

RECORDS RETENTION SCHEDULE

Item No.	Records Series Title	Description	Retention Period	Notes
1	Administrative Correspondence	Incoming, outgoing and internal correspondence pertaining to policies, programs, services, or projects	3 years; review for archival value	
2	General Correspondence	Non-administrative correspondence	1 year	
3	Meeting Minutes and Agenda		Permanent record copy retained	
4	Plans and Planning Records	Plans and records relating to new or redefined programs, services, or projects	AC+3 years	
5	Publications		AC+2 years	
6	Reports and Studies		3 years	
7	Accounting: Annual Financial Reports		AC+6 years	
8	Grants: Federal		AC+3 years	
9	Grants: Non-Federal		FE+3 years	
10	Federal Tax Records		AC+4 years	
11	Accounting: Signature Authorizations	Signature cards or similar records establishing authority of a member to initiate or authorize financial transactions on behalf of Western Council	US+FE+3 years	US+FE= Signature authority revoked due to position change
12	Contracts	Contracts, agreements, bid documents	AC+4 years	AC=Until contract is completed, expired, or terminated
13	Audits		AC+7 years	Includes working Papers
14	Budget/Fiscal Records		AC + 3 years	

Retention Codes:

AC = After closed, terminated, completed, expired, settled

FE = Fiscal year end

US = Until Superseded