives: Permanent

3. CONTRACTS FILE, 1966 -

All contracts (except employee contracts, student activities contracts, and grant agreements) entered into by the College, as well as related correspondence, memoranda, and miscellaneous papers. The Executive Assistant to the President maintains all original contracts unless specified otherwise in the College policies and procedures manual.

RETENTION: Retain for six years after entire basic contract has been superseded.

Office: For total retention period and destroy

4. ADMINISTRATORS' LEAVE REPORTS/CA, c. 1967 -

Original leave reports signed by central office administrators when leave taken. These records support the bi-weekly report forwarded to the Payroll office.

RETENTION: Permanent

Office: Two years

Archives: Permanent

RECORDS RETENTION SCHEDULE NUMBER 2

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: PRESIDENT

Description and Retention

ASSOCIATION FILE, 1966 -

Constitutions, bylaws, rules, and regulations of associations of which the College is a member. This is a non-record file maintained for convenience by the Executive Assistant to the President.

RETENTION: Retain as long as the College remains a member and for one year thereafter.

Office: For total retention period and destroy

6. ANNUAL REPORTS /CA, c.1967 -

Annual reports of central administration offices.

RETENTION: Permanent

Office: Two years

Archives: Permanent

7. PRESIDENT'S ADVISORY COUNCILS, 1966 -

Minutes of the proceedings of the Councils and related records. Maintained by the Executive Assistant to the President.

RETENTION: Permanent

Office: Two years; office of record

Archives: Permanent

8. COMMITTEE ON COLLEGE INVESTMENTS AND BANK SELECTION, 1972 -

Minutes of the proceedings of the committee and related records. Maintained by the Executive Assistant to the President.

RETENTION: Permanent

Office: Two years; office of record

Archives: Permanent

9. ADMINISTRATORS' ASSOCIATION, 1969 -

Minutes and related records of the Administrators' Advisory Council and other formal college organizations of administrators.

RETENTION: Permanent

Office: Two years; office of record

Archives: Permanent

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: DEAN OF THE FACULTY

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1969 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Dean of the Faculty.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

FACULTY SENATE RECORDS, 1967 -

Minutes and related records of the proceedings of the Faculty Senate, general faculty meetings, and standing and special committees of the Senate, including the Academic Occasions committee, the Calendar committee, the committee on the Professional status of the Faculty, and the subcommittee on Contracts, Rank, and Tenure.

RETENTION: Permanent

Office: Three years; office of record

Archives: Permanent

FACULTY EVALUATIONS FILE, 1971 -

Evaluation forms and letters from department chairmen and other faculty members used by the subcommittee on Contracts, Rank, and Tenure in the annual evaluation process.

RETENTION: Three years

Office: Three years and destroy, except that materials of possible value during an evaluation for tenure shall be retained until such value ends.

FACULTY APPLICATIONS, 1968 -

Applications for faculty positions at the College.

RETENTION: Two years

Office: Two years and destroy

RECORDS RETENTION SCHEDULE NUMBER 4

| CAMPUS: CENTRAL ADMINISTRATION | OFFICE: INSTITUTIONAL RESEARCH & ANALYSIS |
|--------------------------------|--|
| Description and Retention | |
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1970 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Dean of Institutional Research and Analysis.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>HIGHER EDUCATION GENERAL INFORMATION SURVEY REPORTS, 1965 -</u> Statistical reports required by the Federal government relating to enrollment, finances, personnel, library, and other College operations. Different parts of the report are prepared throughout the year.</p> <p>RETENTION: Permanent Office: Ten years; microfilm periodically Archives: Permanent</p> |
| 3. | <p><u>ANNUAL STATISTICAL REPORT (FORMERLY REGISTRAR'S REPORT), 1948 -</u> Annual compilation of statistical data relating to enrollment, programs, courses, students, faculty, grades, and other College operations.</p> <p>RETENTION: Permanent Office: Ten years; microfilm periodically Archives: Permanent</p> |
| 4. | <p><u>STATE-MANDATED REPORTS, c. 1970 -</u> Enrollment and state aid reports for which the office of Institutional Research and Analysis is responsible. These reports are required by the Maryland State Department of Education, the Maryland State Board for Community Colleges, and the Maryland State Board for Higher Education.</p> <p>RETENTION: Permanent Office: Ten years; microfilm periodically Archives: Permanent</p> |
| | |

RECORDS RETENTION SCHEDULE NUMBER 5

DEPT: CENTRAL ADMINISTRATION

OFFICE: COLLEGE ARCHIVES

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1972 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the College Archivist.

RETENTION: Three years

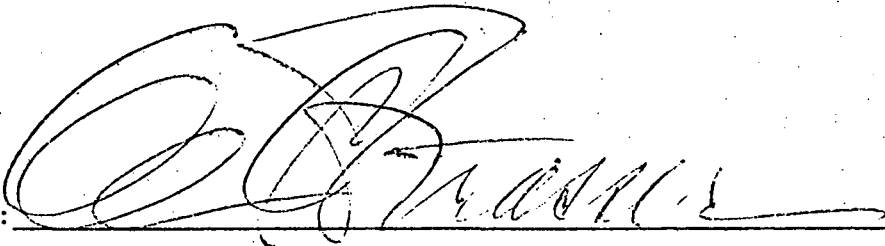
Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends.

MONTGOMERY COMMUNITY COLLEGE

COMPREHENSIVE RECORDS SCHEDULE

No. C-459

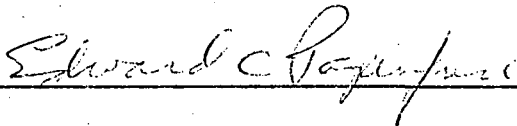
APPROVED: _____



President
Montgomery Community College

3/9/77
Date

APPROVED: _____



Archivist and Records Administrator
Maryland Hall of Records
Department of General Services

3/13/77
Date

APPROVED: _____

Secretary
Board of Public Works
State of Maryland

Date

The above signatures constitute legal approval of the record retention schedules contained in this manual.

COMPREHENSIVE RECORDS SCHEDULE

INTRODUCTION

The purpose of the Comprehensive Records Schedule is to bring under effective administrative control the current and non-current records maintained within the administrative offices of Montgomery College. The major objectives of the Schedule are to insure the proper retention of records of legal, administrative, and historical value and to provide for the systematic disposal of all other records as soon as they have fulfilled their usefulness.

The Schedule is divided into individual office schedules in a manner consistent with the general format used in the College Operating Budget. Each office schedule identifies and briefly describes all major record series located within the office and establishes a timetable governing the disposition of the records in office areas and, where applicable, in the College Archives. The term "retention" beneath the series description denotes the total minimum life span for the series. The "office" and "archives" categories indicate the minimum period of time that the series is to be retained in these areas. Further recommendations designed to facilitate the collection of important records are also indicated. "Offices of record," for example, are responsible for maintaining complete and accurate files of important, widely-dispersed documents until such time as they are deposited in the Archives.

The College Archivist, under the supervision of the Executive Assistant to the President, is responsible for insuring that the provisions of the Schedule are properly observed and implemented. He will also review the Schedule periodically in order to incorporate new record series under its provisions and to insure that retention and disposal rates meet the needs of the College. The transfer of records from office areas to the Archives will normally be initiated by the Archivist. Offices depositing records in the Archives in accordance with the provisions of the Schedule will receive a signed receipt for such deposits. The Archivist will not destroy office records covered by this Schedule without the concurrence of the appropriate administrator. Additional procedures governing records collection, access to archival records, and research activities in the College Archives are included in the College Policies and Procedures manual.

COMPREHENSIVE RECORDS SCHEDULE

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| Campus Dean | 51-52 |
| Campus Facilities Manager | 53 |
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| <u>GERMANTOWN CAMPUS</u> | 65 |
| Campus Dean | 66-67 |

COLLEGE ARCHIVES - PROCEDURES*

7.75 COLLEGE ARCHIVES (Approved by the President, February 1, 1977)

7.751 GENERAL

The primary goals of the archival program are to develop and implement systematic procedures for the proper retention, retirement, and retrieval of records currently being created, to assure the economical retention of records of long-term administrative and historical value, and to effect the disposal of all other records as soon as they have fulfilled their usefulness. The program further seeks to:

- (1) conserve scarce space by preventing the uncontrolled accumulation of inactive records and selectively microfilming vital college records, and
- (2) provide a central reference source for valuable administrative and historical information contained in non-current records.

7.752 PROCEDURES

a. Records Collection

- (1) Materials to be deposited in the College Archives are normally determined by the provisions of the Comprehensive Records Schedule for Montgomery Community College.
- (2) Records not covered by the Comprehensive Records Schedule may be added to the archival collections at the discretion of the College Archivist. Records in this category might include but not be limited to: personal papers and memorabilia of current or former faculty, staff, or students; public documents relating to the development of educational policy within the State of Maryland and Montgomery County; other selected records of unique historical value to the College as determined by the College Archivist.

b. Access to Records Located in the College Archives

- (1) Access to records deposited in the archives by college administrative offices and academic departments shall normally be restricted to the originating office or to other persons designated by the originating office or by the President, except that such restrictions or designations shall not conflict with law or ordinances of the various levels of government, established policies of the Board of Trustees, or approved college procedures governing access to confidential records.
- (2) Individuals depositing in the archives personal papers related to college matters may specify reasonable restrictions on access to such papers. However, all such restrictions must be in writing and agreed to by

*Source: Montgomery College Policies and Procedures Manual.

the individual and the College Archivist. If they cannot agree, the Executive Assistant to the President will be consulted.

- (3) Many of the records located in the College Archives are normally available to members of the college community and to the public without restriction. Such records would include but are not limited to: official minutes and reference files of the Board of Trustees; minutes and related records of various college organizations, such as the Faculty, Staff, and Student Senates; college and non-college publications; photographs; scrapbooks; clipping files; and miscellaneous historical memorabilia.

c. Research Activities in the College Archives

- (1) The College Archives is intended primarily for the use of college staff and students. Research in the archives by others is welcomed, however, for any purpose which can be serviced properly by the archives staff.
- (2) Records in the archives may be withdrawn at any time by the originating office or by the President. Otherwise, records are normally available for use only in the archives office.
- (3) The staff of the College Archives is available at all times to assist individuals in locating documents pertaining to specific subjects and using the records preserved in the archives. The College Archivist will conduct extensive research activities at the request of researchers and college personnel only insofar as the limited resources of the office permit.

CENTRAL ADMINISTRATION

| CAMPUS: CENTRAL ADMINISTRATION | OFFICE: BOARD OF TRUSTEES |
|--------------------------------|---|
| Item No. | Description and Retention |
| | <p><u>BOARD OF TRUSTEES OFFICIAL RECORDS, 1969 -</u> Official files of the Montgomery College Board of Trustees, including approved minutes of Board meetings and packets (reference file) containing agendas and background material for Board consideration during regular monthly, special, and budget review sessions.</p> <p>RETENTION: Permanent Office: (a) Retain Board minutes five years; office of record (b) Retain Board packets three years; office of record Archives: Permanent</p> |
| 1. | <p><u>BOARD OF TRUSTEES TOPICAL FILE, 1969 -</u> Confidential memoranda, with attachments, that the President forwards to the Board, and correspondence, memoranda, and miscellaneous subject files relating to follow-up action taken to conform to Board actions and directives.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| | |

RECORDS RETENTION SCHEDULE NUMBER 2

DEPT: CENTRAL ADMINISTRATION

OFFICE: PRESIDENT

Description and Retention

1. GENERAL CORRESPONDENCE AND OFFICE FILES, 1969 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the President.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

2. MIDDLE STATES ASSOCIATION FILE, 1950 -

Accreditation materials, including reports of accreditation teams, notifications, correspondence, and background material.

RETENTION: Permanent

Office: Retain materials relating to last accreditation

Archives: Permanent

3. CONTRACTS FILE, 1966 -

All contracts (except employee contracts, student activities contracts, and grant agreements) entered into by the College, as well as related correspondence, memoranda, and miscellaneous papers. The Executive Assistant to the President maintains all original contracts unless specified otherwise in the College policies and procedures manual.

RETENTION: Retain for six years after entire basic contract has been superceded.

Office: For total retention period and destroy

4. ADMINISTRATORS' LEAVE REPORTS/CA, c. 1967 -

Original leave reports signed by central office administrators when leave taken. These records support the bi-weekly report forwarded to the Payroll office.

RETENTION: Permanent

Office: Two years

Archives: Permanent

RECORDS RETENTION SCHEDULE NUMBER 2

OFFICE: CENTRAL ADMINISTRATION

OFFICE: PRESIDENT

Description and Retention

ASSOCIATION FILE, 1966 -

Constitutions, bylaws, rules, and regulations of associations of which the College is a member. This is a non-record file maintained for convenience by the Executive Assistant to the President.

RETENTION: Retain as long as the College remains a member and for one year thereafter.

Office: For total retention period and destroy

6. ANNUAL REPORTS /CA, c.1967 -
Annual reports of central administration offices.

RETENTION: Permanent

Office: Two years

Archives: Permanent

7. PRESIDENT'S ADVISORY COUNCILS, 1966 -
Minutes of the proceedings of the Councils and related records. Maintained by the Executive Assistant to the President.

RETENTION: Permanent

Office: Two years; office of record

Archives: Permanent

8. COMMITTEE ON COLLEGE INVESTMENTS AND BANK SELECTION, 1972 -
Minutes of the proceedings of the committee and related records. Maintained by the Executive Assistant to the President.

RETENTION: Permanent

Office: Two years; office of record

Archives: Permanent

9. ADMINISTRATORS' ASSOCIATION, 1969 -
Minutes and related records of the Administrators' Advisory Council and other formal college organizations of administrators.

RETENTION: Permanent

Office: Two years; office of record

Archives: Permanent

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: DEAN OF THE FACULTY

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1969 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Dean of the Faculty.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

FACULTY SENATE RECORDS, 1967 -

Minutes and related records of the proceedings of the Faculty Senate, general faculty meetings, and standing and special committees of the Senate, including the Academic Occasions committee, the Calendar committee, the committee on the Professional status of the Faculty, and the subcommittee on Contracts, Rank, and Tenure.

RETENTION: Permanent

Office: Three years; office of record

Archives: Permanent

FACULTY EVALUATIONS FILE, 1971 -

Evaluation forms and letters from department chairmen and other faculty members used by the subcommittee on Contracts, Rank, and Tenure in the annual evaluation process.

RETENTION: Three years

Office: Three years and destroy, except that materials of possible value during an evaluation for tenure shall be retained until such value ends.

FACULTY APPLICATIONS, 1968 -

Applications for faculty positions at the College.

RETENTION: Two years

Office: Two years and destroy

RECORDS RETENTION SCHEDULE NUMBER 4

| CAMPUS: CENTRAL ADMINISTRATION | OFFICE: INSTITUTIONAL RESEARCH & ANALYSIS |
|--------------------------------|---|
| - Description and Retention | |
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1970 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Dean of Institutional Research and Analysis.</p> <p>RETENTION: Three years. Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>HIGHER EDUCATION GENERAL INFORMATION SURVEY REPORTS, 1965 -</u> Statistical reports required by the Federal government relating to enrollment, finances, personnel, library, and other College operations. Different parts of the report are prepared throughout the year.</p> <p>RETENTION: Permanent Office: Ten years; microfilm periodically Archives: Permanent</p> |
| 3. | <p><u>ANNUAL STATISTICAL REPORT (FORMERLY REGISTRAR'S REPORT), 1948 -</u> Annual compilation of statistical data relating to enrollment, programs, courses, students, faculty, grades, and other College operations.</p> <p>RETENTION: Permanent Office: Ten years; microfilm periodically Archives: Permanent</p> |
| 4. | <p><u>STATE-MANDATED REPORTS, c. 1970 -</u> Enrollment and state aid reports for which the office of Institutional Research and Analysis is responsible. These reports are required by the Maryland State Department of Education, the Maryland State Board for Community Colleges, and the Maryland State Board for Higher Education.</p> <p>RETENTION: Permanent Office: Ten years; microfilm periodically Archives: Permanent</p> |
| | |

75: CENTRAL ADMINISTRATION

OFFICE: COLLEGE ARCHIVES

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1972 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the College Archivist.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends.

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: INTERNAL MANAGEMENT

Description and Retention

- | Item No. | Description and Retention |
|----------|--|
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1972 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Director of Internal Management.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>INSTITUTIONAL INSURANCE RECORDS, 1967 -</u> Policies, certificates of liability, correspondence, memoranda, renewal materials, some claims records, and miscellaneous materials relating to the administration and renewal of institutional insurance policies.</p> <p>RETENTION: Retain for six years after entire basic policy has been superceded. Office: For total retention period and destroy</p> |
| 3. | <p><u>POLICIES AND PROCEDURES MANUAL FILE, 1967 -</u> All modifications made to the manual as well as backup material for modifications to the manual.</p> <p>RETENTION: Five years Office: May be destroyed after five years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |

RECORDS RETENTION SCHEDULE NUMBER 7

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: INTERNAL AUDITING

Item No. Description and Retention

1. GENERAL CORRESPONDENCE AND OFFICE FILES, 1976 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Supervisor of Internal Auditing.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

2. INTERNAL AUDITOR REPORTS, FY1970 -

Financial and operating audits of College offices and operations.

RETENTION: Seven years

Office: Seven years and destroy

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: ACADEMIC VICE PRESIDENT

Description and Retention

1. GENERAL CORRESPONDENCE AND OFFICE FILES; 1976 -
Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Academic Vice President.

RETENTION: Three years
Office: May be destroyed after three years. Material having continuing administrative, legal or historical value, including records documenting the educational planning of current and future campuses, to be retained until such value ends or deposited in the Archives for permanent retention.

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: DEAN OF EDUCATION

Item
No.

Description and Retention

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| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1972 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Dean of Education.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value, including records documenting the educational planning of current and future campuses, to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>COLLEGE CURRICULUM ADVISORY COUNCIL, 1976 -</u> Minutes and related records of the proceedings of the Council.</p> <p>RETENTION: Permanent Office: Two years; office of record Archives: Permanent</p> |

RECORDS RETENTION SCHEDULE NUMBER 10

DEPT: CENTRAL ADMINISTRATION

OFFICE: STUDENT AFFAIRS/PROGRAM DEVELOPMENT

Description and Retention

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| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1970 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Dean of Student Affairs.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>ACADEMIC PROGRAMS FILE, 1968 -</u> Proposals, statements, surveys, reports, correspondence, memoranda, and miscellaneous papers relating to academic programs adopted by the College.</p> <p>RETENTION: Permanent Office: Permanent</p> |
| | <p><u>FEDERAL AND FEDERAL-STATE GRANTS FILE, 1968 -</u> Records of all grants of this type received by the College, including applications, proposals, agreements, any official papers covering the award, controlling rules and regulations, copies of periodic reports, and miscellaneous correspondence and memoranda. (Finance office maintains financial records documenting the expenditure of funds.)</p> <p>RETENTION: Retain six years after the close of the fiscal year in which expenditure was made or for that period of time required by federal and state records retention regulations for each grant, whichever is longer.</p> <p>Office: For total retention period and destroy</p> |
| 4. | <p><u>GENERAL SCHOLARSHIP FUND RECORDS, 1960 -</u> Records of contributions from individuals and organizations within the community providing financial assistance to students in accordance with the sponsor's requirements and the College's financial aid program, including master record card, agreement, publicity, correspondence, memoranda, and copies of cash receipt received from Cashier when contribution is deposited.</p> <p>RETENTION: Retain master record card permanently. All other materials may be destroyed six years after funds have been expended.</p> <p>Office: For total retention period</p> |

RECORDS RETENTION SCHEDULE NUMBER 10

| CAMPUS: CENTRAL ADMINISTRATION | OFFICE: STUDENT AFFAIRS /PROGRAM DEVELOPMENT |
|--------------------------------|---|
| Item No. | Description and Retention |
| 5. | <p><u>FOREIGN STUDENTS' RECORDS, 1970 -</u> Records of foreign students enrolled at the College on student visas, including copies of forms sent to the US Bureau of Immigration and any related papers.</p> <p>RETENTION: Retain for three years after student is no longer enrolled at the College or for that period of time required by federal records retention regulations, whichever is longer.</p> <p>Office: For total retention period and destroy</p> |
| 6. | <p><u>ACADEMIC REGULATIONS COMMITTEE, 1968 -</u> Minutes of the proceedings of this All-College committee and any related records.</p> <p>RETENTION: Permanent Office: Two years; office of record Archives: Permanent</p> |
| 7. | <p><u>CURRICULUM COMMITTEE, 1954 -</u> Minutes of the proceedings of this All-College committee and related working papers.</p> <p>RETENTION: Permanent Office: Retain minutes for two years, then transfer to Archives. Retain working papers permanently. Office of record Archives: Permanent</p> |
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MONTGOMERY COMMUNITY COLLEGE

RECORDS RETENTION SCHEDULE NUMBER 11

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: COMMUNITY SERVICES

Description and Retention

- | Item No. | Description and Retention |
|----------|---|
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1968 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Dean of Community Services.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>COMMUNITY SERVICES ADVISORY COMMITTEE, 1970 -</u> Minutes of the proceedings of the committee and any related papers.</p> <p>RETENTION: Permanent Office: Two years; office of record Archives: Permanent</p> |
| 3. | <p><u>ENROLLMENT FORMS AND CLASS LISTS, c. 1968 -</u> Forms documenting the enrollment of students in non-credit Community Services courses, and master class lists generated from the enrollment forms. State aid reports are also based on the enrollment forms.</p> <p>RETENTION: Six years or until audited, whichever is longer Office: Two terms Archives: For total retention period and destroy</p> |
| 4. | <p><u>SBCC COURSE APPROVAL RECORDS, July 1976 -</u> Copies of SBCC form CC-10, or equivalent, indicating state approval or disapproval of Community Services non-credit courses for state aid.</p> <p>RETENTION: Retain forms for courses that receive approval for that period of time that the course remains approved, and for six years thereafter. Retain forms for courses that are not approved for six years.</p> <p>Office: Retain form for all approved courses for as long as the course continues to be offered, then deposit in the Archives. Forms for non-approved courses to be deposited in the Archives. The deposit of all forms in the Archives shall take place once each year.</p> <p>Archives: For total retention period and destroy.</p> |

MONTGOMERY COMMUNITY COLLEGE

RECORDS RETENTION SCHEDULE NUMBER 11

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: COMMUNITY SERVICES

Item
No.

Description and Retention

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| 5. | <p><u>PROGRAM FILES, 1968 -</u> Folders for non-credit courses (except real estate courses) offered through the campuses or central office, including such items as instructors' contracts, handout materials, any evaluation sheets, record of any certificates granted, and related papers. Record copies of personnel actions are maintained in the Personnel office. Record copies of class lists and enrollment forms are maintained and scheduled separately.</p> <p>RETENTION: Seven years Office: Two years Archives: Five years and destroy; the Community Services office will retain a record of all certificates granted.</p> |
| 6. | <p><u>REAL ESTATE PROGRAM FILES, c. 1968 -</u> Folders for real estate courses offered through the office of Community Services, including such items as instructors' contracts, handout materials, any evaluation sheets, record of certificates granted, and related papers. Record copies of personnel actions are maintained in the Personnel Office. Record copies of class lists and enrollment forms are maintained and scheduled separately.</p> <p>RETENTION: Seven years Office: Seven years and destroy; the Community Services office will retain a record of all certificates granted for that period of time specified by state regulations.</p> |
| 7. | <p><u>COMMUNITY SERVICES CONFERENCES/WORKSHOPS RECORDS, 1969 -</u> Records of conferences and workshops sponsored by the office of Community Services, including handouts, budgets, record of proceedings, and related papers.</p> <p>RETENTION: Seven years Office: Two years Archives: Five years and destroy</p> |

MONTGOMERY COMMUNITY COLLEGE

RECORDS RETENTION SCHEDULE NUMBER 11

| CAMPUS: CENTRAL ADMINISTRATION | | OFFICE: COMMUNITY SERVICES |
|--------------------------------|--|----------------------------|
| Item No. | Description and Retention | |
| 8. | <p><u>FINANCIAL RECORDS, 1968 -</u> Deposit sheets, cash receipts, accounting records, and related financial records documenting the receipt of tuition and fees for non-credit courses offered through the Community Services office. Record copies of state aid reports are retained in the office of Institutional Research and Analysis. Record copies of cash receipts and expenditure records are retained in the Finance Office.</p> <p>RETENTION: (a) Four years or until audited, whichever is longer, for financial assistance invoices (special billings). (b) Six years or until audited, whichever is longer, for all other records.</p> <p>Office: Two years Archives: Two-four years and destroy.</p> | |
| 9. | <p><u>CREDIT PROGRAM FINANCIAL RECORDS, c. 1970 -</u> Financial cards, change of schedule forms, financial assistance invoices, registration source documents, and related financial records documenting the receipt of tuition and fees for credit courses offered through the Community Services office.</p> <p>RETENTION: Retain for the period of time specified for similar records maintained in the campus Cashiers' offices and the campus Registrars' offices (ex. financial cards for seven years; change of schedule forms and financial assistance invoices for four years; registration source documents for two years).</p> | |
| 10. | <p><u>FACULTY APPLICATIONS, 1971 -</u> Applications from individuals who have taught or who apply to teach in the Community Services programs of the College.</p> <p>RETENTION: Two years Office: Two years and destroy</p> | |

RECORDS RETENTION SCHEDULE NUMBER 12

| CAMPUS: CENTRAL ADMINISTRATION | | OFFICE: ADMINISTRATIVE VICE PRESIDENT |
|--------------------------------|---|---------------------------------------|
| Item No. | Description and Retention | |
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1965 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Administrative Vice President.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> | |
| 2. | <p><u>ADMINISTRATORS' PERSONNEL FOLDERS, 1946 -</u> Materials collected at time of employment, including application and letters of recommendation, copies of salary authorizations and personnel actions, and other materials relevant to the administrator's employment with the College.</p> <p>RETENTION: Twenty years after termination of employment Office: Retain while active and for one year after termination of employment. Permanent personnel records retained by the Finance office. Archives: Nineteen years and destroy</p> | |
| 3. | <p><u>ADMINISTRATIVE AND FACULTY CONTRACTS, 1946 -</u> Faculty and administrators' contracts with the College.</p> <p>RETENTION: Twenty years after termination of employment. Office: Retain while active and for one year after termination of employment. Permanent personnel records retained by the Finance office. Archives: Nineteen years and destroy</p> | |
| 4. | <p><u>DATA SYSTEMS STEERING COMMITTEE, 1970 -</u> Minutes of the proceedings of the committee and any related records.</p> <p>RETENTION: Permanent Office: Two years; office of record Archives: Permanent</p> | |

RECORDS RETENTION SCHEDULE NUMBER 13

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: PUBLIC INFORMATION

Description and Retention

- | Item No. | Description and Retention |
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| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, c. 1969 -</u> Memoranda, correspondence, and miscellaneous subject files relating to the activities of the office of the Director of Public Information.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>ALUMNI RECORDS, 1946 -</u> Names, addresses, completed questionnaires from former students, and related records.</p> <p>RETENTION: Permanent Office: Permanent</p> |
| 3. | <p><u>NEWS RELEASES, 1969 -</u> Periodic news releases relating to College activities, events, students, and staff.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> |
| 4. | <p><u>CLIPPINGS FILE, 1969 -</u> News clippings relating to the College from local newspapers.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> |

RECORDS RETENTION SCHEDULE NUMBER 14

| CAMPUS: CENTRAL ADMINISTRATION | | OFFICE: FINANCE |
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| ITEM NO. | Description and Retention | |
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1969 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Director of Finance.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> | |
| 2. | <p><u>GENERAL LEDGERS, FY1954 -</u> Record of financial transactions in all accounts during the fiscal year; not as detailed as the Statement of Transactions. Only the end-of-fiscal-year run is retained.</p> <p>RETENTION: Permanent Office: Three years Archives: Permanent; microfilm periodically and destroy paper records.</p> | |
| 3. | <p><u>STATEMENT OF TRANSACTIONS, FY1967 -</u> Detailed record of financial transactions in all accounts during the fiscal year. Only the end-of-fiscal-year run is retained.</p> <p>RETENTION: Permanent Office: Three years Archives: Permanent; microfilm periodically and destroy paper records.</p> | |
| 4. | <p><u>OPERATING BUDGET REPORT, FY1970 -</u> Summary of financial transactions in all accounts during the fiscal year recorded in a manner consistent with the format of the Operating Budget. Only the end-of-fiscal-year run is retained.</p> <p>RETENTION: Permanent Office: Three years Archives: Permanent; microfilm periodically and destroy paper records.</p> | |

RECORDS RETENTION SCHEDULE NUMBER 14

| CAMPUS: CENTRAL ADMINISTRATION | OFFICE: FINANCE |
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| Description and Retention | |
| <p>1. <u>INVESTMENT RECORDS, 1970 -</u> Records of all College investments, including policies and procedures to be followed, financial data, correspondence, and miscellaneous supporting data.</p> <p>RETENTION: Permanent Office: Permanent</p> | |
| <p>2. <u>CAPITAL PROJECTS FINANCIAL RECORDS, 1969 -</u> Copies of contracts for capital projects and records of payments made by the College under the terms of the contracts.</p> <p>RETENTION: Permanent Office: Retain for two years after project formally closed Archives: Permanent</p> | |
| <p>3. <u>PAYROLL RECORDS, 1967 -</u> Records documenting the payment of salaries to College employees, with supporting materials, including but not limited to the following: payroll registers; employee folders; attendance vouchers; leave reports; leave balance records; miscellaneous deductions; and W-2 forms.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent; microfilm periodically and destroy paper records.</p> | |
| <p>4. <u>FEDERAL AND FEDERAL-STATE GRANT FINANCIAL RECORDS, 1950's -</u> Copies of proposal, approved agreement, financial records documenting the receipt and expenditure of funds, and periodic required reports relating to federal and federal-state grants received by the College.</p> <p>RETENTION: Retain until an audit possible under terms of the grant is completed or, if no audit is performed, for six years after the close of the fiscal year in which the expenditure was made, or for that period of time required by federal and state records retention regulations, whichever is longer.</p> <p>Office: Retain until grant expires; microfilm periodically. Archives: For total retention period and destroy</p> | |
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RECORDS RETENTION SCHEDULE NUMBER 14

| CAMPUS: CENTRAL ADMINISTRATION | OFFICE: FINANCE |
|--------------------------------|---|
| Description and Retention | |
| 9. | <p><u>NATIONAL DEFENSE STUDENT LOAN RECORDS, 1960 -</u> Original request for loan, conditions of loan, correspondence, promissary notes, record of payments, and related items.</p> <p>RETENTION: Retain six years after loan fully paid or for that period of time required by federal records retention regulations, whichever is longer. Office: Retain until loan fully paid Archives: For total retention period and destroy</p> |
| 10. | <p><u>BANK STATEMENTS, 1969 -</u> Monthly statements received from the bank, with worksheets.</p> <p>RETENTION: Six years or until audited, whichever is longer Office: Two years Archives: Four years and destroy</p> |
| 11. | <p><u>CANCELLED CHECKS, 1967 -</u> Cancelled payroll and vendor checks returned by the bank.</p> <p>RETENTION: Six years or until audited, whichever is longer Office: Two years Archives: Four years and destroy</p> |
| 12. | <p><u>CASH RECEIPTS, 1969 -</u> Finance office copies of cash receipts issued throughout the College.</p> <p>RETENTION: Six years or until audited, whichever is longer Office: Two years Archives: Four years and destroy</p> |
| 13. | <p><u>AUXILIARY ENTERPRISES FINANCIAL RECORDS, 1969 -</u> Copies of periodic inventories, reports, and statements of revenue and disbursements.</p> <p>RETENTION: Six years or until audited, whichever is longer Office: Six years and destroy</p> |

RECORDS RETENTION SCHEDULE NUMBER 14

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: FINANCE

| Item No. | Description and Retention |
|----------|---|
| 14. | <p><u>CHECK VOUCHERS, 1967 -</u> Alphabetical and numerical copies of all vouchers (except payroll vouchers) that accompany checks to vendors, etc.. The numerical copy includes supporting documents such as an additional copy of the purchase order or a vendor invoice.</p> <p>RETENTION: Six years or until audited, whichever is longer Office: Two years Archives: Four years and destroy</p> |
| 15. | <p><u>PURCHASE ORDERS, 1967 -</u> Alphabetical and numerical copies of College purchase orders prepared by the Procurement office, kept separately.</p> <p>RETENTION: Four years or until audited, whichever is longer Office: Two years Archives: Two years and destroy</p> |
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| CAMPUS: CENTRAL ADMINISTRATION | OFFICE: SUPERVISOR OF CASHIERS |
|--------------------------------|--|
| Description and Retention | |
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, c. 1967 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Supervisor of Cashiers and the Campus Cashiers.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>FINANCIAL CARDS, 1968 -</u> Record of tuition and fees paid by students each semester, including name of student, social security number, address, course numbers, semester hours, and charges for tuition and fees.</p> <p>RETENTION: Seven years or until audited, whichever is longer. Office: Two years Archives: Five years and destroy</p> |
| 3. | <p><u>CASH RECEIPTS, 1968 -</u> Copies of cash receipts issued for monies received in the Campus Cashiers' offices.</p> <p>RETENTION: Six years or until audited, whichever is longer Office: One year Archives: Five years and destroy</p> |
| 4. | <p><u>CASH REGISTER DETAIL TAPES, 1968 -</u> Detail tapes from cash registers in Campus Cashiers' offices.</p> <p>RETENTION: Six years or until audited, whichever is longer Office: One year Archives: Five years and destroy</p> |
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RECORDS RETENTION SCHEDULE NUMBER 15

| CAMPUS: CENTRAL ADMINISTRATION | | OFFICE: SUPERVISOR OF CASHIERS |
|--------------------------------|---|--------------------------------|
| Item No. | Description and Retention | |
| 5. | <p><u>DEPOSIT BOOKS, 1968 -</u> Records of deposits made by the Campus Cashiers to the College bank account.</p> <p>RETENTION: Six years or until audited, whichever is longer Office: One year Archives: Five years and destroy</p> | |
| 6. | <p><u>CASH REGISTER RECEIPTS, 1968 -</u> Summary of tuition and fees received through the Registrars' offices, with cash receipt recording monies deposited in the College's bank account.</p> <p>RETENTION: Six years or until audited, whichever is longer Office: One year Archives: Five years and destroy</p> | |
| 7. | <p><u>CASH REGISTER REPORTS, 1968 -</u> Copies of cash register reports and tapes that may accompany deposits made by auxiliary enterprises. The reports are used to verify deposits.</p> <p>RETENTION: Six years or until audited, whichever is longer Office: One year Archives: Five years and destroy</p> | |
| 8. | <p><u>FINANCIAL ASSISTANCE INVOICES, 1972 -</u> Copies of special billings sent to those organizations that pay all or part of the tuition and/or fees of students. Payment is recorded on the student financial cards.</p> <p>RETENTION: Four years or until audited, whichever is longer Office: One year Archives: Three years and destroy</p> | |

RECORDS RETENTION SCHEDULE NUMBER 15

| CAMPUS: CENTRAL ADMINISTRATION | OFFICE: SUPERVISOR OF CASHIERS |
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| Item No. | Description and Retention |
| 9. | <p><u>UNPAID PARKING TICKETS, 1972 -</u> Unpaid parking tickets issued on the campuses.</p> <p>RETENTION: Three years or until audited, whichever is longer Office: For total retention period and destroy</p> |
| 10. | <p><u>MATRICULATION FEE RECEIPTS, 1950 -</u> Copies of receipts for matriculation fee paid by all students who are admitted to a degree or certificate curriculum.</p> <p>RETENTION: Retain as long as College policy states that this fee is payable only once, or for six years, whichever is longer. Office: For total retention period and destroy</p> |
| | |

BUS: CENTRAL ADMINISTRATION

OFFICE: AFFIRMATIVE ACTION

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1975 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Director of Affirmative Action.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

AFFIRMATIVE ACTION RECORDS, 1975 -

Reports and supporting data documenting the College affirmative action program, including federal EEO-6 and Title IX Self-Evaluation reports, and related reports and evaluations.

RETENTION: Retain reports ten years, and supporting data three years, or for that period of time required by federal and state records retention regulations, whichever is longer.

Office: Retain reports for five years.

Retain supporting data for three years and destroy

Archives: Retain reports for total retention period and destroy

CAMPUS: CENTRAL ADMINISTRATION

OFFICE: BUDGET

Item
No.

Description and Retention

1. GENERAL CORRESPONDENCE AND OFFICE FILES, 1969 -
 Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Supervisor of Budgeting.

 RETENTION: Three years
 Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

2. OPERATING BUDGET WORKING PAPERS, FY1970
 Source materials, original budget requests, budget review materials, drafts of budget at various stages, and related materials pertaining to the development of the annual operating budget.

 RETENTION: Five years
 Office: Five years and destroy

BUS: CENTRAL ADMINISTRATION

OFFICE: PERSONNEL

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1967 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the Office of the Director of Personnel.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

STAFF PERSONNEL FOLDERS, 1950's -

Materials collected at time of employment, including application and letters of recommendation, salary action authorizations (salary file), evaluations, and other materials relevant to the individual's employment with the College.

RETENTION: Twenty years after termination of employment.

Office: Retain while active and for one year after termination of employment. Permanent personnel records retained by the Finance office.

Archives: Nineteen years and destroy

FACULTY/ADMINISTRATORS SALARY FILE, 1967 -

Personnel action forms for full-time and part-time faculty and for the administrative staff.

RETENTION: Twenty years after termination of employment.

Office: Permanent personnel records maintained by the Finance office. Retain forms for full-time faculty and administrators for the total retention period and destroy. Retain forms for part-time faculty for two years.

Archives: Retain forms for part-time faculty eighteen years and destroy.

STUDENT/TEMPORARIES PERSONNEL RECORDS, c. 1950 -

Folders containing employment information, c.1950-1969, when they were discontinued; cards, personnel action forms, and related records since 1969.

RETENTION: Twenty years after termination of employment.

Office: Permanent personnel records maintained by the Finance office.

Office: Five years after termination of employment

Archives: Fifteen years and destroy

RECORDS RETENTION SCHEDULE NUMBER 18

BUS: CENTRAL ADMINISTRATION

OFFICE: PERSONNEL

Description and Retention

RETIREMENT BENEFITS RECORDS, 1967 -

Contracts with insuring agency, enrollment cards and forms, reports, and miscellaneous material.

RETENTION: Permanent
Office: Two years after coverage terminated.
Archives: Permanent

STUDENT INSURANCE RECORDS, 1967 -

Contracts with insuring agency, enrollment cards and forms, claims and payments materials, source documents such as insurance cards and insurance waivers, and any related records.

RETENTION: Twenty years after termination of policy, except that source documents may be destroyed after three years.
Office: Two years after termination of policy
Archives: Eighteen years and destroy

PERSONNEL HEALTH INSURANCE RECORDS, 1967 -

Contracts with insuring agency, enrollment cards and forms, and related material.

RETENTION: Twenty years after termination of policy
Office: Two years after termination of policy
Archives: Eighteen years and destroy

PERSONNEL LIFE INSURANCE RECORDS, 1967 -

Contracts with insuring agency, enrollment cards and forms, and related material.

RETENTION: Twenty years after termination of policy
Office: Two years after termination of policy
Archives: Eighteen years and destroy

WORKINGMEN'S COMPENSATION RECORDS, 1967 -

Injury reports, medical reports, bills, and related material.

RETENTION: Twenty years
Office: Two years
Archives: Eighteen years and destroy

RECORDS RETENTION SCHEDULE NUMBER 18

BUS: CENTRAL ADMINISTRATION

OFFICE: PERSONNEL

Description and Retention

PERSONNEL CLASSIFICATION FILE, 1969 -

Working file of classification specifications, specific job descriptions, list of budgeted positions, and related information.

RETENTION: Permanent

Office: Permanent

STAFF REVIEW BOARD, 1969 -

Records of the Staff Review Board, including minutes and packets, relating mainly to the reclassification of staff positions.

RETENTION: Permanent

Office: Two years; office of record

Archives: Permanent

STAFF SENATE RECORDS, 1970 -

Minutes and related records of the Staff Association, the Staff Senate, and its permanent committees.

RETENTION: Permanent

Office: Two years; office of record

Archives: Permanent

EAP/TUITION WAIVER RECORDS, 1971 -

Application forms and any related records documenting the participation of College employees in Educational Assistance Plan benefits and Tuition Waiver Plan benefits.

RETENTION: Six years

Office: Two years

Archives: Four years and destroy

APPLICATIONS, 1975 -

Applications for Staff and administrative positions at the College.

RETENTION: Two years

Office: Two years and destroy

RECORDS RETENTION SCHEDULE NUMBER 19

S: CENTRAL ADMINISTRATION

OFFICE: PROCUREMENT

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1967 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Director of Procurement.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

PURCHASE ORDERS, 1967 -

Alphabetical and numerical copies of College purchase orders.

RETENTION: Four years or until audited, whichever is longer

Office: Two years

Archives: Two years and destroy

REQUISITIONS, 1967 -

Signed requisition forms supporting purchase orders.

RETENTION: Four years or until audited, whichever is longer

Office: Two years

Archives: Two years and destroy

BIDS FILE, 1967 -

Formal and informal bid forms, tabulations, and specifications.

RETENTION: Four years or until audited, whichever is longer

Office: Two years

Archives: Two years and destroy

WAREHOUSE ORDERS, 1967 -

Order forms for items drawn from the Montgomery County Public Schools warehouse.

RETENTION: Four years or until audited, whichever is longer

Office: Two years

Archives: Two years and destroy

RECORDS RETENTION SCHEDULE NUMBER 19

| | |
|---|---------------------|
| S: CENTRAL ADMINISTRATION | OFFICE: PROCUREMENT |
| Description and Retention | |
| <p><u>STORES REQUISITIONS, 1970 -</u> Received copies of stores requisitions forms used for drawing supplies from the College central stores.</p> <p>RETENTION: Four years or until audited, whichever is longer Office: Two years Archives: Two years and destroy</p> | |
| <p><u>RECEIVING REPORTS, 1972 -</u> Receipt forms for items received in the central receiving area. This record series includes another copy of the purchase order and a delivery record.</p> <p>RETENTION: Four years or until audited, whichever is longer Office: Two years Archives: Two years and destroy</p> | |
| <p><u>PROPERTY CONTROL REPORTS AND RECORDS, c. 1967 -</u> Records documenting the acquisition and internal control of inventorial property of the College.</p> <p>RETENTION: Permanent Office: Permanent; office of record</p> | |
| | |

RECORDS RETENTION SCHEDULE NUMBER 20

S: CENTRAL ADMINISTRATION

OFFICE: DATA SYSTEMS

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1969 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Director of Data Systems.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

PROGRAM DOCUMENTATION FOLDERS, c. 1968 -

Folders containing documentation for computer programs used in the college Data Systems Center.

RETENTION: Retain for that period of time that the computer program remains in use.

Office: New programs and updates to existing programs to be microfilmed annually for security purposes.

Archives: Retain microfilm for that period of time that the computer program remains in use.

RECORDS RETENTION SCHEDULE NUMBER 21

BUS: CENTRAL ADMINISTRATION

OFFICE: COLLEGE FACILITIES

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1967 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Director of College Facilities.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

CAPITAL PROJECTS RECORDS, c.1967 -

Records relating to capital development projects, including legal, financial, planning, construction, and state and federal funding files, as well as correspondence, reports, specifications, drawings, plans, and miscellaneous materials.

RETENTION: Permanent

Office: Retain files on individual projects for two years after project formally closed.

Archives: Permanent

RECORDS RETENTION SCHEDULE NUMBER 22

| CAMPUS: CENTRAL ADMINISTRATION | OFFICE: CENTRALIZED MAINTENANCE |
|--------------------------------|--|
| Description and Retention | |
| 1. | <p><u>SPECIFICATIONS, PLANS, AND DRAWINGS, 1890 -</u> Specifications, plans, and drawings of buildings, systems, and equipment now in service.</p> <p>RETENTION: Permanent Office: Permanent</p> |
| 2. | <p><u>CENTRALIZED MAINTENANCE ACCOUNTS FILES, 1969 -</u> Records of supplies and equipment ordered for college facilities, including requisitions and related papers providing a full description of each item ordered and why it was needed.</p> <p>RETENTION: Retain for the life of the equipment and for three years thereafter Office: For total retention period and destroy</p> |
| 3. | <p><u>LAWS, CODES, RULES, AND POLICIES, 1965 -</u> Records relating to legal requirements and established College policies governing college facilities.</p> <p>RETENTION: Permanent Office: Permanent</p> |
| | <p><u>MAINTENANCE PROGRAMS FILE, 1920 -</u> Specific information, including correspondence, memoranda, literature, etc., regarding buildings, systems, and equipment in service.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative or legal value to the office to be retained until such value ends.</p> |

: CENTRAL ADMINISTRATION

OFFICE: CENTRALIZED MAINTENANCE

Description and Retention

INSPECTION SHEETS, 1971 -

Equipment check forms prepared daily by stationary engineers.

RETENTION: Three years

Office: One year

Archives: Two years and destroy

SERVICE REQUESTS RECORDS, 1970 -

Service request forms, with record of work completed.

RETENTION: Three years

Office: One year

Archives: Two years and destroy

TAKOMA PARK CAMPUS

RECORDS RETENTION SCHEDULE NUMBER 23

CAMPUS: TAKOMA PARK CAMPUS

OFFICE: CAMPUS DEAN

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1967 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Campus Dean, Takoma Park Campus.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

FACULTY PERSONNEL FOLDERS/TP, 1946 -

Materials collected at time of employment, including application form and letters of recommendation, copies of salary action authorizations, evaluation materials, and other papers relating to the individual's full-time or part-time employment with the College.

RETENTION: Twenty years after termination of employment

Office: Retain while active and for two years after termination of employment. Permanent personnel records retained by the Finance office.

Archives: Eighteen years and destroy

CAMPUS ASSEMBLY RECORDS/TP, 1967 -

Minutes of the proceedings of the Takoma Park Campus Assembly, its permanent committees, and any related records.

RETENTION: Permanent

Office: Two years; office of record.

Archives: Permanent

RECORDS RETENTION SCHEDULE NUMBER 23

| | |
|--|---------------------|
| S: TAKOMA PARK | OFFICE: CAMPUS DEAN |
| Description and Retention | |
| <p><u>ANNUAL REPORTS/TP, c.1965 -</u> Annual reports of academic departments and administrative offices on the Takoma Park Campus.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> | |
| <p><u>FACULTY LEAVE REPORTS/TP, c.1970 -</u> Original leave reports signed by Campus faculty when leave is taken. These records support the bi-weekly report forwarded to the Payroll office.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> | |
| <p><u>ADMINISTRATORS' LEAVE REPORTS/TP, c.1967 -</u> Original leave reports signed by Campus administrators when leave is taken. These records support the bi-weekly report forwarded to the Payroll office.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> | |
| | |

RECORDS RETENTION SCHEDULE NUMBER 24

TUS: TAKOMA PARK CAMPUS

OFFICE: BUSINESS MANAGER

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1967 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Business Manager.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

RECORDS RETENTION SCHEDULE NUMBER 25

BUS: TAKOMA PARK CAMPUS

OFFICE: SECURITY SERVICES

Description and Retention

SECURITY LOG BOOKS AND OFFENSE REPORTS/TP, c.1965 -

Daily record of security checks and offenses committed, and offense reports prepared as required.

RETENTION: Twenty years
Office: Five years
Archives: Fifteen years and destroy

PARKING TICKETS /TP, 1968 -

Copies of parking tickets issued on the Takoma Park Campus.

RETENTION: Retain for three years after ticket paid or until audited,
whichever is longer
Office: For total retention period and destroy

VEHICLE REGISTRATION CARDS/TP, 1950 -

Registration cards completed by Takoma Park students and employees, including name, make of car, owner, tag number, and registration number.

RETENTION: Three years after termination of registration
Office: For total retention period and destroy

RECORDS RETENTION SCHEDULE NUMBER 26

CAMPUS: TAKOMA PARK CAMPUS

OFFICE: HUMANITIES AND SOCIAL SCIENCE
DIVISION OFFICE

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1967 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the Humanities and Social Science Division office.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

SUMMARIES OF COURSE CONTENT-HUMANITIES/TP, 1967 -

Copies of course objectives, course outline, and final examination for all courses offered in the Division of Humanities and Social Sciences.

RETENTION: Five years

Office: Two years

Archives: Three years and destroy, except that materials having administrative value during re-accreditation periods to be retained until such value ends.

DEPARTMENT CHAIRMEN MEETINGS-HUMANITIES/TP, 1967 -

Minutes of the proceedings of Department Chairmen meetings, Division of Humanities and Social Sciences, and any related papers.

RETENTION: Permanent

Office: Two years

Archives: Permanent

SUS: TAKOMA PARK CAMPUS

OFFICE: MATHEMATICS AND SCIENCE DIVISION
OFFICE

Description and Retention

GENERAL CORRESPONDENCE AND OFFICE FILES, 1967 -

Correspondence, memoranda, and miscellaneous subject files relating to the activities of the Mathematics and Science Division office.

RETENTION: Three years

Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

SUMMARIES OF COURSE CONTENT-MATH & SCIENCE 'TP, 1968 -

Copies of course objectives, course outline, and final examination for all courses offered in the Division of Mathematics and Science.

RETENTION: Five years

Office: Two years

Archives: Three years and destroy, except that materials having administrative value during re-accreditation periods to be retained until such value ends.

DEPARTMENT CHAIRMEN MEETINGS-MATH & SCIENCE 'TP, -

Minutes of the proceedings of Department Chairmen meetings, Division of Mathematics and Science, and any related papers.

RETENTION: Permanent

Office: Two years

Archives: Permanent

RECORDS RETENTION SCHEDULE NUMBER 28

| OFFICE: TAKOMA PARK CAMPUS | OFFICE: STUDENT SERVICES |
|---|--------------------------|
| Description and Retention | |
| <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1965 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of Student Services.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> | |
| <p><u>STUDENT PERMANENT RECORD CARDS /TP, 1946 -</u> Official record of grades received by all students currently or formerly enrolled at the Takoma Park campus and at some off-campus extension centers.</p> <p>RETENTION: Permanent Office: Permanent Archives: Records for 1946-1967 on microfilm to be retained permanently. Disposition of hard copy records for these years to be determined by the Dean of Student Affairs.</p> | |
| <p><u>STUDENT FOLDERS /TP, 1964 -</u> Application form, transcripts, test scores, acceptance letter, counselor interview notes, unsatisfactory progress reports, copies of mid-semester and final grades, and any miscellaneous items.</p> <p>RETENTION: Retain while student is enrolled and for four years thereafter Office: For total retention period and destroy after verifying that Permanent Record Card is intact.</p> | |
| <p><u>BLISS ELECTRICAL SCHOOL STUDENT GRADE RECORDS, 1910-1950.</u> Grade records of students who attended Bliss Electrical School, including Grade Books, 1910-21, Grade Cards, 1922-50, and a card index.</p> <p>RETENTION: Permanent Office: Transfer to Archives Archives: Retain microfilm copy permanently. Disposition of hard copy records to be determined by the Dean of Student Affairs.</p> | |
| | |

RECORDS RETENTION SCHEDULE NUMBER 28

| CAMPUS: TAKOMA PARK | OFFICE: STUDENT SERVICES |
|--|--------------------------|
| Description and Retention | |
| <p><u>US NAVY ELECTRICIAN'S MATES SCHOOL STUDENT GRADE RECORDS, 1942-45; 1951-53.</u> Grade cards for naval personnel enrolled in the program conducted by Bliss Electrical School, 1942-45, and Montgomery Junior College, 1951-53.</p> <p>RETENTION: Permanent Office: Transfer to Archives Archives: Retain microfilm copy permanently. Disposition of hard copy records to be determined by the Dean of Student Affairs.</p> | |
| <p><u>CARVER JUNIOR COLLEGE STUDENT GRADE RECORDS, 1950-1956.</u> A very small, incomplete set of grade cards for students enrolled at Carver Junior College.</p> <p>RETENTION: Permanent Office: Transfer to Archives Archives: Retain microfilm copy permanently. Disposition of hard copy records to be determined by the Dean of Student Affairs.</p> | |
| <p><u>DENTAL ASSISTING GRADE RECORDS, 1966-1972.</u> Grade records of students who enrolled in non-credit Dental Assisting evening courses offered on the Takoma Park Campus.</p> <p>RETENTION: Permanent Office: Transfer to Archives Archives: Permanent</p> | |
| <p><u>SCIENCE SEMINARS ATTENDANCE RECORDS, 1964-1966.</u> Attendance records of public school teachers who participated in various science seminars offered at the Takoma Park Campus.</p> <p>RETENTION: Permanent Office: Transfer to Archives Archives: Permanent</p> | |
| <p><u>STUDENT GRADE VERIFICATION BOOKS/TP, 1950 -</u> DPS sheets recording students' names and final grades received in each section of each course and signed by instructor.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> | |

CAMPUS: TAKOMA PARK

OFFICE: STUDENT SERVICES

| Serial No. | Description and Retention |
|------------|---|
| | <p><u>REGISTRATION SOURCE DOCUMENTS /TP, 1965 -</u> Various forms and listings, including Program of Studies, which document the early registration, regular registration, and late registration of students. These are non-record source documents. Information of continuing value is located in the Student Grade Verification books and in the Student Permanent Record Cards. Official enrollment data is maintained in the office of Institutional Research and Analysis.</p> <p>RETENTION: Two years Office: Two years and destroy</p> |
| | <p><u>STUDENT CLASS LISTS/TP, 1969 -</u> DPS sheets recording the names and social security numbers of students in each section of each course. These are non-record source documents maintained for purposes of registration. Information of continuing value is located in the Student Grade Verification books and in the Student Permanent Record Cards. Official enrollment data is maintained by the office of Institutional Research and Analysis.</p> <p>RETENTION: One year Office: One year and destroy</p> |
| | <p><u>STUDENT CHANGE OF SCHEDULE FORMS/TP, 1969 -</u> Copies of drop-add forms recording changes in students' schedules.</p> <p>RETENTION: Three years Office: Three years and destroy</p> |
| | <p><u>STUDENT FINANCIAL AID FOLDERS/TP, 1967 -</u> Record of all financial aid received by individual students, including application form, parent's (or student's) confidential form, financial need analysis report, award letter, reply sheet, and any miscellaneous supporting documents.</p> <p>RETENTION: Retain six years after the close of the fiscal year in which the expenditure was made or for that period of time required by federal and state records retention regulations, whichever is longer.</p> <p>Office: Retain for two years after student ceases to receive aid Archives: For total retention period and destroy</p> |

TPS: TAKOMA PARK

OFFICE: STUDENT SERVICES

Description and Retention

STUDENT FINANCIAL AID HISTORY/TP, 1971 -

Periodic listing of basic information relating to aid provided to all students, including names, social security numbers, test scores, financial need, amount awarded, and program. Only the end of the academic year run is retained.

RETENTION: Permanent

Office: Retain until no longer required for immediate reference,
then deposit in Archives

Archives: Permanent

STUDENT MEDICAL RECORDS /TP, 1968 -

Records of physical examinations given at admission, examinations given to athletes, accident reports, Nursing Program immunization records, and miscellaneous items.

RETENTION: (a) Five years for Nursing Program immunization records

(b) Three years for all other records

Office: For total retention period and destroy

STUDENT-FACULTY DISCIPLINARY BOARD/TP, 1970 -

Correspondence and miscellaneous papers recording the proceedings and actions of periodically convened disciplinary boards.

RETENTION: Ten years

Office: Ten years and destroy

STUDENT ACTIVITIES CONTRACTS, c. 1965 -

Contracts between the College and entertainers or others who are employed by the student program council at the Takoma Park Campus.

RETENTION: Six years

Office: Six years and destroy; office of record.

STUDENT GOVERNMENT RECORDS/TP, 1968

Minutes of the proceedings of the Takoma Park Student Association, the Student Senate, and any related records.

RETENTION: Permanent

Office: Two years; office of record.

Archives: Permanent

RECORDS RETENTION SCHEDULE NUMBER 29

CAMPUS: TAKOMA PARK CAMPUS

OFFICE: BOOKSTORE

Description and Retention

BOOKSTORE FINANCIAL RECORDS /TP, 1967 -

Records documenting the operations of the Campus bookstore, including the following: cash register reports; cash receipts; inventories; cash register tapes; bookstore purchase orders, including supporting requisitions, invoices, and related materials; book returns records, including request forms, freight bills, and credit memoranda; students' charge records, including letter of authorization, copy of bill for books and supplies received, and copy of cash receipt received after payment made to the Cashier.

- RETENTION: (a) Retain bookstore purchase orders and supporting documents for four years or until audited, whichever is longer.
 (b) Retain all other records for six years or until audited, whichever is longer.

Office: Two years

- Archives: (a) Two years and destroy
 (b) Four years and destroy

CAMPUS: TAKOMA PARK CAMPUS

OFFICE: FOOD SERVICES

1

Description and Retention

CAFETERIA FINANCIAL RECORDS/TP, 1970 -

Records documenting the operations of the Campus cafeteria, including the following: income record of receipts; cash register reports; inventories; purchase forms listing payments to vendors; invoices from vendors; cash register tapes; request forms for cafeteria services and related reports.

RETENTION: Six years or until audited, whichever is longer

Office: One year

Archives: Five years and destroy

| OFFICE: ROCKVILLE CAMPUS | OFFICE: CAMPUS DEAN |
|--|---------------------|
| Description and Retention | |
| <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1967 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Campus Dean, Rockville Campus.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> | |
| <p><u>FACULTY PERSONNEL FOLDERS/RK, 1965 -</u> Materials collected at time of employment, including application form and letters of recommendation, copies of salary action authorizations, evaluation materials, and other papers relating to the individual's full-time or part-time employment with the College.</p> <p>RETENTION: Twenty years after termination of employment Office: Retain while active and for two years after termination of employment. Permanent personnel records retained by the Finance office. Archives: Eighteen years and destroy</p> | |
| <p><u>CAMPUS ASSEMBLY RECORDS/RK, 1967 -</u> Minutes of the proceedings of the Rockville Campus Assembly, its permanent committees, and any related records.</p> <p>RETENTION: Permanent Office: Two years; office of record. Archives: Permanent</p> | |
| <p><u>ANNUAL REPORTS /RK, 1965 -</u> Annual reports of academic departments and administrative offices on the Rockville Campus.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> | |
| | |

RECORDS RETENTION SCHEDULE NUMBER 31

CAMPUS: ROCKVILLE

OFFICE: CAMPUS DEAN

Description and Retention

FACULTY LEAVE REPORTS/RK, c. 1970 -

Original leave reports signed by Campus faculty when leave is taken. The records support the bi-weekly report forwarded to the Payroll office.

RETENTION: Permanent

Office: Two years

Archives: Permanent

ADMINISTRATORS' LEAVE REPORTS/RK, c. 1967 -

Original leave reports signed by Campus administrators when leave is taken. These records support the bi-weekly report forwarded to the Payroll office.

RETENTION: Permanent

Office: Two years

Archives: Permanent

| CAMPUS: ROCKVILLE CAMPUS | OFFICE: CAMPUS FACILITIES MANAGER |
|--------------------------|--|
| Item No. | Description and Retention |
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1969 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Campus Facilities Manager.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>SPACE RESERVATION FILE/RK, 1969 -</u> Record of all events taking place on the Rockville Campus requiring the use of College facilities, including original request, reservation form, copy of receipt indicating payment has been made to Cashier, and any related papers.</p> <p>RETENTION: Ten years Office: Five years Archives: Five years and destroy</p> |
| | |

RECORDS RETENTION SCHEDULE NUMBER 33

| CAMPUS: ROCKVILLE CAMPUS | OFFICE: SECURITY AND SAFETY |
|---------------------------|---|
| Description and Retention | |
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, c. 1969 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Director of Security and Safety.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>SECURITY LOG BOOKS AND OFFENSE REPORTS/RK, 1969 -</u> Daily record of security checks and offenses committed, and offense reports prepared as required.</p> <p>RETENTION: Twenty years Office: Five years Archives: Fifteen years and destroy</p> |
| 3. | <p><u>PARKING TICKETS/RK, 1965 -</u> Copies of parking tickets issued on the Rockville campus.</p> <p>RETENTION: Retain for three years after ticket paid or until audited, whichever is longer Office: For total retention period and destroy</p> |
| 4. | <p><u>VEHICLE REGISTRATION CARDS/RK, 1965 -</u> Registration cards completed by Rockville students and employees, including name, make of car, owner, tag number, and registration number.</p> <p>RETENTION: Three years after termination of registration Office: For total retention period and destroy</p> |
| | |

RECORDS RETENTION SCHEDULE NUMBER 34

CAMPUS: ROCKVILLE CAMPUS

OFFICE: ACADEMIC DEAN

| Item No. | Description and Retention |
|----------|--|
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1965 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Academic Dean.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>SUMMARIES OF COURSE CONTENT/RK, 1965 -</u> Copies of course objectives, course outline, and final examination for all courses offered on the Rockville campus</p> <p>RETENTION: Five years Office: (Department Chairmen) Five years and destroy, except that material having administrative value during re-accreditation periods to be retained until such value ends.</p> |
| 3. | <p><u>DEPARTMENT CHAIRMEN MEETINGS/RK, 1970 -</u> Minutes of the proceedings of Rockville Department Chairmen meetings and any related papers.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> |
| | |

CAMPUS: ROCKVILLE

OFFICE: EDUCATIONAL RESOURCES

Item
No.

Description and Retention

1. GENERAL CORRESPONDENCE AND OFFICE FILES, 1969 -
 Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Director of Educational Resources.

RETENTION: Three years
Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.

RECORDS RETENTION SCHEDULE NUMBER 36

| CAMPUS: ROCKVILLE CAMPUS | OFFICE: STUDENT SERVICES |
|--------------------------|---|
| Item No. | Description and Retention |
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1967 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of Student Services.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>STUDENT PERMANENT RECORD CARDS/RK, 1967 -</u> Official record of grades received by all students currently or formerly enrolled at the Rockville campus and at some off-campus extension centers.</p> <p>RETENTION: Permanent Office: Permanent</p> |
| 3. | <p><u>STUDENT FOLDERS/RK, 1967 -</u> Application form, transcripts, test scores, acceptance letter, counselor interview notes, unsatisfactory progress reports, copies of mid-semester and final grades, and any miscellaneous items.</p> <p>RETENTION: Retain while student is enrolled and for four years thereafter. Office: For total retention period and destroy after verifying that Permanent Record Card is intact.</p> |
| 4. | <p><u>STUDENT GRADE VERIFICATION BOOKS/RK, 1965 -</u> DPS sheets recording students' names and final grades received in each section of each course and signed by instructor.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> |
| | |

RECORDS RETENTION SCHEDULE NUMBER 36

CAMPUS: ROCKVILLE

OFFICE: STUDENT SERVICES

Description and Retention

5. STUDENT CLASS LISTS/RK, 1971.-

DPS sheets recording the names and social security numbers of students in each section of each course. These are non-record source documents maintained for purposes of registration. Information of continuing value is located in the Student Grade Verification books and in the Student Permanent Record Cards. Official enrollment data is maintained by the office of Institutional Research and Analysis.

RETENTION: One year

Office: One year and destroy

6. STUDENT CHANGE OF SCHEDULE FORMS/RK, 1965 -

Copies of drop-add forms recording changes in students' schedules.

RETENTION: Three years

Office: Three years and destroy

REGISTRATION SOURCE DOCUMENTS/RK, 1965 -

Various forms and listings, including Program of Studies, which document the early registration, regular registration, and late registration of students. These are non-record source documents. Information of continuing value is located in the Student Grade Verification books and in the Student Permanent Record Cards. Official enrollment data is maintained in the office of Institutional Research and Analysis.

RETENTION: Two years

Office: One year.

Archives: One year and destroy

8. STUDENT FINANCIAL AID FOLDERS/RK, 1967 -

Record of all financial aid received by individual students, including application form, parent's (or student's) confidential form, financial need analysis report, award letter, reply sheet, and any miscellaneous supporting documents.

RETENTION: Retain six years after the close of the fiscal year in which the expenditure was made or for that period of time required by federal and state records retention regulations, whichever is longer.

Office: Retain for two years after student ceases to receive aid

Archives: For total retention period and destroy

RECORDS RETENTION SCHEDULE NUMBER 36

CAMPUS: ROCKVILLE

OFFICE: STUDENT SERVICES

| Item No. | Description and Retention |
|----------|---|
| 9. | <p><u>STUDENT FINANCIAL AID HISTORY/RK, 1969 -</u> Periodic listing of basic information relating to aid provided to all students, including names, social security numbers, test scores, financial need, amount awarded, and program. Only the end of the academic year run is retained.</p> <p>RETENTION: Permanent Office: Retain until no longer required for immediate reference, then deposit in Archives. Archives: Permanent</p> |
| 0. | <p><u>STUDENT DEFERRED PAYMENTS RECORDS/RK, 1968 -</u> Application-agreements signed by students requesting the opportunity of making deferred tuition payments.</p> <p>RETENTION: Four years or until audited, whichever is longer Office: One year Archives: Three years and destroy</p> |
| 1. | <p><u>STUDENT MEDICAL RECORDS/RK, 1969 -</u> Records of physical examinations given at admission, examinations given to athletes, accident reports, and miscellaneous items.</p> <p>RETENTION: Three years Office: Three years and destroy</p> |
| 2. | <p><u>STUDENT-FACULTY DISCIPLINARY BOARDS/RK, 1970 -</u> Correspondence and miscellaneous papers recording the proceedings and actions of periodically convened disciplinary boards.</p> <p>RETENTION: Ten years Office: Ten years and destroy</p> |

| CAMPUS: ROCKVILLE | | OFFICE: STUDENT SERVICES |
|-------------------|--|--------------------------|
| Item No. | Description and Retention | |
| 13. | <p><u>STUDENT ACTIVITIES CONTRACTS, c.1967 -</u> Contracts between the College and entertainers or others who are employed by the student program council at the Rockville Campus.</p> <p>RETENTION: Six years Office: Six years and destroy; office of record</p> | |
| 14. | <p><u>STUDENT GOVERNMENT RECORDS/RK, 1967 -</u> Minutes of the proceedings of the Rockville Student Association, the Student Senate, and any related records.</p> <p>RETENTION: Permanent Office: Two years; office of record. Archives: Permanent</p> | |
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RECORDS RETENTION SCHEDULE NUMBER 37

| Item No. | Description and Retention |
|--------------------------|---|
| CAMPUS: ROCKVILLE CAMPUS | OFFICE: CAMPUS CENTER (DIRECTOR'S OFFICE) |
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1969 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Director of the Campus Center and Services.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value to be retained until such value ends or deposited in the Archives for permanent retention.</p> |
| 2. | <p><u>CAMPUS CENTER FINANCIAL RECORDS, 1969 -</u> Cash reports, cash register detail tapes, and other non-duplicate financial records documenting the financial operations of the various auxilliary enterprises under the supervision of the Director of the Campus Center and Services.</p> <p>RETENTION: Six years or until audited, whichever is longer. Office: One year Archives: Five years and destroy</p> |
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RECORDS RETENTION SCHEDULE NUMBER 38

CAMPUS: ROCKVILLE CAMPUS

OFFICE: BOOKSTORE

| Item No. | Description and Retention |
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| 1. | <p><u>BOOKSTORE FINANCIAL RECORDS /RK, 1965 -</u> Records documenting the operations of the Campus bookstore, including the following: cash register reports; cash receipts; inventories; cash register tapes; bookstore purchase orders, including supporting requisitions, invoices, and related materials; book returns records, including request forms, freight bills, and credit memoranda; students' charge records, including letter of authorization, copy of bill for books and supplies received, and copy of cash receipt received after payment made to the Cashier.</p> <p>RETENTION: (a) Retain bookstore purchase orders and supporting documents for four years or until audited, whichever is longer (b) Retain all other records for six years or until audited, whichever is longer.</p> <p>Office: Two years Archives: (a) Two years and destroy (b) Four years and destroy</p> |

CAMPUS: ROCKVILLE CAMPUS

OFFICE: FOOD SERVICES

Item
No.

Description and Retention

1. CAFETERIA FINANCIAL RECORDS/RK, 1965 -
Records documenting the operations of the Campus cafeteria, including the following: income record of receipts; cash register reports; inventories; purchase forms listing payments to vendors; invoices from vendors; cash register tapes; request forms for cafeteria services and related reports.
- RETENTION: Six years or until audited, whichever is longer
Office: One year
Archives: Five years and destroy

| CAMPUS: ROCKVILLE CAMPUS | OFFICE: RECREATIONAL SERVICES |
|--------------------------|---|
| FORM NO. | Description and Retention |
| 1. | <p><u>MONTGOMERY LANES FINANCIAL RECORDS/RK, 1969 -</u> Records documenting the operations of the bowling lanes and recreational areas, including the following: report of receipts; cash register reports; cash receipts; cash register tapes; copies of receipts given to bowling leagues for payment; manager's control sheets; physical education sheets; bowling sheets; billiard cards; inventories; accounting ledger summarizing income and expenditures.</p> <p>RETENTION: Six years or until audited, whichever is longer. Office: One year Archives: Five years and destroy</p> |
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GERMANTOWN CAMPUS

| CAMPUS: GERMANTOWN | OFFICE: CAMPUS DEAN |
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| Item No. | Description and Retention |
| 1. | <p><u>GENERAL CORRESPONDENCE AND OFFICE FILES, 1973 -</u> Correspondence, memoranda, and miscellaneous subject files relating to the activities of the office of the Campus Dean, Germantown Campus.</p> <p>RETENTION: Three years Office: May be destroyed after three years. Material having continuing administrative, legal, or historical value, including records documenting the educational and physical planning of the Campus, to be deposited in the Archives for permanent retention when no longer required for immediate reference.</p> |
| 2. | <p><u>FACULTY PERSONNEL FOLDERS /GR, 1973 -</u> Materials collected at time of employment, including application form and letters of recommendation, copies of salary action authorizations, evaluation materials, and other papers relating to the individual's full-time or part-time employment with the College.</p> <p>RETENTION: Twenty years after termination of employment Office: Retain while active and for two years after termination of employment. Permanent personnel records retained by the Finance office.</p> <p>Archives: Eighteen years and destroy</p> |
| 3. | <p><u>ANNUAL REPORTS /GR, 1973 -</u> Annual reports of academic departments and administrative offices on the Germantown Campus.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> |
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| Item No. | Description and Retention |
|--------------------|--|
| CAMPUS: GERMANTOWN | OFFICE: CAMPUS DEAN |
| 4. | <p><u>FACULTY LEAVE REPORTS/GR, 1973 -</u> Original leave reports signed by Campus faculty when leave is taken. These records support the bi-weekly report forwarded to the Payroll office.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> |
| 5. | <p><u>ADMINISTRATORS' LEAVE REPORTS/GR, 1973 -</u> Original leave reports signed by Campus administrators when leave is taken. These records support the bi-weekly report forwarded to the Payroll office.</p> <p>RETENTION: Permanent Office: Two years Archives: Permanent</p> |
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