

**GRS5 Daily Operations Records**

**GRS5.1 General Correspondence and Memoranda**

Routine written communications created or received in the normal course of agency business. May include, but is not limited to, referral letters, requests for information pertaining to the agency, requests for publications that the agency provides to the public, requests for the services provided by the agency, any other correspondence that does not affect agency policy or procedures, and routine internal memos (unless specific to agency policy or procedures). Records may be arranged chronologically, by subject, or in some other order that is meaningful to the agency. This series does not include correspondence that involves personnel decisions, allegations of misconduct, the agency's facilities, complaints, or the agency's budget.

*Retention:* Retain one (1) year.

*Note: When a written communication initiates a substantive transaction that requires creating a separate file, it becomes part of another appropriate series, rather than the General Correspondence series.*

*Note: For Access to Public Records Act (APRA) requests as defined by R.I. Gen. Laws § 38-2, see GRS6.10.*

*See also: Executive Records - Correspondence and Memoranda - GRS1.1.*

**GRS5.2 Phone Logs**

Includes all records of incoming and outgoing calls to and from agency personnel.

*Retention:* Retain one (1) year.

**GRS5.3 Mail Logs**

Includes all records of incoming and outgoing mail to and from agency personnel.

*Retention:* Retain one (1) year.

**GRS5.4 Surveys/Questionnaires**

Surveys/questionnaires conducted by an agency or municipality in response to issues identified as significant to operations or policy, or to gather information. Includes forms distributed by the agency or municipality that were filled out and returned and the data compilations from the survey/questionnaire.

**a) Completed survey/questionnaire forms**

*Retention:* Retain one (1) year.

**b) Compiled data**

Includes compilations of data that were created from surveys/questionnaires conducted or distributed by the agency or municipality.

*Retention:* Retain until report is compiled and issued. Before disposal of Compiled Data, consult State Archives to review for historical value.

**GRS5.4 Surveys/Questionnaires (continued)**

**c) Reports and recommendations**

Reports, summaries, and recommendations issued, instituted, or arising from surveys/questionnaires.

*Retention:* Permanent.

**d) Surveys unrelated to agency mission or programs**

May include compiled data and reports.

*Retention:* Retain until of no further administrative value.

*See also: Executive Records - Special Plans, Publications, Studies and Report - GRS1.6.*

**GRS5.5 Contact Lists and Directories**

Includes mailing lists, directories, and rosters compiled by the agency for contact purposes.

*Retention:* Retain until superseded or of no further administrative value.

**GRS5.6 Scrapbooks/Photo Albums/Clippings**

Includes records of activities and events, official in nature, and relating to the agency, usually compiled by staff members, which may contain photographs, announcements, clippings, advertisements, and other items reporting the event, activity, or program.

*Retention:* Permanent.

*Note: Newspaper clippings should be photocopied and originals discarded.*

**GRS5.7 Public Relations Records**

Includes records relating to public relations activities of the agency including, but not limited to, press releases, newsletters, brochures, audiovisual materials, and supporting documentation.

**a) Publicity and press releases**

Includes newsletters, press releases, brochures, and other items designed to inform the public of the agency's mission, programs, projects, events, or activities.

*Retention:* Retain one copy of each permanently.

**b) Supporting documentation**

Includes supporting documentation, such as drafts and research notes, used in the preparation of newsletters, press releases, brochures, and other items created for public relations purposes.

*Retention:* Retain until of no further administrative value.

**GRS5.7 Public Relations Records** (continued)

**c) Audio/visual records**

Includes audio, video, and photographic items in analog or digital format.

Retention: Permanent.

*See also: Information Management Records - Website Documentation - Web page content - GRS7-X.Xc.*

**GRS5.8 Daily and Weekly Reports**

Internally generated reports on routine agency activities created on a daily and/or weekly basis. These reports and returns may be used for internal purposes or be shared with other municipal departments and state agencies. This does not include reports that are part of another series (such as reports on receipts and expenditures, which fall under the Fiscal section of this schedule, or vehicle use reports, which fall under GRS4.6).

Retention: Retain one (1) year.

**GRS5.9 Monthly, Quarterly, and Periodic Reports**

Internally generated reports on agency activities created for any time period of time greater than weekly, but less than yearly/annual. These reports may be used for internal purposes or may be shared with other municipal departments or state agencies. This does not include reports that are part of another series.

Retention: Retain three (3) years.

*Note: For Annual Reports, see Executive Records - Statistical Records and Annual Reports - GRS1.5.*

**GRS5.10 Complaints**

Complaints against agency about problems involving delivery of services, job performance of employees, personal interactions with the agency and/or any other difficulties. May include, but are not limited to, letters of complaint, notes from telephone conversations, and agency responses.

Retention: Retain three (3) years.

*Note: When this record series appears on agency specific schedule, retain for whichever period is the longer of the two.*

**GRS5.11 Reference Material**

Documents used by staff as sources for reference. May include, but is not limited to, reference books, brochures, published reports, manuals, periodicals, material from websites, and clippings.

Retention: Retain until of no further administrative value.

**GRS5.12 Professional Organization Membership Files (Added 4/2009)**

Employees of state agencies and local government agencies sometimes join professional organizations and attend meetings and conferences of these organizations. These records document this professional involvement. They may include, but are not limited to, publications of the organization, handouts distributed at conferences and notes taken at conferences.

*Retention:* Retain until of no further administrative value.

*Note:* No notification required for destruction

**GRS5.13 Outreach and Training Records (New series added 10/2009)**

Agencies, as part of their programs, sometimes offer training in certain aspects of their areas of responsibility and expertise. Training and outreach activities include lectures, workshops, and presentations. Documentation of these activities may include, but are not limited to, pamphlets, brochures, guides, guidelines, lecture notes/talking points, evaluation forms and compiled data, electronic presentations and web-based workshops (PowerPoint, webinar etc.).

**a) Evaluation Forms and Compiled Data**

*Retention:* Retain until of no further administrative value.

**b) Electronic Presentations**

*Retention:* Retain each substantive version permanently.

**c) All Other Records**

*Retention:* Retain one copy as a permanent record.

*See also: GRS5.7 Public Relations Records*

**GRS5.14 Staff Meeting Minutes (New series added 11/2010)**

Periodically, agency staff come together to discuss internal office matters. These records document those meetings. The files include not only meeting minutes, but also any other records used for reference at the meetings and other documents generated as a result of the meetings.

*Retention:* Retain three (3) years.

*Note: For meeting of entire agency or committees within an agency that are more substantive in nature and involve policymaking, see GRS1.7 Meeting Minutes.*

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