

County Office Retention Resource Guide
Rev. 8/2014



			RRS Reference
Civil Rights and Affirmative Action			
	Compliance guidelines for County Extension Agents	Permanently	
	Civil Rights Act of 1964	Available online	
	Affirmative Action Plan for Extension	Available online	3.3.001
	General correspondence and reports dealing with Civil Rights	Permanently	
	Civil rights publications	Permanently	
	Compliance reviews	Maintained in Laserfiche by District Office	
	Supporting documents produced by county for compliance review	Current + 7 years	
	Documents regarding the history of Extension (including records of historical value for county Extension program)	Permanently	
Records and Reports			
	Annual Reports (including county annual report)	Current + 3 years	1.1.067
	Quarterly interpretation piece	Current + 3 years	1.1.067
	Monthly reports	Current + 1 year	1.1.069
	Travel authorizations/requests	Current + 3 years	3.3.023
	Travel expense reports for travel reimbursed by state accounts	Current + 3 years	4.2.007
	Postage reports from Stamps.com	Current + 3 years	5.1.005
	Support group fund report	Current + 3 years	1.1.067
	Ag Increment Report (*county copy is convenience copy)	Record copy at College Station; maintain county copy as long as valuable	1.1.067
	Crop reports	Maintained online	Online
Inventory Records			
	Annual inventory records, certification	Maintained online and in Laserfiche	5.2.xxx
	Notes and records regarding inventory items	Current + 3 years	5.2.xxx
	Asset transfer forms (including surplus transfers)	Maintained in Laserfiche by District Office	5.2.xxx
County Records (Including Fiscal Records)			
	Office expense records	Current + 3 years	4.2.007
	County employee handbook or policies	Until superseded + 3 years	1.1.070
	Office conference minutes	1 year	1.1.063
	Support staff position descriptions	5 years after employee's resignation/termination	3.1.023
	CB-5 (County Budget) (*county copy is a convenience copy)	Record copy is in Laserfiche; at county keep until superseded	4.5.006

	Certificate of Expenditure (*county copy is a convenience copy)	Record copy is in Laserfiche; at county keep until superseded	4.5.006
	County fund budget recommendation (if applicable)	Record copy is in Laserfiche; at county keep until superseded	4.5.006
Communications			
	News articles	2 years	1.1.019
	Phone records/messages	1 year	5.5.003/1.1.057
	Newsletters	Current + 2 years	1.3.001
	Correspondence	2 years	1.1.008
Program Development			
	Extension program council	Keep until superseded	N/A
	Supporting documents for agent performance evaluation	Employee termination/resignation + 5 years	3.1.019
Events/Programs			
	Sign-in sheets	2 years	1.1.062
	Agendas	2 years	1.1.062
	Program flyers/meeting notices	2 years	1.1.062
	Training materials	2 years	1.1.062/1.1.043
	Mailing lists	Until superseded	5.1.004
	Event specific waivers and releases (ie: county camp)	2 years	01.120.20
	EE Club records	Current + 2 years (EE club can keep older docs of historical value)	1.1.062
4-H Materials - Affirmative Action			
	Original county plans and map	Permanently	State 4-H Office
	County plan/map revision (Form 10 and ES-237)	Permanently	State 4-H Office
	Annual status report	Permanently	State 4-H Office
	Correspondence	Permanently	State 4-H Office
	Information support materials	Permanently	State 4-H Office
	Documentation	Permanently	State 4-H Office
4-H Materials - Program Materials			
	Committee agendas, minutes and other documents	Current + 2 years	State 4-H Office
	Council delegate lists	Current + 2 years	State 4-H Office
	Council bylaws	Until superseded	State 4-H Office
	Council minutes	Current year	State 4-H Office
	Volunteer leaders association delegate lists	Current + 2 years	State 4-H Office
	Volunteer leaders association bylaws	Until superseded	State 4-H Office
	Volunteer leaders association minutes	Current + 2 years	State 4-H Office
	ES-237 summaries	Current + 2 years	State 4-H Office
	County 4-H rules and guidelines	Permanently	State 4-H Office
	Enrollment forms	Current + 2 years	State 4-H Office
	List of donors and key supporters	Current + 2 years	State 4-H Office
4-H Materials - Awards Program			
	Event/activity registration	Current + 2 years	State 4-H Office

	Gold Star winners	Permanently	State 4-H Office
	Event results	Current + 2 years	State 4-H Office
	Insurance documentation and claims	7 years	State 4-H Office
4-H Materials - Other			
	Declaration of eligibility for 4-H participants	Until superseded	State 4-H Office
	Records from dissolved clubs	Permanently	State 4-H Office