RECORDS RETENTION SCHEDULE

Local Schedule SD applies to charter schools and Local Schedule GR applies to all local governments. The schedules are available from the Texas State Library and Archives Commission website at https://www.tsl.texas.gov/slrm/recordspubs/localretention.html. The following from Schedule GR apply specifically to charter schools and school districts:

GR 1000-01 AGENDAS

Open meetings.

1) If the minutes describe each matter considered by the governing body and reference to an agenda is not required.
2) If the minutes do not describe each matter considered by the governing body and reference to an agenda is required.

GR 1000-25 CONTRACTS, LEASES, AND AGREEMENTS

(a) Open meetings
   1) If the minutes describe each matter considered by the governing body and reference to an agenda is not required.
   RETENTION: Two (2) years.

   2) If the minutes do not describe each matter considered by the governing body and reference to an agenda is required.
   RETENTION: Permanent.

(b) Certified agendas of closed meetings.
RETENTION: Two (2) years.

GR 1000-03 MINUTES

(a) Written minutes.
RETENTION: Permanent.

(b) Notes taken during meetings from which written minutes are prepared.
RETENTION: 90 days after approval of minutes by the governing body.

(c) Audiotapes of open meetings, except as described in (d), for which written minutes are not prepared.
RETENTION: Permanent.

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(d) Audiotapes of workshop sessions of governing bodies in which votes are not made and written minutes are not required by law to be taken.
RETENTION: Two (2) years.

(e) Audiotapes of open meetings for which written minutes are prepared.
RETENTION: 90 days after approval of minutes by the governing body.

(f) Certified audiotapes of closed meetings.
RETENTION: Two (2) years.

(g) Supporting documentation – One copy of each document of any type submitted to a meeting of a governing body for consideration, approval, or other action, if such action is reflected in the minutes of the meeting.
RETENTION: Two (2) years.

GR 1000-26 CORRESPONDENCE, INTERNAL MEMORANDA, AND SUBJECT FILES

Retention Note: The minimum retention period for correspondence or internal memoranda in categories (a) and (b) directly linked to another record series or group listed in this or other commission schedules is that assigned to the other group or series. The retention periods that follow are for correspondence and internal memoranda that do not readily fall within other record groups.

(a) Administrative – Incoming/outgoing and internal correspondence pertaining to the formulation, planning, implementation, modification, or redefinition of the programs, services, or projects of a local government and the administrative regulations, policies, and procedures that govern them. May also include subject files, which are collections of correspondence, memos and printed materials on various individuals, activities, and topics.
RETENTION: Four (4) years.

(b) General – Incoming/outgoing and internal correspondence pertaining to the regular operation of the policies, programs, services, or projects of a local government. May also include subject files, which are collections of correspondence, memos and printed materials on various individuals, activities, and topics.
RETENTION: Two (2) years.

(c) Routine - Correspondence and internal memoranda such as letters of transmittal, requests for publications, internal meeting notices, and similar routine matters. May also include subject files, which are collections of correspondence, memos and printed materials on various individuals, activities, and topics.
RETENTION: AV (as long as administratively valuable)

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GR 1075-01 BIDS AND BID DOCUMENTATION

(a) Successful bids and requests for proposals, including invitations to bid, bid bonds and affidavits, bid sheets, and similar supporting documentation.
RETENTION: Fiscal year end **+ five (5) years.**
Retention Note: If a formal written contract is the result of a successful bid or request for proposal, the successful bid or request for proposal and its supporting documentation must be retained for the same period as the contract. See item number GR1000-25.

(b) Unsuccessful bids.
RETENTION: Two (2) years.

(c) Requests for informal bid estimates, quotes, or responses from providers for the procurement of goods or services for which state law or local policy does not require the formal letting of bids.
RETENTION: One (1) year.

(d) Requests for information (RFI) preliminary to the procurement of goods or services by direct purchase or bid.
RETENTION: AV

GR 1075-03 PURCHASE ORDER AND RECEIPT RECORDS

(a) Purchase orders, requisitions, and receiving reports.
RETENTION: Fiscal year end **+ five (5) years**

(b) Purchasing log, register, or similar record providing a chronological record of purchase orders issued, orders received, and similar data on procurement status.
RETENTION: Fiscal year end **+ three (3) years**

(c) Packing slips and order acknowledgments.
RETENTION: AV

(d) Vendor and commodity lists.
RETENTION: Until superseded

GR 1075-16 CONSTRUCTION PROJECT RECORDS

(a) Records concerning the planning, design, construction, conversion, or modernization of local government-owned facilities, structures, and systems, including feasibility, screening, and implementation studies; topographical and soil surveys and reports; architectural and engineering drawings, elevations, profiles, blueprints, and as-builts; inspection and investigative reports; laboratory test reports; environmental impact

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statements; construction contracts and bonds; correspondence; and similar documentation except as described in (b), (c) or (d).
RETENTION: Permanent.
Retention Note: If a structure, facility, or system is sold or transferred to another person or entity, the local government must retain the original records relating to its construction. Copies of the records may be given to the person or entity to which the structure, facility, or system is sold or transferred.

(b) Records of the types described in GR1075-16a relating to the construction of prefabricated storage sheds, bus shelters, parking lot kiosks, non-structural recreational facilities such as baseball diamonds and tennis courts, and similar structures and facilities.
RETENTION: Completion of the project **+ ten (10) years.**

(c) Records relating to construction projects described in GR1075-16a and GR1075-16b, that are transitory or of ephemeral relevance, and are not required for maintaining, modifying, and repurposing the building or structure. Records may include, but are not limited to, rejected design plans, delivery tickets for expendable products, daily work reports, etc.
RETENTION: Five (5) years.

(d) Line Locate Requests, Call Before You Dig records, or other similar records documenting requests for information regarding locations of the underground cable or utility lines.
RETENTION: Completion of project requiring the locate request **+ two (2) years.**

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