

## FERRIS STATE UNIVERSITY

### Schedule 2003.0028- Library Systems and Operations

N.b. If departments are unable to retain records for the length of time set out in this general record schedule due to space constraints, consult the University's Archivist for assistance and storage at the Record Center.

Item No	Record Series, Title and Description	Department Retention	Records Center Retention	University Archives
1	<b>Acquisition/ Collection Development Records.</b> Includes invoices, vendor information and correspondence, quotations and notes on vendors/contracts. Official departmental copy kept by Dean's office. Do not need to certify destruction.	CR+2 Destroy		
2	<b>Committee Records.</b> Includes minutes, agendas, and supporting documentation. This is considered a historical record for material that relates specifically to the operations of LSO or has an LSO staff member in a leadership position on the committee. Search committee materials fall under the general schedule.	CR+1		Yes
3	<b>Contracts/ RFP Records.</b> Includes RFPs, contracts and licensing agreements with supporting documentation such as correspondence, drafts and notes. Do not need to include unsuccessful bid proposals. Contracts of less than \$10,000 may be destroyed at the end of the 7 year period.	CR+7		Yes
4	<b>Donation Records.</b> Includes signed donation forms, correspondence and spreadsheets listing donations within a year.	CR+5		Yes
5	<b>Library Catalog Records.</b> Includes bibliographic, item, patron, holdings, check-in, vendor and authority records. Items become inactive when superceded or withdrawn from system. Materials are backed up to tape.	ACT Destroy		
6	<b>OCLC Holdings Records.</b> Record of holdings within the OCLC online catalog, maintained on the OCLC servers. Records become inactive once they are no longer held by Ferris.	ACT Destroy		
7	<b>Personnel and Payroll Records.</b> These records are files maintained by departments regarding employees and student employees within each department. These generally include copies performance evaluations, excused absence forms, recap time sheets, and other copies of similar records, but do not include records pertaining to work study or similar financial aid records for student employees. Do not need to certify destruction	CR +5 Destroy		

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8	<b>Serials Records.</b> This series documents the receipt and payment history for serials purchased by the libraries. This series may include but is not limited to: periodical check-in lists; database reports; item records; current inventories of titles from specific vendors, vendor information and invoices. Check in lists must be retained until the materials are completely processed and cataloged.	CR+5 Destroy	Destroy-ID	
9	<b>Statistical Records.</b> Spreadsheets of library collection statistics, comparative database use statistics, circulation and door count statistics and material collected for internal/external surveys. Submit to University Archives when created.	ACT		Yes
10	<b>University Subject Files.</b> These records are used to document the LSO's involvement and knowledge of the activities of the university. A subject file typically includes correspondence, consultations, departmental meeting minutes, notes, organizational information, reports, periodic activity reports and publications. Samples of a subject file might include: software implementation or building projects.	ACT+7		Yes

September 2003; updated March 2008; December 2012\*

Key:

ACT = Active  
CR = Creation  
SUP = Retain Until Superseded  
CY = Calendar Year (current)  
ID = Immediate Disposal  
FY = Fiscal Year (current)  
PM = Permanent  
y = year(s)