

**DEPARTMENT OF GENERAL SERVICES**  
**Records Management Division**

**RECORDS RETENTION AND DISPOSAL SCHEDULE**

**MARYLAND STATE DEPARTMENT OF EDUCATION FOR THE LOCAL EDUCATION AGENCIES (1)**

AGENCY		DIVISION
Item No.	Description	Retention
	Supercedes previous section of 582A	
1	Annual Capital Budget Request as submitted to PSCP Requests for Planning Approval (102.1) Requests for Construction Funding (102.2) Future Project Requests (102.3) Summary of Current and Five Year Program Requests (102.4) Supporting documentation as required. For example : local government approval, letters from MSDE re educational programs, floor plans, feasibility studies	5 years, then destroy
2	Site Site Analysis Report and required attachments (104.1) Environmental Assessment (104.2) Deed	Retain until the board of education ownership is terminated, then transfer to new owner.
3	Record of Architect/Engineer (103.1) with Executed Standard Form of Agreement with Architect/Engineer	3 years, then destroy
4	Educational Specifications Documents (letter and attachments)	3 years, then destroy
5	Schematic Design Submission Schematic Design (202.1) with attachments	3 years, then destroy**
6	Design Development Documents Design Documents (302.1) Life Cycle Cost Analysis Summary (302.2) Design Development Document Analysis (302.3) Cost Estimate Summary and Worksheet (302.4)	3 years, then destroy**
7	Construction Documents Construction Documents (303.1) Construction Document Analysis (303.2) Cost Estimate Summary and Worksheet (302.4)	Retain until the board of education ownership is terminated, then transfer to new owner.**
8	Approval of Construction Contract Award (303.3) Bid tabulation Board of Education approval	Completion of PSCP audit, then destroy
9	Owner/Contractor/CM Agreement Agreement (303.4) with attachment Performance Bond (303.4) with attachment	Completion of PSCP audit, then destroy
10	Change Orders (305.1) with attachment	Completion of PSCP audit, then destroy

DEPARTMENT OF GENERAL SERVICES  
Records Management Division

RECORDS RETENTION AND DISPOSAL SCHEDULE

MARYLAND STATE DEPARTMENT OF EDUCATION FOR THE LOCAL EDUCATION AGENCIES

AGENCY		DIVISION
Item No.	Description	Retention
	Supersedes previous section of 582A	
11	School Construction Monthly Financial Report Request for Payment to Contractors (306.1) Request for Reimbursement to LEA (306.2) Monthly Financial Report (306.3) Standard Monthly Contractor's Requisition (306.4)	Completion of PSCP audit then destroy
12	Request for Final Payment Monthly Financial Report Summary (306.5) Close-out Cost Summary (306.6)	Retain until the board of education ownership is terminated, then transfer to new owner.
13	Request/Report of Change in Status of School Facilities (501.1) with attachments	Retain until the board of education ownership is terminated, then transfer to new owner.
14	Educational Facility Master Plan	3 years, then destroy

Schedule Approved by Department, Agency, or Division Representative

Schedule Authorized by Hall of Records Commission

8/25/99 *John Steffe* Exec. Director  
Date Signature Title

SEP 14 1999 *Edward C. Pappas*  
Date State Archivist

ps 943

(1) This retention schedule applies to all contracts for all capital projects entered into by boards of education whether State or locally funded.

Project specific documents retention should begin from the date of completion and acceptance of the project. Form numbers are for reference only.

\*\*May be linens, copies, microfilm or CADD records, including "AS-BUILT" drawings