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:

SEC. 1. 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.
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.

Closed meetings.

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

SEC. 2. 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) Audiovisual recordings of open meetings, except as described in (d), for which written minutes are not prepared.
RETENTION: Permanent.

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

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(f) Certified audiovisual recordings 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.

SEC. 3. 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.

Contracts, leases, and agreements, including reports, correspondence, performance bonds, certificates of liability, and similar records relating to their negotiation, administration, renewal, or termination, **except** construction contracts.
RETENTION: Four (4) years after the expiration or termination of the instrument according to its terms.

Retention Note: Review before disposal; some records of this type may merit **PERMANENT** retention for historical reasons.

SEC 4. 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

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correspondence, memos and printed materials on various individuals, activities, and topics.
RETENTION: Four (4) years.
Retention Note: Review before disposal; some correspondence of this type may merit **PERMANENT** retention for historical reasons.

(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.
Retention Note: Records management officers should use caution before disposal of these records to ensure the records should not be classified under administrative correspondence.

(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)

SEC. 5. 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 after date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.

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(e) Parts and supplies inventory records.
RETENTION: One (1) year.

SEC. 6. 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

W-9 IRS Form used to request a taxpayer identification number for reporting information to IRS. This includes W-9 forms received by local governments from vendors.
RETENTION: Date account is opened or date instrument purchased + **three (3) years**.

SEC. 7. 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 statements; construction contracts and bonds; correspondence; and similar documentation except as described in GR 1075-16(b), (c) or (d).
RETENTION: Life of asset + **ten (10) years.**
Retention Note: Review before disposal; some records may merit **PERMANENT** retention for historical reasons. 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. Records of the types described relating to places eligible for or already listed as historic by national, state, or local organizations or authorities must be retained **PERMANENTLY**.

(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.

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RETENTION: Completion of the project **+ ten (10) years.**
Retention Note: Review before disposal; some records may merit PERMANENT retention for historical reasons. Records relating to construction of some of the described structures will have historical value if they are closely associated with a major structure as described in GR1075-16a. For example, records relating to the construction of gazebos, fountains, walls, or statuary located on the grounds of a county courthouse are part of the landscape of the courthouse and its grounds and should be retained **PERMANENTLY**. Records of the types described relating to places eligible for or already listed as historic by national, state, or local organizations or authorities must be retained **PERMANENTLY**. If the construction of a structure described in GR1075-16b includes infrastructure (i.e. electrical lines, underground water lines, etc.), records of the infrastructure must be maintained Life of Asset + 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.
Retention Note: Records of the types described relating to places eligible for or already listed as historic by national, state, or local organizations or authorities must be retained **PERMANENTLY**.

(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.**
Retention Note: If damage to utility lines becomes subject to litigation, the locate records must be retained in accordance with GR1000-31 (Litigation Case Files)

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