

**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
RECORDS RETENTION AND DISPOSAL SCHEDULE**

Schedule No. C1297

Page 1 of 2

Agency
County Commissioners of Calvert County, MD


Division/Unit
Community Resources

Item No.	Description	Retention
	<p>“The issuance of a legal hold by the County Attorney’s Office overrides any portion of this record retention policy or schedule that otherwise calls for the disposal, transfer, or destruction of records subject to the hold, until the hold has been released by the County Attorney’s Office. No record that is subject to a legal hold may be altered, disposed of, transferred, or destroyed, even if the scheduled destruction date has passed. Any person preparing to alter, dispose of, transfer, or destroy a record must ascertain whether a litigation hold applies to the record before doing so.”</p>	
1	<p>Community Development Block Grant (CDBG) Documents</p> <p>All original documentation required to comply with CDBG grant requirements</p>	<p>Retain for 5 years from the date of the Dept. of Housing & Community Development closeout letter, then destroy.</p>
2	<p>Division Policies & Procedures Manuals</p> <p>Policies and Procedure Manuals in pdf format for each Community Resources division.</p>	<p>Retain until superseded, then destroy.</p>

Schedule Approved by Department, Agency, or Division Representative.

Date

Signature



Typed Name Maureen T. Hoffman

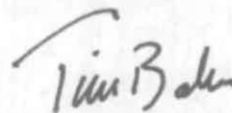
Title Director, Community Resources

Schedule Authorized by State Archivist

Date

6.8.16

Signature



**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
RECORDS RETENTION AND DISPOSAL SCHEDULE
(Continuation Sheet)**

Schedule No. C1297

Page 2 of 2

Agency	Division/Unit	
County Commissioners of Calvert County, MD	Community Resources	
Item No.	Description	Retention
3	<p>Correspondence</p> <p>General correspondence to public, Board of County Commissioners of Calvert County (BOCC) and Calvert County Government departments.</p>	Retain 3 years, then destroy.
4	<p>Electronic Records(E-mail)</p> <p>Correspondence or memoranda related to official business, documents that initiate, authorize or complete business transactions, drafts of documents circulated for comment or approval, final reports or recommendations created by Community Resources staff members.</p>	Screen bi-annually, deleting any items no longer needed for current business with the following exception: Transfer to the Maryland State Archives for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, legal or historical value.
5	Vacant-Series was merged with related material	
6	Vacant-Series was merged with related material	
7	<p>Budget/Fiscal Records</p> <p>Documents the expenditure of funds, accounting for finds, routine purchases and other activities of an accounting or financial nature; records not otherwise listed on this schedule. This includes, but not limited to, yearly budgets, requisition requests, invoices and check request vouchers.</p>	Retain 5 years after end of fiscal year, then destroy.

Instructions -Type or Print a separate form for each new or revised record series. Forward with Records Retention Schedule (DGS 550-1)		DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 Waterloo Road, P.O. Box 275 Jessup, Maryland 20794 410-799-1930		AGENCY RECORDS INVENTORY PAGE <u>1</u> OF <u>95</u>	
1. Department/Agency County Commissioners of Calvert County		2. Division Community Resources		3. Unit	
DEFINITION: RECORD SERIES: A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.					
4. Record Series Title Community Development Block Grant Documents				5. Earliest Year/Latest Year 2000 to 2015	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) All original documentation required to comply with CDBG grant requirements.					
7. Record Series Format(s) List all <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Audio Tape <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Bound Book <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		8. Record Series Sequence <input type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input checked="" type="checkbox"/> Other (specify) by grant number		9. Volume <u>2 file boxes</u> Number <input type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input checked="" type="checkbox"/> Other (specify) bankers boxes 10. Annual Accumulation <u>1 file boxes</u> Number <input type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input checked="" type="checkbox"/> Other (specify) banker box	
11. File is Used <input type="checkbox"/> Daily <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Annually			12. File Becomes Inactive After <u>5</u> Number <input type="checkbox"/> Month(s) <input checked="" type="checkbox"/> Year(s) from the "date of the closeout of the state's grant with Housing and Urban Development (HUD)"		
13. Current Location(s) (Bldg., Floor, Room) Community Resources Bldg, CR Office, CR Specialist Office			14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
15. Access Restrictions (If Yes, cite Law(s) & Regulation(s)) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Access restricted to appropriate CR administrative staff.			16. Audit Requirements <input type="checkbox"/> None <input checked="" type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent MD Department of Housing and Community Development		
17. Is an Index System used? If yes, explain briefly and describe requirements <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			18. Recommended Retention Retain permanently: <u>5 years from closeout letter</u>		
19. Name and Title of Preparer Maureen Hoffman, Community Resources Director		20. Telephone Number 410-535-1600 x 8801		21. Date September 1, 2014	

INSTRUCTIONS – TYPE OR PRINT A SEPARATE FORM FOR EACH NEW/REVISED ELECTRONIC RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1) COMAR 14.18.04		DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD, P.O. BOX 275 JESSUP, MARYLAND 20794 (410) 799-1930		ELECTRONIC RECORDS INVENTORY Page <u>2</u> of <u>45</u>	
1 DEPARTMENT/AGENCY County Commissioners of Calvert County		2 DIVISION Community Resources		3 UNIT	
DEFINITION – Record Series - A group of related records stored electronically and used as a unit for reference as well as retention and disposition purposes					
4 ELECTRONIC RECORD SERIES TITLE Division Policies & Procedures Manuals				5 EARLIEST YEAR/LATEST YEAR 2013-Present	
6 INPUT - Identify source of information to be entered Division Chiefs			7 OUTPUT - Identify the use/s of information generated by system Directions for routine division processes and tasks.		
8 ELECTRONIC RECORD SERIES DESCRIPTION - Briefly describe the information/documents/forms contained in a series. Include purpose and function of the system. Policies & Procedures Manuals in pdf format for each Community Resources division: Office on Aging, Transportation, Calvert Alliance Against Substance Abuse, Calvert County Family Network.					
9 POLICY ON ACCESS AND USE – Explain or attach copy if established in writing. Used to assist with routine training, and carrying out routine processes and tasks.					
10 UPDATING CYCLES OR CONDITIONS AND RULES FOR REVISING INFORMATION IN THE SYSTEM Reviewed and updated annually.					
11 SPECIFY THE LOCATION AND MEDIA OF THE MAIN ELECTRONIC DATA FILE. Explain the progression established to ensure the record's retention and usability throughout the record's authorized life cycle. Stored and accessed on share ("S") drive by Calvert County Government employees in accordance with directive from County Administrator.					
12 RECOMMENDED RETENTION Retain until superseded.					
13 TYPED OR PRINTED NAME OF PREPARER Lorraine Joyner		14 TELEPHONE NUMBER 410-535-1600 x 8803		15 DATE September 1, 2014	
16 TITLE OF PREPARER Community Resources Executive Administrative Assistant					
DGS 550-6					

Instructions -Type or Print a separate form for each new or revised record series. Forward with Records Retention Schedule (DGS 550-1)		DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 Waterloo Road, P.O. Box 275 Jessup, Maryland 20794 410-799-1930		AGENCY RECORDS INVENTORY PAGE <u>3</u> OF <u>95</u>	
1. Department/Agency County Commissioners of Calvert County		2. Division Community Resources		3. Unit	
DEFINITION: RECORD SERIES: A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.					
4. Record Series Title CR Correspondence			5. Earliest Year/Latest Year 2000 to 2014		
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) General Correspondence to public, Board of County Commissioners, Calvert County Government departments					
7. Record Series Format(s) List all <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Audio Tape <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Bound Book <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		8. Record Series Sequence <input type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input checked="" type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____		9. Volume <u>60</u> Number <input checked="" type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) _____ 10. Annual Accumulation <u>1 file folders</u> Number <input checked="" type="checkbox"/> File Drawer(s) <input type="checkbox"/> Microfilm Reel(s) <input type="checkbox"/> Computer Tape(s) <input type="checkbox"/> Other (specify) _____	
11. File is Used <input checked="" type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Annually			12. File Becomes Inactive After <u>3</u> Number <input type="checkbox"/> Month(s) <input checked="" type="checkbox"/> Year(s)		
13. Current Location(s) (Bldg., Floor, Room) Community Resources Building, Community Resources, Suite 102			14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
15. Access Restrictions (If Yes, cite Law(s) & Regulation(s)) <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Access restricted to appropriate administrative staff.			16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent		
17. Is an Index System used? If yes, explain briefly and describe requirements <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			18. Recommended Retention Retain 3 years then destroy.		
19. Name and Title of Preparer Lorraine Joyner, Executive Administrative Assistant		20. Telephone Number 410-535-1600 x 8803		21. Date September 1, 2014	

INSTRUCTIONS – TYPE OR PRINT A SEPARATE FORM FOR EACH NEW/REVISED ELECTRONIC RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (DGS 550-1) COMAR 14.18.04		DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 WATERLOO ROAD, P.O. BOX 275 JESSUP, MARYLAND 20794 (410) 799-1930		ELECTRONIC RECORDS INVENTORY Page <u>4</u> of <u>95</u>	
1 DEPARTMENT/AGENCY County Commissioners of Calvert County, MD		2 DIVISION Community Resources		3 UNIT N/A	
DEFINITION – Record Series - A group of related records stored electronically and used as a unit for reference as well as retention and disposition purposes					
4 ELECTRONIC RECORD SERIES TITLE Electronic Records				5 EARLIEST YEAR/LATEST YEAR ?????? TO Present	
6 INPUT - Identify source of information to be entered e-mail of employees			7 OUTPUT - Identify the use/s of information generated by system Electronic mail		
8 ELECTRONIC RECORD SERIES DESCRIPTION - Briefly describe the information/documents/forms contained in a series. Include purpose and function of the system. Correspondence or memoranda related to official business, documents that initiate, authorize or complete business transactions, drafts of documents circulated for comment or approval, final reports or recommendations created by CR staff members.					
9 POLICY ON ACCESS AND USE – Explain or attach copy if established in writing. Only the owner of the e-mail account has access to the account.					
10 UPDATING CYCLES OR CONDITIONS AND RULES FOR REVISING INFORMATION IN THE SYSTEM Maintain for 3 years unless administratively useful then delete.					
11 SPECIFY THE LOCATION AND MEDIA OF THE MAIN ELECTRONIC DATA FILE. Explain the progression established to ensure the record's retention and usability throughout the record's authorized life cycle. e-mail account					
12 RECOMMENDED RETENTION Maintain for 3 years unless administratively useful. <i>Screen bi-annually</i>					
13 TYPED OR PRINTED NAME OF PREPARER Lorraine Joyner		14 TELEPHONE NUMBER 410-535-1600 x8803		15 DATE 11/5/2014	
16 TITLE OF PREPARER Executive Administrative Assistant, Community Resources					
DGS 550-6					

<p>Instructions -Type or Print a separate form for each new or revised record series. Forward with Records Retention Schedule (DGS 550-1)</p>	<p>DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION 7275 Waterloo Road, P.O. Box 275 Jessup, Maryland 20794 410-799-1930</p>	<p>AGENCY RECORDS INVENTORY</p> <p>PAGE <u>5</u> OF <u>5</u></p>
<p>1. Department/Agency County Commissioners of Calvert County, MD</p>	<p>2. Division Community Resources</p>	<p>3. Unit</p>
<p>DEFINITION: RECORD SERIES: A group of related records normally filed and used as a unit for reference as well as retention and disposition purposes.</p>		
<p>4. Record Series Title Budget/Fiscal Records</p>	<p>5. Earliest Year/Latest Year 2008 to present</p>	
<p>6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Documents the expenditure of funds, accounting for finds, routine purchases and other activities of an accounting or financial nature; records not otherwise listed on this schedule. This includes, but not limited to, yearly budgets, requisition requests, invoices and check request vouchers.</p>		
<p>7. Record Series Format(s) List all</p> <p><input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm</p> <p><input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape</p> <p><input type="checkbox"/> Audio Tape <input type="checkbox"/> Floppy Disk</p> <p><input type="checkbox"/> Bound Book <input type="checkbox"/> Video Tape</p> <p><input type="checkbox"/> Other (specify) _____</p>	<p>8. Record Series Sequence</p> <p><input type="checkbox"/> Alphabetical</p> <p><input checked="" type="checkbox"/> Numerical</p> <p><input type="checkbox"/> Chronological</p> <p><input type="checkbox"/> Geographical</p> <p><input type="checkbox"/> Other (specify) _____</p>	<p>9. Volume ____ 1/2 ____ Number</p> <p><input checked="" type="checkbox"/> File Drawer(s)</p> <p><input type="checkbox"/> Microfilm Reel(s)</p> <p><input type="checkbox"/> Computer Tape(s)</p> <p><input type="checkbox"/> Other (specify) _____</p> <hr/> <p>10. Annual Accumulation ____ 1 ____ Number</p> <p><input type="checkbox"/> File Drawer(s)</p> <p><input type="checkbox"/> Microfilm Reel(s)</p> <p><input type="checkbox"/> Computer Tape(s)</p> <p><input checked="" type="checkbox"/> Other (specify) File _____</p>
<p>11. File is Used</p> <p><input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input checked="" type="checkbox"/> Monthly <input type="checkbox"/> Annually</p>	<p>12. File Becomes Inactive After End of fiscal year Number <input type="checkbox"/> Month(s) <input type="checkbox"/> Year(s)</p>	
<p>13. Current Location(s) (Bldg., Floor, Room) County Attorney's office</p>	<p>14. Is Record Series Duplicated Elsewhere? (If yes, specify agency or office.) <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Finance and Budget</p>	
<p>15. Access Restrictions (If Yes, cite Law(s) & Regulation(s)) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	<p>16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent</p>	
<p>17. Is an Index System used? If yes, explain briefly and describe requirements <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	<p>18. Recommended Retention Retain 5 year after end of fiscal year, and then destroy.</p>	
<p>19. Name and Title of Preparer Lorraine Joyner, Executive Administrative Assistant</p>	<p>20. Telephone Number 410-535-1600 x 8803</p>	<p>21. Date November 5, 2014</p>