

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	1.1067
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

		RRS Reference
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County employee handbook or policies	Until superseded + 3 years	1.1.070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CB-5 (County Budget) (*county copy is a convenience copy)	Record copy is in Laserfiche; at county keep until superseded	4.5.006
Certificate of Expenditure (*county copy is a convenience copy)	Record copy is in Laserfiche; at county keep until superseded	4.5.006
County fund budget recommendation (if applicable)	Record copy is in Laserfiche; at county keep until superseded	4.5.006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Extension program council	Keep until superseded	N/A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 superceded	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

		RRS Reference
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

"RRS" refers to the cross-reference to the Texas A&M University Records Retention Schedule