

University of Missouri Extension
Records Retention and Disposition Recommended Schedule

ITEM	RETENTION RECOMMENDATION	AFTER RETENTION TIME REACHED	RESPONSIBLE OFFICE
ADMINISTRATION			
1) Correspondence	Reference value, up to 5 years	Historical-archive. Otherwise, destroy	Originating Office
2) Policy and Procedure Handbook	Permanent	Previous versions-archive	V.P.'s Office & County Extension Office
3) Memorandums of Understanding	Permanent		Vice Provost's Office
ADMINISTRATIVE SERVICES			
1) Equipment Inventory			
a. Federal	Continuous		Administrative Management-Fiscal
b. University	Continuous		Administrative Management-Fiscal
c. County Extension Council	Continuous		County Extension Office
2) Leases			
a. University	1 year after end date	Destroy	Administrative Management-Fiscal
b. County Extension Council	1 year after end date	Destroy	County Extension Office
PROGRAM DEVELOPMENT & EVALUATION			
1) Plans of Work	Permanent		V.P.'s Office & Each Extension Office
2) Program Reports	3 years	Destroy	Originating Office
3) Program Evaluations	3 years	Destroy	Originating Office
4) 4-H Youth			
a. Enrollments	20 Years	Destroy	State 4-H and County Offices
b. Volunteer Leader Forms	5 years past active volunteer status	Destroy	Area Youth Specialist
c. ES-237 Reports	20 Years	Destroy	Program Director
d. Health Forms	5 years after last year in 4-H	Destroy	Area Youth Specialist
e. other documents--4-H council business (minutes, awards, civil rights, recognitions etc.	20 Years	Destroy	Area Youth Specialist/YPA (in county)
REGIONAL/COUNTY BUDGETS/FINANCE			
1) Accounting Records-non grant	5 years	Historical-archive. Otherwise, destroy	County Extension Office
2) Accounting Records-grant	3 years after final invoice or audit	Destroy	County Extension Office
3) Budget (outside of council minutes)	5 years	Destroy	County Extension Office
4) Council Audit Reports	Permanent		County Extension Office
5) Bank Statements	5 years	Destroy	County Extension Office
6) Cancelled Checks	5 years	Destroy	County Extension Office
7) Deposit Statements	5 years	Destroy	County Extension Office
8) Court Requisition (outside of council minutes)	5 years	Destroy	County Extension Office
9) Annual Summary Reports (outside of council minutes)	5 years	Destroy	County Extension Office
CIVIL RIGHTS			
1) County Affirmative Action Plan	Permanent	Previous versions-archive	County Extension Office
2) Regional Affirmative Action Plan	Permanent	Previous versions-archive	Regional Director's Office
3) State Affirmative Action Plan	Permanent	Previous versions-archive	Director Affirmative Action
4) Regional Compliance Reports	Permanent	Previous versions-archive	Director Affirmative Action
5) Civil Rights Audits	Permanent	Previous versions-archive	Director Affirmative Action
6) Civil Rights Compliance Review	Permanent	Previous versions-archive	Director Affirmative Action
7) Affirmative Action Resource Handbook	Permanent	Previous versions-archive	Dir. Affirmative Action & County Office
8) Organizational Compliance Statements	Permanent	Previous versions-archive	Director Affirmative Action
9) State Civil Rights Report	Permanent	Previous versions-archive	Director Affirmative Action
Item	Retention Recommendation	After Retention	Responsible Office
COUNTY EXTENSION COUNCIL			
1) Annual Meeting minutes (includes reports presented)	Permanent		County Extension Office
2) Annual Membership Report	5 years	Destroy	County Extension Office
3) Extension Council Election Materials	2 years	Destroy	County Extension Office
PERSONNEL			
1) Applications-not hired			

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a. Extension Council	3 years	Destroy	County Extension Office
b. University of Missouri	3 years	Destroy	Human Resources
2) Individual Personnel Records (includes hired applications)			
a. Council Staff	Permanent		County Extension Office
b. University of Missouri	Permanent		Human Resources
3) Vacation & Sick Leave			
a. University of Missouri	Continuous, 1 year after end of employment	Destroy	Human Resources
b. Council Paid Staff	Continuous, 1 year after end of employment	Destroy	County Extension Office
4) Payroll Records - Time Sheets			
a. County Paid Staff	5 years	Destroy	County Extension Office
b. University of Missouri	5 years	Destroy	Human Resources
5) Accident/Incident Reports	Permanent		Administrative Management-Fiscal
6) Retirement Records			
a. University of Missouri	Permanent		Human Resources
b. Federal	Permanent		Human Resources
c. County Extension Council Employees	Permanent		County Extension Office
7) Performance Evaluations			
a. Council Staff	3 years	Archive	County Extension Office
b. University of Missouri	3 years	Transfer to Archives	Human Resources
PUBLIC INFORMATION			
1) State Fair Farm Family	Permanent		County Extension Office
2) Leaders Honor Roll	Permanent		County Extension Office
STAFF DEVELOPMENT			
1) In-Service Training Records	Permanent		ETCS
2) Study Leave Records	Permanent		Human Resources
GRANTS & CONTRACTS (University of Missouri Extension & Council Sponsored)			
1) University of Missouri Extension			
a. Requests for Proposals, Proposals	Reference value. If awarded, 3 years after final invoice or audit		Administrative Management-Fiscal
b. Awards/Contracts, Operating Files	3 years after final invoice or audit		Administrative Management-Fiscal
2) County			
a. Requests for Proposals, Proposals	Reference value		County Extension Office
b. Awards/Contracts, Operating Files	3 years after final invoice or audit		County Extension Office