

CHARLES COUNTY GOVERNMENT
 RECORDS MANAGEMENT DIVISION
 RECORDS RETENTION AND DISPOSAL SCHEDULE

Schedule No.

C1435

Page 1 of 2

Agency
 Charles County Government

Division/Unit
 Economic Development

Item No.	Description	Retention
1	GENERAL CORRESPONDENCE Subject arrangement of original incoming letters, outgoing letters, memorandum, and any and all correspondence of the Economic Development office.	Retain 1 year. Then screen annually and destroy materials having no further administrative, fiscal, or operational value. Retain permanently all materials that serves to document the origin, development, and accomplishments of the department. Transfer permanent material every 5 years to the State Archives.
2	TIME AND ATTENDENCE Files may contain some or all of the following: leave requests, comptime requests, weekly timesheets, etc.	Retain for 3 years and then destroy.
3	EMPLOYEE PERSONNEL RECORDS Files may contain some or all of the following: evaluations, awards, trainings, written correspondence, etc.	Retain for 1 year after date of separation and then destroy.
4	FISCAL YEAR BUDGETS Budget expenditure for department, tracking of expenses, invoices, purchase orders and check requests, etc.	Retain for 3 years and then destroy.
5	MAIL LOGS Log of all incoming mail addressed to the Economic Development Department.	Retain for 5 years and then destroy.
6	CREDIT CARD STATEMENTS Bank Of America statements for the Director and Deputy Director's credit card.	Retain for 3 years and then destroy.
7	FREEDOM OF INFORMATION ACT (FOIA) REQUESTS Files may contain written requests and responses to FOIA requests.	Retain for 3 years and then destroy.

Schedule Approved by Department, Agency, or Division Representative

Date 10-25-18
 Signature *[Signature]*
 Typed Name Michael D. Malliosff
 Title County Administrator

Schedule Authorized by State Archivist

Date 3-7-19
 Signature *[Signature]*

CHARLES COUNTY GOVERNMENT
 RECORDS MANAGEMENT DIVISION
 RECORDS RETENTION AND DISPOSAL SCHEDULE
 (Continuation Sheet)

Schedule No.

C1435

Page 2 of 2

Agency
 Charles County Government

Item No.	Description	Retention
8	COLLECTIONS / LOAN FUND FILES Files may contain some or all of the following: correspondence, complaints, payment, agreements, repayment agreement, corporation documents, background checks, legal documents, financial statements, etc.	Retain for 5 years after final payment on account has been made and then destroy.
9	SMALL LOCAL BUSINESS ENTERPRISE (SLBE) / MINORITY BUSINESS ENTERPRISE (MBE) FILES SLBE program supports the growth and economic vitality of Charles County small businesses. This program allows small local businesses to receive preference when competing for Charles County procurement opportunities. MBE program promotes the growth of minority-owned businesses, and increase their participation in the county's procurement process.	Retain for the life of the business or until business closes, whichever is later, and then destroy.
10	ECONOMIC DEVELOPMENT DEPARTMENT ZONING TEXT AMENDMENT STAFF OPINION LETTERS / MEMOS FILES Official request letter, supporting documentation, staff recommendation memo.	Retain for 3 years and then destroy.
11	COUNTY ATTORNEY FILES Files that require review of contracts and Human Resources personnel matters.	Retain for 3 years and then destroy.
12	LEGISLATIVE FILES Work files that contain supportive State & Local legislative initiatives and process.	Retain for 3 years and then destroy.
13	BUSINESS DEVELOPMENT / JOB CREATION FILES Work files that contain State and Local Incentives, (i.e. job credits)	Retain throughout the period that a company is eligible to receive credits and retain for 10 years after company has collected final credit, then destroy.
14	EDD GRANT REQUEST FILE Files may include some or all of the following: application, award letter, supporting documentation, report, etc.	Retain for 3 years and then destroy.
15	ECONOMIC DEVELOPMENT AGREEMENT / PUBLIC PRIVATE PARTNERSHIP FILES Files may include some or all of the following: agreements, correspondence, letters, etc.	Retain for life of project and then transfer to Archives.
16	ELECTRONIC FISCAL YEAR BUDGET TRACKING Budget expenditure for department, tracking of expenses, and check requests.	Retain for 5 years and then destroy.

Instructions -- Type or print a separate form for each new or revised record series.		AGENCY RECORDS INVENTORY													
		Page <u>1</u> of <u>16</u>													
1. Department/Agency Charles County Government	2. Division Economic Development	3. Unit/Program													
DEFINITION: Record Series: a group of related records normally filed and used as a unit for reference as well as retention & disposition purposes.															
4. Record Series Title GENERAL CORRESPONDENCE		5. Earliest Year <u>2012</u> / Latest Year <u>2018</u> to													
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Subject arrangement of original incoming letters, outgoing letters, memorandum, and any and all correspondence of the Economic Development office.															
7. Record Series Format(s)		8. Record Series Sequence													
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13. Current Location(s) (Building, Floor, Room) 10665 Stanhaven Place, Sulte 206 White Plains, MD 20695		14. Is record series duplicated elsewhere? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, specify agency or office)													
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19. Name and Title of Preparer Lacey Oliver Administrative Associate	20. Telephone Number 301-885-1340	21. Date 10/12/2018													

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DEFINITION: Record Series: a group of related records normally filed and used as a unit for reference as well as retention & disposition purposes.			
4. Record Series Title MAIL LOGS		5. Earliest Year <u>2012</u> / Latest Year <u>2018</u> to	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Log of all incoming mail addressed to the Economic Development Department.			
7. Record Series Format(s)		8. Record Series Sequence	
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15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite law(s) and regulation(s))		16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent County													
17. Is an index system used? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, explain briefly and describe any hardware/software)		18. Recommended retention Retain for 3 years and then destroy.													
19. Name and Title of Preparer Lacey Oliver Administrative Associate	20. Telephone Number 301-885-1340	21. Date 10/12/2018													

Instructions -- Type or print a separate form for each new or revised record series.		AGENCY RECORDS INVENTORY													
		Page <u>8</u> of <u>16</u>													
1. Department/Agency Charles County Government	2. Division Economic Development	3. Unit/Program													
DEFINITION: Record Series: a group of related records normally filed and used as a unit for reference as well as retention & disposition purposes.															
4. Record Series Title COLLECTIONS / LOAN FUND FILES		5. Earliest Year <u>2013</u> / Latest Year <u>2018</u> to													
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Files may contain some or all of the following: correspondence, complaints, payment, agreements, repayment agreement, corporation documents, background checks, legal documents, financial statements, etc.															
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		8. Record Series Sequence <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____													
		9. Volume <table border="1" style="width: 100%;"><tr><td style="width: 50px; text-align: center;">3</td><td>File Drawer(s)</td><td style="text-align: right;">Number</td></tr><tr><td> </td><td>Microfilm Reel(s)</td><td> </td></tr><tr><td> </td><td>Computer Tape(s)</td><td> </td></tr><tr><td> </td><td>Other (specify)</td><td> </td></tr></table>		3	File Drawer(s)	Number		Microfilm Reel(s)			Computer Tape(s)			Other (specify)	
3	File Drawer(s)	Number													
	Microfilm Reel(s)														
	Computer Tape(s)														
	Other (specify)														
		10. Annual Accumulation <table border="1" style="width: 100%;"><tr><td style="width: 50px; text-align: center;">3</td><td>File Drawer(s)</td><td style="text-align: right;">Number</td></tr><tr><td> </td><td>Microfilm Reel(s)</td><td> </td></tr><tr><td> </td><td>Computer Tape(s)</td><td> </td></tr><tr><td> </td><td>Other (specify)</td><td> </td></tr></table>		3	File Drawer(s)	Number		Microfilm Reel(s)			Computer Tape(s)			Other (specify)	
3	File Drawer(s)	Number													
	Microfilm Reel(s)														
	Computer Tape(s)														
	Other (specify)														
11. File is used: <input type="checkbox"/> Daily <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Monthly		12. File becomes inactive after _____ Month(s) <u>6</u> Year(s)													
13. Current Location(s) (Building, Floor, Room) 10665 Stanhaven Place, Suite 206 White Plains, MD 20695		14. Is record series duplicated elsewhere? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (If yes, specify agency or office) Shared Drive													
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite law(s) and regulation(s))		16. Audit Requirements <input type="checkbox"/> State <input type="checkbox"/> Federal <input checked="" type="checkbox"/> None <input type="checkbox"/> Independent County													
17. Is an index system used? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, explain briefly and describe any hardware/software)		18. Recommended retention Retain for 5 years after final payment on account has been made and then destroy.													
19. Name and Title of Preparer Lacey Oliver Administrative Associate	20. Telephone Number 301-885-1340	21. Date 10/12/2018													

Instructions -- Type or print a separate form for each new or revised record series.		AGENCY RECORDS INVENTORY	
		Page <u>9</u> of <u>16</u>	
1. Department/Agency Charles County Government	2. Division Economic Development	3. Unit/Program	
DEFINITION: Record Series: a group of related records normally filed and used as a unit for reference as well as retention & disposition purposes.			
4. Record Series Title SMALL LOCAL BUSINESS ENTERPRISE (SLBE) / MINORITY BUSINESS ENTERPRISE (MBE) FILES		5. Earliest Year <u>2013</u> / Latest Year <u>2018</u>	
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) The SLBE program helps small and local businesses work through the challenges they face when trying to win government contracts by offering procurement incentives. The SLBE also supports the growth and economic vitality of Charles County small businesses by increasing their success when participating in county contracts and other procurement. The MBE program promotes the growth of minority-owned businesses, and increase their participation in the county's procurement processes. Files may contain some or all of the following: correspondence, application, income tax form, Internal Revenue Service documents, state assessment forms, etc.			
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		8. Record Series Sequence <input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____	
		9. Volume Number _____ <input type="text" value="4"/> File Drawer(s) <input type="text"/> Microfilm Reel(s) <input type="text"/> Computer Tape(s) <input type="text"/> Other (specify)	
		10. Annual Accumulation Number _____ <input type="text" value="4"/> File Drawer(s) <input type="text"/> Microfilm Reel(s) <input type="text"/> Computer Tape(s) <input type="text"/> Other (specify)	
File is used: <input type="checkbox"/> Daily <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Monthly		12. File becomes inactive after _____ Month(s) Retain for the life of the business _____ Year(s)	
13. Current Location(s) (Building, Floor, Room) 10665 Stanhaven Place, Suite 206 White Plains, MD 20695		14. Is record series duplicated elsewhere? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (If yes, specify agency or office) _____ Series	
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite law(s) and regulation(s))		16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent County	
17. Is an index system used? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, explain briefly and describe any hardware/software)		18. Recommended retention Retain for the life of the business until business becomes desolve and then destroy.	
19. Name and Title of Preparer Lacey Oliver Administrative Associate	20. Telephone Number 301-885-1340	21. Date 10/12/2018	

Instructions – Type or print a separate form for each new or revised record series.		AGENCY RECORDS INVENTORY									
		Page <u>10</u> of <u>16</u>									
1. Department/Agency Charles County Government	2. Division Economic Development	3. Unit/Program									
DEFINITION: Record Series: a group of related records normally filed and used as a unit for reference as well as retention & disposition purposes.											
4. Record Series Title ECONOMIC DEVELOPMENT DEPARTMENT ZONING TEXT AMENDMENT STAFF OPINION LETTERS / MEMOS FILES		5. Earliest Year <u>2006</u> / Latest Year <u>2018</u> to									
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) The Economic Development Department receives zoning text amendments on various projects which are of proprietary nature. The purpose of a zoning text amendment is to establish the regulatory framework and provide guidance to businesses affected by the zoning text amendment. Official request letter, supporting documentation, staff recommendation memo, etc.											
7. Record Series Format(s) <input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <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 Number <table border="1"><tr><td>1</td><td>File Drawer(s)</td></tr><tr><td></td><td>Microfilm Reel(s)</td></tr><tr><td></td><td>Computer Tape(s)</td></tr><tr><td></td><td>Other (specify)</td></tr></table>		1	File Drawer(s)		Microfilm Reel(s)		Computer Tape(s)		Other (specify)
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	Other (specify)										
		10. Annual Accumulation Number <table border="1"><tr><td>1</td><td>File Drawer(s)</td></tr><tr><td></td><td>Microfilm Reel(s)</td></tr><tr><td></td><td>Computer Tape(s)</td></tr><tr><td></td><td>Other (specify)</td></tr></table>		1	File Drawer(s)		Microfilm Reel(s)		Computer Tape(s)		Other (specify)
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	Microfilm Reel(s)										
	Computer Tape(s)										
	Other (specify)										
File is used: <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed		12. File becomes inactive after _____ Month(s) <u>3</u> Year(s)									
13. Current Location(s) (Building, Floor, Room) 10665 Stanhaven Place, Suite 206 White Plains, MD 20695		14. Is record series duplicated elsewhere? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, specify agency or office)									
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite law(s) and regulation(s))		16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent County									
17. Is an index system used? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, explain briefly and describe any hardware/software)		18. Recommended retention Retain for 3 years and then destroy.									
19. Name and Title of Preparer Lacey Oliver Administrative Associate	20. Telephone Number 301-885-1340	21. Date 10/12/2018									

Instructions -- Type or print a separate form for each new or revised record series.		AGENCY RECORDS INVENTORY													
		Page <u>11</u> of <u>16</u>													
1. Department/Agency Charles County Government	2. Division Economic Development	3. Unit/Program													
DEFINITION: Record Series: a group of related records normally filed and used as a unit for reference as well as retention & disposition purposes.															
4. Record Series Title COUNTY ATTORNEY FILES		5. Earliest Year <u>2012</u> / Latest Year <u>2018</u> to													
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Files that require review of contracts and Human Resources personnel matters.															
7. Record Series Format(s)		8. Record Series Sequence													
<input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		<input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____													
		9. Volume													
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	Computer Tape(s)														
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		10. Annual Accumulation													
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1	File Drawer(s)	Number													
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	Computer Tape(s)														
	Other (specify)														
11. File is used: <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed		12. File becomes inactive after _____ Month(s) <u>3</u> Year(s)													
13. Current Location(s) (Building, Floor, Room) 10665 Stanhaven Place, Suite 208 White Plains, MD 20695		14. Is record series duplicated elsewhere? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, specify agency or office)													
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite law(s) and regulation(s))		16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent County													
17. Is an index system used? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, explain briefly and describe any hardware/software)		18. Recommended retention Retain for 3 years and then destroy.													
19. Name and Title of Preparer Lacey Oliver Administrative Associate	20. Telephone Number 301-885-1340	21. Date 10/12/2018													

Instructions -- Type or print a separate form for each new or revised record series.		AGENCY RECORDS INVENTORY									
		Page <u>12</u> of <u>16</u>									
1. Department/Agency Charles County Government	2. Division Economic Development	3. Unit/Program									
DEFINITION: Record Series: a group of related records normally filed and used as a unit for reference as well as retention & disposition purposes.											
4. Record Series Title LEGISLATIVE FILES		5. Earliest Year <u>2012</u> / Latest Year <u>2018</u> to									
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Work files that contain supportive State & Local legislative initiatives and process.											
7. Record Series Format(s)		8. Record Series Sequence									
<input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		<input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____									
		9. Volume Number									
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	Computer Tape(s)										
	Other (specify)										
		10. Annual Accumulation Number									
		<table border="1" style="width: 100%;"> <tr><td style="text-align: center;">1</td><td>File Drawer(s)</td></tr> <tr><td> </td><td>Microfilm Reel(s)</td></tr> <tr><td> </td><td>Computer Tape(s)</td></tr> <tr><td> </td><td>Other (specify)</td></tr> </table>		1	File Drawer(s)		Microfilm Reel(s)		Computer Tape(s)		Other (specify)
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	Microfilm Reel(s)										
	Computer Tape(s)										
	Other (specify)										
11. File is used: <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed		12. File becomes inactive after _____ Month(s) <u>3</u> Year(s)									
13. Current Location(s) (Building, Floor, Room) 10665 Stanhaven Place, Suite 206 White Plains, MD 20695		14. Is record series duplicated elsewhere? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, specify agency or office)									
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite law(s) and regulation(s))		16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent County									
17. Is an index system used? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, explain briefly and describe any hardware/software)		18. Recommended retention Retain for 3 years and then destroy.									
19. Name and Title of Preparer Lacey Oliver Administrative Associate	20. Telephone Number 301-885-1340	21. Date 10/12/2018									

Instructions -- Type or print a separate form for each new or revised record series.		AGENCY RECORDS INVENTORY									
		Page <u>13</u> of <u>16</u>									
1. Department/Agency Charles County Government	2. Division Economic Development	3. Unit/Program									
DEFINITION: Record Series: a group of related records normally filed and used as a unit for reference as well as retention & disposition purposes.											
4. Record Series Title BUSINESS DEVELOPMENT / JOB CREATION FILES		5. Earliest Year <u>2012</u> / Latest Year <u>2018</u> to									
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) The purpose is to keep tract of the Economic Development Departments and its activity/work product as it relates to various businesses. Work files that contain State and Local Incentives, (i.e. job credits)											
7. Record Series Format(s)		8. Record Series Sequence									
<input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		<input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____									
		9. Volume Number									
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	Other (specify)										
		10. Annual Accumulation Number									
		<table border="1" style="width: 100%;"> <tr><td style="width: 50px; text-align: center;">2</td><td>File Drawer(s)</td></tr> <tr><td> </td><td>Microfilm Reel(s)</td></tr> <tr><td> </td><td>Computer Tape(s)</td></tr> <tr><td> </td><td>Other (specify)</td></tr> </table>		2	File Drawer(s)		Microfilm Reel(s)		Computer Tape(s)		Other (specify)
2	File Drawer(s)										
	Microfilm Reel(s)										
	Computer Tape(s)										
	Other (specify)										
File is used: <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed		12. File becomes inactive after _____ Month(s) <u>5-10</u> Year(s)									
13. Current Location(s) (Building, Floor, Room) 10665 Stanhaven Place, Suite 206 White Plains, MD 20695		14. Is record series duplicated elsewhere? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, specify agency or office)									
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite law(s) and regulation(s))		16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent County									
17. Is an index system used? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, explain briefly and describe any hardware/software)		18. Recommended retention Retain throughout the period that a company is eligible to receive credits and retain for 10 years after company has collected final credit.									
19. Name and Title of Preparer Lacey Oliver Administrative Associate	20. Telephone Number 301-885-1340	21. Date 10/12/2018									

Instructions -- Type or print a separate form for each new or revised record series.		AGENCY RECORDS INVENTORY													
		Page <u>14</u> of <u>16</u>													
1. Department/Agency Charles County Government	2. Division Economic Development	3. Unit/Program													
DEFINITION: Record Series: a group of related records normally filed and used as a unit for reference as well as retention & disposition purposes.															
4. Record Series Title ECONOMIC DEVELOPMENT DEPARTMENT GRANT REQUEST FILE		5. Earliest Year <u>2016</u> / Latest Year <u>2018</u>													
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) The purpose is to maintain and tract the departments grant requests over a three year period. This would apply to both the department requesting a grant and agencies requesting a grant from the Economic Development Department. Files may include some or all of the following: application, award letter, supporting documentation, report, etc.															
7. Record Series Format(s)		8. Record Series Sequence													
<input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		<input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____													
		9. Volume													
		<table border="1"> <tr><td style="width: 50px; text-align: center;">2</td><td>File Drawer(s)</td><td style="text-align: right;">Number</td></tr> <tr><td> </td><td>Microfilm Reel(s)</td><td> </td></tr> <tr><td> </td><td>Computer Tape(s)</td><td> </td></tr> <tr><td> </td><td>Other (specify)</td><td> </td></tr> </table>		2	File Drawer(s)	Number		Microfilm Reel(s)			Computer Tape(s)			Other (specify)	
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	Other (specify)														
		10. Annual Accumulation													
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2	File Drawer(s)	Number													
	Microfilm Reel(s)														
	Computer Tape(s)														
	Other (specify)														
File is used: <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> Quarterly		12. File becomes inactive after _____ Month(s) <u>3</u> Year(s)													
13. Current Location(s) (Building, Floor, Room) 10665 Stanhaven Place, Suite 206 White Plains, MD 20695		14. Is record series duplicated elsewhere? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, specify agency or office)													
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite law(s) and regulation(s))		16. Audit Requirements <input type="checkbox"/> State <input type="checkbox"/> Federal <input checked="" type="checkbox"/> None <input type="checkbox"/> Independent County													
17. Is an index system used? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, explain briefly and describe any hardware/software)		18. Recommended retention Retain for 3 years and then destroy.													
19. Name and Title of Preparer Lacey Oliver Administrative Associate	20. Telephone Number 301-885-1340	21. Date 10/12/2018													

Instructions -- Type or print a separate form for each new or revised record series.		AGENCY RECORDS INVENTORY									
		Page 15 of 16									
1. Department/Agency Charles County Government	2. Division Economic Development	3. Unit/Program									
DEFINITION: Record Series: a group of related records normally filed and used as a unit for reference as well as retention & disposition purposes.											
4. Record Series Title ECONOMIC DEVELOPMENT AGREEMENT / PUBLIC PRIVATE PARTNERSHIP FILES		5. Earliest Year 2012 / Latest Year to 2018									
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Files may include some or all of the following: agreements, correspondence, letters, etc.											
7. Record Series Format(s)		8. Record Series Sequence									
<input checked="" type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input checked="" type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input type="checkbox"/> Other (specify) _____		<input checked="" type="checkbox"/> Alphabetical <input type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify) _____									
		9. Volume 48 Number									
		<table border="1"> <tr><td>48</td><td>File Drawer(s)</td></tr> <tr><td>0</td><td>Microfilm Reel(s)</td></tr> <tr><td>0</td><td>Computer Tape(s)</td></tr> <tr><td>0</td><td>Other (specify)</td></tr> </table>		48	File Drawer(s)	0	Microfilm Reel(s)	0	Computer Tape(s)	0	Other (specify)
48	File Drawer(s)										
0	Microfilm Reel(s)										
0	Computer Tape(s)										
0	Other (specify)										
		10. Annual Accumulation Number									
		<table border="1"> <tr><td>48</td><td>File Drawer(s)</td></tr> <tr><td>0</td><td>Microfilm Reel(s)</td></tr> <tr><td>0</td><td>Computer Tape(s)</td></tr> <tr><td>0</td><td>Other (specify)</td></tr> </table>		48	File Drawer(s)	0	Microfilm Reel(s)	0	Computer Tape(s)	0	Other (specify)
48	File Drawer(s)										
0	Microfilm Reel(s)										
0	Computer Tape(s)										
0	Other (specify)										
File is used: <input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed		12. File becomes inactive after _____ Month(s) Retain for life of project _____ Year(s)									
13. Current Location(s) (Building, Floor, Room) 10665 Stanhaven Place, Suite 206 White Plains, MD 20695		14. Is record series duplicated elsewhere? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (If yes, specify agency or office) Shared Drive									
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite law(s) and regulation(s))		16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent County									
17. Is an index system used? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, explain briefly and describe any hardware/software)		18. Recommended retention Retain for life of project and then transfer to the Archives.									
19. Name and Title of Preparer Lacey Oliver Administrative Associate	20. Telephone Number 301-885-1340	21. Date 10/12/2018									

Instructions -- Type or print a separate form for each new or revised record series.		AGENCY RECORDS INVENTORY Page <u>16</u> of <u>16</u>									
1. Department/Agency Charles County Government	2. Division Economic Development	3. Unit/Program									
DEFINITION: Record Series: a group of related records normally filed and used as a unit for reference as well as retention & disposition purposes.											
4. Record Series Title ELECTRONIC FISCAL YEAR BUDGET TRACKING		5. Earliest Year / Latest Year <u>2012</u> / <u>2018</u>									
6. Record Series Description (Briefly describe the types of information/documents/forms found in the series. Include the purpose or function of the series.) Budget expenditure for department, tracking of expenses, and check requests.											
7. Record Series Format(s) <input type="checkbox"/> Letter Size <input type="checkbox"/> Microfilm <input type="checkbox"/> Legal Size <input type="checkbox"/> Computer Tape <input type="checkbox"/> Bound Book <input type="checkbox"/> Floppy Disk <input type="checkbox"/> Audio Tape <input type="checkbox"/> Video Tape <input checked="" type="checkbox"/> Other (specify) <u>Electronic</u>	8. Record Series Sequence <input type="checkbox"/> Alphabetical <input checked="" type="checkbox"/> Numerical <input type="checkbox"/> Chronological <input type="checkbox"/> Geographical <input type="checkbox"/> Other (specify)	9. Volume Number <table style="width: 100%; border-collapse: collapse;"> <tr><td style="border: 1px solid black; width: 50px; text-align: center;">3</td><td>File Drawer(s)</td></tr> <tr><td style="border: 1px solid black; width: 50px; text-align: center;"> </td><td>Microfilm Reel(s)</td></tr> <tr><td style="border: 1px solid black; width: 50px; text-align: center;"> </td><td>Computer Tape(s)</td></tr> <tr><td style="border: 1px solid black; width: 50px; text-align: center;">1</td><td>Other (specify)</td></tr> </table>		3	File Drawer(s)		Microfilm Reel(s)		Computer Tape(s)	1	Other (specify)
3	File Drawer(s)										
	Microfilm Reel(s)										
	Computer Tape(s)										
1	Other (specify)										
File is used: <input type="checkbox"/> Daily <input checked="" type="checkbox"/> Weekly		12. File becomes inactive after <u>5</u> Year(s)									
13. Current Location(s) 10665 Stanhaven Place, Suite 206 White Plains, MD 20695		14. Is record series duplicated elsewhere? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (If yes, specify agency or office) Office file cabinet									
15. Access Restrictions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, cite law(s) and regulation(s))		16. Audit Requirements <input checked="" type="checkbox"/> None <input type="checkbox"/> State <input type="checkbox"/> Federal <input type="checkbox"/> Independent County									
17. Is an index system used? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (If yes, explain briefly and describe any hardware/software)		18. Recommended retention Retain for 5 years and then destroy									
19. Name and Title of Preparer Lacey Oliver Administrative Associate	20. Telephone Number 301-885-1340	21. Date 10/12/2018									