

# General Schedule

<b>GenSch1</b>	Correspondence	
<b>GenSch1.1</b>	Correspondence - General	
<i>Records documenting routine communications received or sent which do not contain significant information about a department's programs. Includes electronic mail that communicates the above.</i>		Cut off at the end of the calendar year and retain two years.
<b>GenSch1.2</b>	Correspondence - Administrative	
<i>Records documenting communication received or sent which contain significant information about a department's programs. Includes electronic mail that communicates the above.</i>		Cut off at the end of the fiscal or calendar year and retain four years. Send to archives for historical review.
<b>GenSch1.3</b>	Correspondence - Transitory	
<i>Records documenting communications received or sent which do not contain significant information about a department's programs. File may include but is not limited to advertising circulars, drafts and worksheets, desk notes, memoranda, and other records of transitory information value. Includes electronic mail that communicates the above.</i>		Retain until no longer of administrative need.
<b>GenSch2</b>	Policies	
<b>GenSch2.1</b>	Policies - Work papers	
<i>All documentation relating to the drafting, approval and implementation of department policies.</i>		Retain until updated or superseded.
<b>GenSch2.2</b>	Policies - Published	
<i>Approved policy published and distributed by department.</i>		Retain until updated or superseded.
<b>GenSch3</b>	Publications	
<b>GenSch3.1</b>	Publications - Work papers	
<i>All documentation specific to the creation by a department of brochures, pamphlets, reports, fact sheets, leaflets, manuals, annual reports, newsletters or other published or processed documents.</i>		Retain until superseded or no longer of administrative need.
<b>GenSch3.2</b>	Publications - Published	
<i>All documentation specific to the creation by a department of brochures, pamphlets, reports, fact sheets, leaflets, manuals, annual reports, newsletters or other published or processed documents.</i>		Retain one copy permanently. Send to College Archives.
<b>GenSch4</b>	Financial Records	
<b>GenSch4.1</b>	Budget Work papers	

<p><i>All documentation created by a department for purposes of preparing budget requests for the coming year.</i></p> <p><b>GenSch4.2</b>            Employee Expense Reports</p> <p><i>Employee copy of expense reports submitted to Controller for reimbursement of business related expenses.</i></p> <p><b>GenSch4.3</b>            Check Requests</p> <p><i>Copies of check requests completed and submitted to Controller for processing payments to vendors for products or services.</i></p> <p><b>GenSch4.4</b>            Purchase Orders/Invoices</p> <p><i>Copies of purchase orders and/or invoices completed and submitted to Controller for processing payments to vendors for products or services.</i></p> <p><b>GenSch4.5</b>            W.B. Mason Orders</p> <p><i>All documentation relating to W.B. Mason orders, including but not limited to order confirmations, packing slips and monthly order summaries.</i></p> <p><b>GenSch4.6</b>            Work Study Students/Student Aid and Finance Records</p> <p><i>All documentation relating to a student's work in the department. File may include but is not limited to application, hiring forms, timecards, time logs and evaluations.</i></p> <p><b>GenSch4.7</b>            Petty Cash</p> <p><i>Documentation for petty cash paid/out reimbursement.</i></p> <p><b>GenSch4.8</b>            Corporate Credit Card Reconciliations</p> <p><i>Monthly reconciliations documenting purchases. Prior to FY07-08, monthly credit card statements were provided.</i></p> <p><b>GenSch5</b>                Human Resources Related Records</p> <p><b>GenSch5.1</b>            Personnel Records</p> <p><i>Department copy of an employee's personnel record.</i></p> <p><b>GenSch5.2</b>            Job Search Files</p> <p><i>Files relating to searches for open positions (administrative, staff and faculty). File may include but is not limited to applications, CVs/resumes, correspondence and interview records.</i></p> <p><b>GenSch6</b>                Grant Files</p>	<p>Cut off at the end of the fiscal year and retain two years.</p> <p>Cut off at the end of the fiscal year and retain one year.</p> <p>Cut off at the end of the fiscal year and retain one year.</p> <p>Cut off at the end of the fiscal year and retain one year.</p> <p>Cut off at the end of the fiscal year and retain one year.</p> <p>Cut off at the end of the fiscal year and retain one year.</p> <p>Retain two years form date student graduates or terminates employment.</p> <p>Cut off at the end of the fiscal year and retain one year.</p> <p>Cut off at the end of the fiscal year and retain one year.</p> <p>Office of Record is Human Resources. Transfer all original records to HR.</p> <p>Retain until search completed then discard. Note: Interviewed candidates may be retained longer, but not more than one year from date job filled.</p>
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<b>GenSch6.1</b>	Grant Files - Funded	<i>All documentation relating to application for and implementation of federal, state and private grants.</i>	Retain three years from date grant ends. Transfer original application, contracts, agreements and annual and final performance reports to archives for permanent retention.
<b>GenSch6.2</b>	Grant Files - Unfunded	<i>Applications and supporting documentation relating to federal, state and private grants which did not receive funding.</i>	Retain one year from date grant rejected.
<b>GenSch7</b>	Committees and Meetings		
<b>GenSch7.1</b>	Staff Meeting Records	<i>This series documents office or department staff meetings. Records include minutes, agendas, working papers, reports and related correspondence.</i>	Cut off at the end of the calendar year and retain for three years. Send to archives for final review and disposal.
<b>GenSch7.2</b>	Standing Committee Files	<i>All documentation relating to the activities of a standing committee. Records include but are not limited to committee establishment and charges, minutes, reports, membership lists, agendas, documents, attachments, clippings, arrangement and related documentation.</i>	Permanent: Establishment and charges, agendas, minutes, membership and reports. Archives Review: All other documentation.
<b>GenSch8</b>	Contracts	<i>All documentation related to a contract or agreement entered into by Stonehill College and another party. Records include but are not limited to negotiation issues, documentation, memos of understanding, agreements, contracts, amendments, scope of work, terms and conditions, billing and payment documentation and related correspondence.</i>	Retain seven years from the expiration of contract. General Counsel and archival review before disposition.
<b>GenSch9</b>	Reference Files	<i>Documents from outside sources collected and maintained for the use of staff. Materials may include but are not limited to reference manuals, books, bulletins, publications, articles, and information from websites.</i>	Retain until no longer of administrative value
<b>GenSch10</b>	Mailing Lists	<i>List of individuals, companies or other entities.</i>	Retain until superseded or no longer of administrative value.
<b>GenSch11</b>	Project Files	<i>All documentation relating to projects undertaken by departments which have a specific start and end date, but which do not represent an ongoing function/responsibility of the department.</i>	Retain two years from date project ends, then transfer to archives for historical review.
<b>GenSch12</b>	Special Event Files		

*All documentation relating to a department's involvement/participation with an on or off campus event.*

Retain two years from date project ends, then transfer to archives for historical review.

**GenSch13** Organizational Charts

*Organizational charts that show lines of authority and responsibility organization-wide and/or within and between the various departments and offices.*

Retain until updated or superseded and then transfer to archives.

**GenSch14** Reports

*Reports issued from departments on a variety of subject including but not limited to department activities. Status of projects, accomplishments and statistics.*

**GenSch14.1** Reports -Weekly

Cut off at the end of the calendar year and retain one year.

**GenSch14.2** Reports -Monthly

Cut off at the end of the calendar year and retain two years.

**GenSch14.3** Reports -Quarterly

Cut off at the end of the calendar year and retain two years.

**GenSch14.4** Reports - Annual

Permanent - Transfer to archives after two years or when no longer of administrative value.

**GenSch14.5** Statistical Reports

Retain three years, then transfer to Archives for historical review unless other retention noted in department's individual schedule.

**GenSch15** Professional Organization and Association Records

*Material related to staff or department's membership in a professional organization. File may include but is not limited to promotional literature, membership lists, meeting announcements, conference proceedings, programs and correspondence.*

Retain until no longer of administrative need.

**GenSch16** Speech Files

*Speeches and talks given by faculty, officers and other staff. Records include correspondence, memoranda, agendas, notes, audio visual materials and speech transcripts.*

Retain two years from date of speech and send to Archives for final review and disposition. Permanent: All speeches by President and Division Heads.

**GenSch17** Special Media

*This series provides for materials on special media relating to Stonehill subjects and which are not covered by other record series. Materials include but are not limited to photographs, audio-visual materials, maps, plans, blueprints, drawing, models, magnetic tapes, computer disks or files, and motion picture films.*

Retain until no longer of administrative need and then send to Archives for final review and disposition.

**GenSch18** Memorabilia

*This series consists of items, mementos, and souvenirs with special value to the department. Materials include scrapbooks, picture books, albums, news clippings, photographs, slides, films, buttons, flags, banners and badges.*

Retain until no longer of administrative need and then send to Archives for final review and disposition.

**GenSch19** Photographs

*Photographic proofs, negatives or digital files of department activities. Photographs should include identification of time, place, subject and/or department activity.*

Retain until no longer of administrative need and then send to Archives for final review and disposition.

**GenSch20** Artifacts

*This series consists of objects which have significant ceremonial, historical or symbolic value relating to the department's mission and functions. Objects may include but are not limited to include, maces, stamping devices, seals, art and awards.*

Retain until no longer of administrative need and then send to Archives for final review and disposition.

**GenSch21** Records Management

**GenSch21.1** Records Retention Schedules

*Approved records retention schedules.*

Departments - Retain until superseded. General Counsel's Office - Permanent.

**GenSch21.2** Records Destruction Forms

*Form completed by department listing records destroyed.*

Permanent in office.

**GenSch23** Surveys

*All documentation relating to surveys conducted by departments for various purposes.*

Retain data gathered in survey two years from date survey closed. Retain final survey Report permanently.