

This list of retention schedules marked as having archival value was compiled for your convenience from the larger Records Retention schedule, found at <https://records.uflib.ufl.edu/record-retention/retention-schedules/>. This list is not exhaustive—the University Archives may have interest in records not included on this list. Please contact the University Archives at archives@uflib.ufl.edu for more advice on transferring records or determining if records have archival value.

Accreditation Records

Schedule Identifier: GS5

Item Number: #96

Retention: 5 anniversary years after accreditation report is issued or until completion of the next accreditation cycle, whichever is longer. / Offer to University of Florida Archives for review.

This record series consists of accreditation report and final self-study documenting the process and status of becoming accredited and/or activities associated with reporting and/or confirming the accreditation status of the school. See also “ACCREDITATION RECORDS: SUPPORTING DOCUMENTS.”

Administrator Records: Agency Director / Program Manager

Schedule Identifier: GS1-SL

Item Number: #122

Retention: 10 anniversary years / Offer to University of Florida Archives for review.

This record series consists of records documenting the substantive actions of elected or appointed program managers or agency directors. These records constitute the official record of an agency's performance of its functions and formulation of policy and program initiatives. This series may include various types of records such as correspondence; memoranda; statements prepared for delivery at meetings, conventions, or other public functions that are designed to advertise and promote departmental programs, activities, and policies; interviews; and reports concerning agency program development and implementation. See also “CORRESPONDENCE AND MEMORANDA: PROGRAM AND POLICY DEVELOPMENT,” “DIRECTIVES/POLICIES/PROCEDURES,” and “SUBJECT/REFERENCE FILES.” ***These records may have archival value.***

Annual Reports: Departmental

Schedule Identifier: GS5

Item Number: #43

Retention: 3 fiscal years / Offer to University of Florida Archives for review.

This record series consists of summaries of departmental, university or division activities by year. These reports may be used in compiling the official college/university annual report. For retention of the official annual report of the college/university, see *General Records Schedule GS1-SL for State and Local Government Agencies*, Item #245, Annual Reports, Governing Body.

Annual Reports: Governing Body

Schedule Identifier: GS1-SL

Item Number: #245

Retention: Permanent / Offer to University of Florida Archives for review.

This record series consists of the annual program, narrative, and statistical report issued by the highest level of authority within an agency. It is a comprehensive compilation of all annual reports submitted by departments, divisions, bureaus, program offices, and other subdivisions including boards, commissions, and dependent special districts. This is NOT the annual financial report required under Section 218.32, Florida Statutes, nor is it the annual financial audit report required under Section 218.39, Florida Statutes, and Chapters 10.558(3), 10.807(3), and 10.857(4) of the Rules of the Auditor General of the State of Florida. See also “ANNUAL REPORTS: COUNTY

GOVERNMENT," "AUDITS: AUDITOR GENERAL," "AUDITS: INDEPENDENT," and "FINANCIAL REPORTS: LOCAL GOVERNMENT ANNUAL REPORTS." *These records may have archival value.*

Audits: State / Federal

Schedule Identifier: GS1-SL

Item Number: #83

Retention: 10 fiscal years after audit report release date. / *Offer to University of Florida Archives for review.*

This record series consists of reports issued by a federal or state auditor to establish the position of the audited agencies against their performance standards. The audits may be instigated by any agency, organization, or internal management. Records of such audits for state agencies are created pursuant to Section 11.45, Florida Statutes Definitions; authorities; reports; rules. See also "AUDITS: AUDITOR GENERAL," "AUDITS: INDEPENDENT," "AUDITS: INTERNAL," and "AUDITS: SUPPORTING DOCUMENTS." *These records may have archival value.*

Charters / Amendments / Bylaws / Constitutions

Schedule Identifier: GS1-SL

Item Number: #207

Retention: Permanent. / *Offer to University of Florida Archives for review.*

This record series consists of foundation documents establishing an organization and its mission, functions, duties and responsibilities, and organizational structure. See also "ORDINANCES," "PROCLAMATIONS," and "RESOLUTIONS." *These records may have archival value.*

Comprehensive Master Plans: Adopted

Schedule Identifier: GS1-SL

Item Number: #166

Retention: Permanent. / *Offer to University of Florida Archives for review.*

This record series consists of adopted original and succeeding plans of local governmental agencies required by the State of Florida, including, but not limited to, maps, surveys, site plans, and any other material comprising or incorporated into the adopted comprehensive plan and all associated amendments. The plans may contain elements such as: growth management, sanitary sewer records, drainage records, future land use records, traffic circulation, economic assumptions, conservation, housing, recreation and open space, solid waste, electric utilities, potable water, intergovernmental coordination, mass transit, and all other local government related functions. Refer to Chapter 163, Part II, Florida Statutes, Growth Policy; County and Municipal Planning; Land Development Regulation. See also "COMPREHENSIVE MASTER PLANS: ADOPTED (SUPPORTING DOCUMENTS)." *These records may have archival value.*

Comprehensive Master Plans: Adopted (Supporting Documents)

Schedule Identifier: GS1-SL

Item Number: #174

Retention: 5 anniversary years after adopted. / *Offer to University of Florida Archives for review.*

This record series consists of items used in preparing, but not incorporated into, the adopted original and succeeding plans of local governmental agencies required by the State of Florida. The supporting documents may include, but are not limited to, additional maps, surveys, site plans, correspondence, public opinion polls, copies of relevant studies or analyses, and other materials that support the proposed plan. Refer to Chapter 163, Part II, Florida Statutes, Growth Policy; County and Municipal Planning; Land Development Regulation. See also "COMPREHENSIVE MASTER PLANS: ADOPTED." *These records may have archival value.*

Correspondence and Memoranda: Administrative

Schedule Identifier: GS1-SL

Item Number: #17

Retention: 3 fiscal years. / Offer to University of Florida Archives for review.

This record series consists of correspondence and memoranda of a general nature that are associated with administrative practices or routine office activities and issues but that do not create policy or procedure, document the business of a particular program, or act as a receipt. See also "CORRESPONDENCE AND MEMORANDA: PROGRAM AND POLICY DEVELOPMENT," "DIRECTIVES/POLICIES/PROCEDURES," and "INFORMATION REQUEST RECORDS." *These records may have archival value.*

Correspondence and Memoranda: Program and Policy Development

Schedule Identifier: GS1-SL

Item Number: #338

Retention: 5 fiscal years. / Offer to University of Florida Archives for review.

This record series consists of correspondence and memoranda documenting policy development, decision-making, or substantive programmatic issues, procedures, or activities. See also "ADMINISTRATOR RECORDS: AGENCY DIRECTOR/PROGRAM MANAGER," "CORRESPONDENCE AND MEMORANDA: ADMINISTRATIVE," and "DIRECTIVES/POLICIES/PROCEDURES." *These records may have archival value.*

Course and Program Records: Descriptions and Requirements

Schedule Identifier: GS5

Item Number: #50

Retention: 1 academic year after course is permanently discontinued. / Offer to University of Florida Archives for review.

This record series documents degrees and courses offered in each program area. The series may include, but is not limited to, course descriptions; program requirements; proposals, creation and disbandment of classes, programs, internships, centers and institutes; and other documentation related to each course and program. This series may also include a copy of college and university undergraduate and graduate course catalogs.

Directives / Policies / Procedures

Schedule Identifier: GS1-SL

Item Number: #186

Retention: 2 anniversary years after superseded or becoming obsolete. / Offer to University of Florida Archives for review.

This record series consists of the official management statements of policy for the organization, supporting documents, and the operating procedures that outline the methods for accomplishing the functions and activities assigned to the agency. The series may include, but is not limited to, such materials as employee handbooks, standard operating procedures, management approval documentation, and correspondence and memoranda stating the policies and procedures to be followed by employees. See also "ADMINISTRATOR RECORDS: AGENCY DIRECTOR/PROGRAM MANAGER," "CORRESPONDENCE AND MEMORANDA: ADMINISTRATIVE," "CORRESPONDENCE AND MEMORANDA: PROGRAM AND POLICY DEVELOPMENT," "DISASTER PREPAREDNESS PLANS," and "DISASTER PREPAREDNESS DRILL RECORDS." *These records may have archival value.*

Directives / Policies / Procedures: Healthcare

Schedule Identifier: GS4

Item Number: #120

Retention: 7 anniversary years after superseded or obsolete. / ***Offer to University of Florida Archives for review.***

This record series consist of directives, policies and procedures outlining the methods for accomplishing the functions and activities of healthcare facilities. These records demonstrate the operational atmosphere and give guidance to medical staff on the care and treatment of a patients. Retention is pursuant to Section 95.11, Florida Statutes, Limitations other than for the recovery of real property. ***This series may have archival value.***

Directives / Policies / Procedures: President / Provost

Schedule Identifier: GS5

Item Number: #51

Retention: 10 anniversary years after obsolete or superseded. / ***Offer to University of Florida Archives for review.***

This record series consists of the official management statements of policy from the president's or provost's office for the university and the operating procedures which outline the methods for accomplishing the functions and activities assigned to each department. It includes all memoranda and correspondence generated relating to the policies and procedures which are to be followed by employees. ***These records may have archival value.***

Disaster Preparedness Plans

Schedule Identifier: GS1-SL

Item Number: #210

Retention: 5 fiscal years after superseded or becoming obsolete. / ***Offer to University of Florida Archives for review.***

This record series consists of disaster preparedness and/or recovery plans adopted by an agency. Section 252.365, Florida Statutes, Emergency coordination officers; disaster-preparedness plans, requires state agencies to develop and maintain "a disaster preparedness plan that is coordinated with the applicable local emergency-management agency..." Section 252.38, Florida Statutes, Emergency management powers of political subdivisions, authorizes counties and municipalities to "develop an emergency management plan and program that is coordinated and consistent with the state comprehensive emergency management plan and program." See also "DISASTER PREPAREDNESS DRILL RECORDS," "DIRECTIVES/POLICIES/PROCEDURES" and "EMERGENCY MANAGEMENT PLAN REVIEW RECORDS." ***These records may have archival value.***

Expenditure Plans: Capital Improvement

Schedule Identifier: GS1-SL

Item Number: #208

Retention: 50 anniversary years. / ***Offer to University of Florida Archives for review.***

This record series consists of capital improvement expenditure plans detailing the long-term building and capital improvement needs of the agency. These plans may demonstrate a priority listing for capital improvement expenditures as well as a time line for each project's completion. Records may also include, but are not limited to, background supporting materials and reports and related correspondence. "Capital Improvements" shall mean improvements to real property (land, buildings, including appurtenances, fixtures and fixed equipment, structures, etc.), that add to the value and extend the useful life of the property, including construction of new structures, replacement or rehabilitation of existing structures (e.g., major repairs such as roof replacement), or removal of closed structures. ***These records may have archival value.***

Feasibility Study Records

Schedule Identifier: GS1-SL

Item Number: #106

Retention: 3 fiscal years after completion of study. / ***Offer to University of Florida Archives for review.***

This record series consists of working papers, correspondence, consulting firm reports, and management committee reports investigating various projects of the governing agency. These files cover potential projects under consideration or those ideas that are studied and discarded by a governmental agency. If the agency decides to continue with the project, these records should be scheduled under one of the "Project Files" items or other applicable item. ***These records may have archival value.***

Graduate Dissertations and Theses

Schedule Identifier: GS5

Item Number: #111

Retention: Permanent / ***Offer to University of Florida Archives for review.***

This record series consists of final and accepted graduate dissertations and theses submitted to fulfill graduation requirements, along with abstracts and any other required accompanying documentation. The series may also include other culturally or historically significant work of the student submitted to fulfill graduation requirements.

Institutional Research Reports

Schedule Identifier: GS5

Item Number: #15

Retention: 10 fiscal years. / ***Offer to University of Florida Archives for review.***

This record series consists of institutional research reports generated by the college along with supporting documentation. The series may include reports prepared routinely or by specific request to provide information about the institution and its students. This series does not include personal research files of faculty. ***These records may have archival value.***

Land Development and Planning Project Files

Schedule Identifier: GS1-SL

Item Number: #352

Retention: Permanent. / ***Offer to University of Florida Archives for review.***

This record series documents land development projects brought before local government planning or development commission or appeal bodies or before other special or ad hoc committees constituted for similar purposes. Records may include, but are not limited to, staff reports, determinations and evaluations, correspondence, project case files, drawings and plans, and final determinations. See also "LAND DEVELOPMENT AND PLANNING PROJECT FILES: DENIED/ABANDONED PROJECTS," "LAND DEVELOPMENT AND PLANNING PROJECT FILES: PRELIMINARY DRAWINGS/DRAFTS," and "LAND DEVELOPMENT AND PLANNING STUDIES AND REPORTS." ***These records may have archival value.***

Land Development and Planning Project Files: Denied / Abandoned Projects

Schedule Identifier: GS1-SL

Item Number: #403

Retention: 20 anniversary years after project denied or abandoned. / ***Offer to University of Florida Archives for review.***

This record series documents land development projects brought before local government planning or development commission or appeal bodies or before other special or ad hoc committees constituted for similar purposes, in instances when the projects were denied by the government bodies or abandoned by the developers. Records may include, but are not limited to, staff reports, determinations and evaluations, correspondence, project case files,

drawings and plans, and final determinations. See also "LAND DEVELOPMENT AND PLANNING PROJECT FILES," "LAND DEVELOPMENT AND PLANNING PROJECT FILES: PRELIMINARY DRAWINGS/DRAFTS," and "LAND DEVELOPMENT AND PLANNING STUDIES AND REPORTS." *These records may have archival value.*

Land Development and Planning Project Files: Preliminary Drawings / Drafts

Schedule Identifier: GS1-SL

Item Number: #404

Retention: 10 anniversary years. / *Offer to University of Florida Archives for review.*

This record series consists of preliminary or draft documents used to support the creation of project documentation that is brought before the local government planning or development commission or appeal bodies, or before other special or ad hoc committees constituted for similar purposes. Records in this series are not brought before the local government planning or development commission or other applicable entity and are not intended to serve as documentation of planning decisions or processes. See also "LAND DEVELOPMENT AND PLANNING PROJECT FILES," "LAND DEVELOPMENT AND PLANNING PROJECT FILES: DENIED/ABANDONED PROJECTS," and "LAND DEVELOPMENT AND PLANNING STUDIES AND REPORTS." *These records may have archival value.*

Land Development and Planning Studies and Reports

Schedule Identifier: GS1-SL

Item Number: #353

Retention: Permanent. / *Offer to University of Florida Archives for review.*

This record series documents local government land use and development planning. The series may include, but is not limited to, feasibility studies, reports, analyses, projections, graphic material, and related planning documents produced by outside consultants or in-house staff. The records may relate to comprehensive planning, capital improvements, land use and open space, economic development, housing renewal, regional intergovernmental cooperation, transportation, traffic engineering, transit systems, airports, long range forecasts, and other aspects of local government planning. See also "COMPREHENSIVE MASTER PLANS: ADOPTED," "COMPREHENSIVE MASTER PLANS: ADOPTED (SUPPORTING DOCUMENTS)," "LAND DEVELOPMENT AND PLANNING PROJECT FILES," "LAND DEVELOPMENT AND PLANNING PROJECT FILES: DENIED/ABANDONED PROJECTS" and "LAND DEVELOPMENT AND PLANNING PROJECT FILES: PRELIMINARY DRAWINGS/DRAFTS." *These records may have archival value.*

Minutes: Official Meetings

Schedule Identifier: GS1-SL

Item Number: #32

Retention: Permanent. / *Offer to University of Florida Archives for review.*

This record series consists of the official record of official meetings, defined in Section 286.011(1), Florida Statutes, Public meetings and records, as "All meetings of any board or commission of any state agency or authority or of any agency or authority of any county, municipal corporation, or political subdivision, except as otherwise provided in the Constitution, including meetings with or attended by any person elected to such board or commission, but who has not yet taken office, at which official acts are to be taken..." The series may include verbatim transcripts or minutes summarizing issues addressed, actions taken, and decisions made. The series may also include agendas and background materials used as reference documentation for agenda items; these should be included when they are necessary to understand the minutes. For documentation of the logistics/planning of the meetings such as venue information or directions, travel itineraries, and reservations and confirmations, use "ADMINISTRATIVE SUPPORT RECORDS." See also "CABINET AFFAIRS FILES," "MINUTES: OFFICIAL MEETINGS (PRELIMINARY/AUDIO RECORDINGS/VIDEO RECORDINGS)," "MINUTES: OFFICIAL MEETINGS (SPECIAL DISTRICTS/AGENCY SUPPORT ORGANIZATIONS/NON-POLICY ADVISORY BOARDS)," "MINUTES: OFFICIAL MEETINGS (SUPPORTING DOCUMENTS)" and "MINUTES: OTHER MEETINGS." *These records may have archival value.*

Minutes: Official Meetings (Special Districts / Agency Support Organizations / Non-Policy Advisory Boards)

Schedule Identifier: GS1-SL

Item Number: #424

Retention: 10 anniversary years. / Offer to University of Florida Archives for review.

This record series consists of the official record of official meetings of special districts established by local ordinance or resolution, of agency citizen support organizations or direct support organizations, or of agency advisory boards that do not establish policy, rules or guidelines. Official meetings are defined in Section 286.011(1), Florida Statutes, Public meetings and records, as "All meetings of any board or commission of any state agency or authority or of any agency or authority of any county, municipal corporation, or political subdivision, except as otherwise provided in the Constitution, including meetings with or attended by any person elected to such board or commission, but who has not yet taken office, at which official acts are to be taken..." The series may include verbatim transcripts or minutes summarizing issues addressed, actions taken and decisions made. The series may also include agendas and background materials used as reference documentation for agenda items; these should be included when they are necessary to understand the minutes. For documentation of the logistics/planning of the meetings, such as venue information or directions, travel itineraries, and reservations and confirmations, use "ADMINISTRATIVE SUPPORT RECORDS." See also "CABINET AFFAIRS FILES," "MINUTES: OFFICIAL MEETINGS," "MINUTES: OFFICIAL MEETINGS (PRELIMINARY/AUDIO RECORDINGS/VIDEO RECORDINGS)," "MINUTES: OFFICIAL MEETINGS (SUPPORTING DOCUMENTS)" and "MINUTES: OTHER MEETINGS." ***These records may have archival value.***

Minutes: Other Meetings

Schedule Identifier: GS1-SL

Item Number: #33

Retention: 1 anniversary year after date of meeting. / Offer to University of Florida Archives for review.

This record series consists of minutes and all supporting documentation from meetings that are not official meetings as defined in Section 286.011(1), Florida Statutes, Public meetings and records. ***These records may have archival value.***

News Releases

Schedule Identifier: GS1-SL

Item Number: #34

Retention: 90 days. / Offer to University of Florida Archives for review.

This record series consists of news releases distributed by the agency. See also "PUBLIC INFORMATION FILES," "PUBLICATION PRODUCTION RECORDS" and "TRANSITORY MESSAGES." ***These records may have archival value.***

Organization Charts

Schedule Identifier: GS1-SL

Item Number: #126

Retention: Retain until obsolete, superseded, or administrative value is lost (OSA). / Offer to University of Florida Archives for review.

This record series consists of organizational charts that show lines of authority and responsibility agency wide, within and between the various departments of the agency. See also "DIRECTIVES/POLICIES/PROCEDURES." ***These records may have archival value.***

Public Information Files

Schedule Identifier: GS1-SL

Item Number: #128

Retention: 90 days. / Offer to the University of Florida Archives for review.

This record series documents an agency's efforts to disseminate information to the public about its programs and services through such activities as speeches, presentations, exhibits, displays, social media involvement and other activities. The series may include, but is not limited to, speeches (including outlines, speaking points and drafts), photographs or other illustrations used in agency publications or displays, applicable social media posts, and examples of brochures, handouts, or other items meant for public distribution. NOTE: Stocks of agency publications (e.g., brochures, pamphlets, handbooks, etc.) are not included in this series. See also "NEWS RELEASES" and "PUBLICATION PRODUCTION RECORDS." ***These records may have archival value.***

Public Program / Event Records

Schedule Identifier: GS1-SL

Item Number: #238

Retention: 5 fiscal years after completion of contract or program/event, whichever is later / Offer to University of Florida Archives for review.

This record series consists of files documenting agency provided or sponsored events or programs available to the public or segments of the public, such as parks and recreation programs, arts and crafts classes, sports clinics, summer/day camps, animal obedience classes, library programs, parenting classes, CPR training, and any other events the public can participate in or attend. The files may include, but are not limited to, copies of contracts or agreements, participant or performer information, program details and arrangements, photographs, audio and/or video recordings, and completed registration forms providing such information as registrant's name, address, telephone number(s), date of birth, parent/guardian information, emergency contact information, current medications, allergies, physician information, medical release and liability release. The series may also include other documentation, such as sign in/out forms, parent/guardian authorizations and other related records. These records relate both to events staged by the agency and to events staged by a contractor or vendor on behalf of the agency.

Resolutions

Schedule Identifier: GS1-SL

Item Number: #297

Retention: Permanent. / Offer to University of Florida Archives for review.

This record series consists of formal expressions of opinion, intention or decision by a governing body concerning administrative matters before the governing body or relating to the governing body's areas of responsibility. See also "RESOLUTIONS: SUPPORTING DOCUMENTS," "CHARTERS/AMENDMENTS/BYLAWS/CONSTITUTIONS," "DIRECTIVES/POLICIES/PROCEDURES," "ORDINANCES," and "PROCLAMATIONS." ***These records may have archival value.***

Resolutions: Special Districts / Agency Support Organizations / Non-Policy Advisory Boards

Schedule Identifier: GS1-SL

Item Number: #429

Retention: 10 anniversary years. / Offer to University of Florida Archives for review.

This record series consists of formal expressions of opinion, intention or decision by a special district established by local ordinance or resolution, agency support organization or non-policy advisory board concerning administrative matters before that body or relating to its area of responsibility. ***These records may have archival value.***

Salary Comparison Reports

Schedule Identifier: GS1-SL

Item Number: #49

Retention: 1 fiscal year. / Offer to University of Florida Archives for review.

This record series consists of reports compiled for reference purposes to provide employees with a method of comparing their job descriptions, educational requirements, and salaries with similar positions within the agency

and in outside agencies. See also "POSITION DESCRIPTION RECORDS" and "SALARY SCHEDULES." ***These records may have archival value.***

Salary Schedules

Schedule Identifier: GS1-SL

Item Number: #240

Retention: 10 fiscal years. / ***Offer to University of Florida Archives for review.***

This record series consists of a list or report indicating the salary classification/range for each position or pay grade in an agency. See also "POSITION DESCRIPTION RECORDS" and "SALARY COMPARISON REPORTS." ***These records may have archival value.***

Student Newspapers

Schedule Identifier: GS5

Item Number: #30

Retention: Permanent. / ***Offer to University of Florida Archives for review.***

This record series consists of newspapers produced and distributed by student organizations officially recognized by the school. **NOTE:** Stocks of student publications are considered duplicates under this series. See also "STUDENT NEWSPAPERS: SUPPORTING DOCUMENTS." ***These records may have archival value.***

Subject / Reference Files

Schedule Identifier: GS1-SL

Item Number: #373

Retention: Retain until obsolete, superseded, or administrative value is lost (OSA). / ***Offer to University of Florida Archives for review.***

This record series may contain copies of correspondence, reports, memoranda, studies, articles, or other documentation regarding topics of interest to or addressed by an agency or program unit and maintained as a reference resource for the convenience of staff. See also "ADMINISTRATOR RECORDS: AGENCY DIRECTOR/PROGRAM MANAGER." ***These records may have archival value.***

Training Material Records

Schedule Identifier: GS1-SL

Item Number: #147

Retention: Retain until obsolete, superseded, or administrative value is lost (OSA). / ***Offer to University of Florida Archives for review.***

This record series consists of materials used in training, such as films, slide presentations, manuals, workbooks, and other related items. Check with applicable training agencies (i.e., state and federal agencies, etc.) for retention requirements. This record series does not include records documenting training of individuals. ***These records may have archival value.***