

LEHMAN COLLEGE: DEPARTMENTAL RETENTION SCHEDULE 4/24/2014

LIBRARY

Item	Record Series Title	Description / Examples	Retention	CUNY Schedule Reference
LI-1	Meeting Records	For departmental and committee meetings, including all records accepted as part of minutes Agendas, documents distributed at meetings, ballots, background material	Permanent 1 year	General 1[1] General 3[3]
LI-2	Resumes--Unsolicited	Not related to any advertised or available position	While Needed	General 10[10] c
LI-3	Publications--Significant	Official copies of publications, including newsletters, press releases, published reports, bulletins, homepages or other website files, educational or informational program materials, newspapers, yearbooks, or catalogs prepared by or for the College	Permanent	General 11[11] a
LI-4	Publications--Routine	Newsletters, brochures, flyers, and records used to update department's website	While Needed	General 11[11] b

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LI-5	Survey Records	Survey results, including official copy of survey and permission forms	6 years	General 15[15] a
		Completed survey forms	Until survey results prepared	General 15[15] b
LI-6	Class Requests	Requests from non-Library faculty for Library instruction	While Needed	General 18[18]
LI-7	Equipment Borrowing Records	Documents detailing usage of Library equipment	While Needed	General 18[18]
LI-8	Fine Records-- <i>Records of paid and unpaid book fines, late/lost books, and equipment returns</i>	When account is settled and no hold has been put on the student's record When account is settled or unsettled, and a hold has been put on the student's record	While Needed 6 years after final entry in file showing payment and/or amnesty/waiver, and removal of registration block	General 20[20] and 25[25] Fiscal 20[86]

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LI-9	Reports--Statistical	Statistical reports created for any purpose by any Library department	6 years	General 22[22]
LI-10	Reports--Annual/Special	Annual or special reports containing substantial evidence of Library policy, procedures, plans, or directions	Permanent	General 23[23] a
LI-11	Reports--Other	Reports where critical information is contained in other reports, reports that document internal management and housekeeping activities, or reports that contain only routine legal, fiscal, or administrative information	6 years	General 23[23] b
LI-12	Accreditation Files-- Significant	Significant correspondence, reports, questionnaires, self-study records and reports, guides, and related documents transmitted between the College and accrediting bodies	Permanent	Academic Affairs 1[53] a

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LI-13	Accreditation Files-- Routine	Routine correspondence and transmittal records, drafts of guides and reports, and fiscal records	6 years after accreditation approved or denied	Academic Affairs 1[53] b
LI-14	Archive Inventory	Inventory of records held in the Archives	Until superseded or obsolete	Archives 2[35]
LI-15	Archival Administration Records	Appraisal and accessioning documentation, including assessment of conservation needs	Permanent	Archives 5[38] a
		Processing and management working papers, drafts, notes, and related records	While Needed	Archives 5[38] b
LI-16	Archival Finding Aids	Guide, listing, index, or other finding aid to archival records	Until superseded or obsolete	Archives 6[39]

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LI-17	Records on Use of Archival Materials	Log or register of researchers, and patron's registration for use of archival records Researcher interviews, reference statistics, requests for records, or similar reference service records	6 years While Needed	Archives 7[40] a Archives 7[40] b
LI-18	Donor (and Prospective Donor) Information Records	Records containing information on individuals, organizations, institutions, foundations, or corporations	While Needed	Development 1[78]

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Item	Record Series Title	Description / Examples	Retention	CUNY Schedule Reference
LI-19	Records of Gifts Received- <i>Record of gifts and bequests to the College, including copy of will, copies of deeds, maps and surveys (if applicable), and records of establishment of and use of monies generated by trust fund or endowment</i>	a) When trust fund or endowment is involved b) For gift of work of art, historical or other artifact, or historical manuscript c) For gift or bequest not covered in "a" or "b", or by note on left	Permanent Permanent 6 years	Development 2[283] a Development 2[283] b Development 2[283] c
LI-20	Petty Cash Records	Cash transaction record showing cash received from collection of various fees and petty cash disbursed, including monies transferred into miscellaneous Library Funds such as the Lost Books Fund	6 years	Fiscal 5[203]
LI-21	Instructional Materials (including Lib Guides)	Materials created by the Library to aid in use of Library services and facilities	While Needed	Instruction 2[106]

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Item	Record Series Title	Description / Examples	Retention	CUNY Schedule Reference
LI-22	Borrowing/Interlibrary Loan Records	Borrowing or loaning records, including interlibrary loan	While Needed	Library 3[257]
LI-23	Shelf List	Continuously updated catalog of library holdings in call number order	Until superseded or obsolete	Library 4[258] b
LI-24	Individual Title Purchase Requisitions	Requisitions that have been filled or found to be unfillable	1 year	Library 5[259]
LI-25	Book Selection Records	Records documenting selection of books and other library materials	While Needed	Library 6[260]
LI-26	Complaint Records	Library complaint records, including evaluations by staff, patrons' complaints, and record of final decision	6 years after last entry	Library 7[261]
LI-27	Patron Registration Records--Special Collections	For rare books, manuscripts, archives	Permanent, to comply with administrative requirements	Library 8[262]

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LI-28	Museum Exhibit Files-- <i>Records documenting planning, construction, and use of exhibit, including but not limited to installation photographs and slides, sketches, worksheets, publicity, brochures, exhibit catalogs, inventory lists, loan agreements, and visitor surveys</i>	Brochures, exhibit catalogs, installation photographs and slides, and inventory lists All other records	Permanent 6 years after exhibit closed	Museum 1[284] a Museum 1[284] b

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LI-29	Special Collections/ Acquisitions Administrative Files-- <i>Records documenting the acquisition, accession, deaccession, loan, conservation, and use of materials, including but not limited to accession register, loan agreement, inventory of collection, and conservation treatment record</i>	Routine records, including but not limited to notes and internal memoranda All other collections records, including but not limited to correspondence, donor agreements, purchasing records, and other documents related to the acquisition of rare books, manuscripts, or other special collection items	1 year Permanent	Museum 2[285] a Museum 2[285] b
LI-30	Grant Depository Records	Records documenting the acquisition of materials added to the government repository	1 year	Museum 2[285] a

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LI-31	Personnel Records--Search Records	Recruitment, hiring, interview, and selection records, including but not limited to correspondence, reports, selection criteria, interview notes, background check records, rating and ranking forms, evaluations, and other records pertaining to the hiring, promotion, demotion, transfer, layoff, and termination of employees	3 years after completion of personnel action, or until records transferred to either Human Resources or the Office of Diversity, Compliance & Inclusion	Personnel 37[750]
LI-32	Personnel Records--Evaluations	Evaluations of faculty by individuals other than students, including but not limited to teaching observation reports and annual evaluations	6 years after termination of employment, or until transferred to either Human Resources or the Office of the Provost	Instruction 9[113] b
LI-33	Purchasing Files--Other than Archival	Official copies of contracts, correspondence, approval plans, other documents related to routine purchases from vendors with whom the department does business, including purchase orders or requisitions	6 years after completion of purchase, or 6 years after final payment under contract, whichever is longer	Purchasing 1[496] and 2[498]

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