

**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	Permanent	Electronic - archive	State 4-H Office
b. Volunteer Leader Forms	5 years past active volunteer status	Destroy	Area Youth Specialist
c. ES-237 Reports	Permanent		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.	Permanent		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

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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			
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
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