



**Pharr Literacy Project, Inc.**  
**Records Management and Records Retention**

- A. Purpose** The purpose of the Records and Information Management and Retention Policy is to provide procedures for the management and retention of PLP records.
- B. Statement Related to an Institutional Records and Information Management and Retention Policy** - PLP recognizes the need for orderly management and retrieval of all official records and for a documented records retention and destruction schedule congruent with all state and federal laws and regulations. All official records (paper, microform, electronic, or any other media, including e-mail) will be retained for the minimum periods stated in the PLP's Records Retention Schedule in compliance with *Texas Government Code*, Chapter 441. After a specified period of time, official records must be disposed of in a manner that is consistent with, and systematically carried out in accordance with, prescribed records and information management guidelines and procedures. Duplicate files, duplicate copies, library materials, and stocks of obsolete forms or pamphlets originally intended for distribution are not considered to be official records or record copies. Duplicates or nonrecord convenience copies should be destroyed when they cease to be useful and should never be kept longer than the official record copy.
- C. Records Retention Schedule** – PLP's Records Retention Schedule provides a list of official records and prescribes the periods of authorized retention. The schedule may be revised periodically to include a newly created record series, to change retention periods, or to delete a record series no longer useful. Appropriate approval procedures must be followed and completed before any revisions would become effective. A copy of the Records Retention Schedule may be obtained from PLP's Central Office. All records will be kept for the minimum periods listed in the Records Retention Schedule. Notwithstanding such minimum retention periods, all records must be maintained until all required audits are completed and should be retained beyond the listed retention periods when there is a probability of litigation, either involving the records or requiring their use. Vital records should be identified in the Retention Schedule. Archival documents should be identified in the Retention Schedule and maintained appropriately.
- D. Destruction of Records** - No PLP records may be destroyed without permission from the board of directors. A PLP record may not be destroyed if any litigation, claim, negotiation, audit, open records request, administrative review, or other action involving the record is initiated before the expiration of the retention period for the record set in the approved institutional Records Retention Schedule. If no action as described above has been taken, records may be destroyed in accordance with the approved retention periods shown in the Records Retention Schedule. Prior to disposal of official records, all PLP records and information management regulations and policies must be followed. PLP records not listed on the approved Records Retention Schedule may be destroyed after receiving approval by the board of directors.



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- G. Review** - This policy will be reviewed by the board of directors every five years or as federal, state or local laws require.