How to Create a Departmental Records Retention Schedule at Swarthmore College

1. Contact the College Archivist/Records Manager, David Obermayer, email doberma1@swarthmore.edu, telephone: 610-328-8540.
2. Along with the College Records Manager determine if a records retention schedule has previously been drafted for your department. If so, review the old schedule or draft.
3. Set up a meeting with the College Records Manager and key stakeholders within your department (department heads, administrative assistants or coordinators etc. whoever handles these records regularly.)
4. During this meeting, as per Swarthmore College's Records Management Policy, a departmental custodian of records will be appointed. They will be responsible for making sure the records retention schedule is carried out throughout the department.
5. The group will also identify all records that the department generates and is responsible for, the length of time these records need to be retained and what their final desposition is (destruction through a shredding service, transfer to the College Archives, digital purge etc.)
6. This information will be entered into the record retention schedule template.
7. When the schedule is complete and accurately reflects the retention and desposition for all records generated by the department the College Records Manager will take the schedule to the Information Security Committee for approval.
8. Once the schedule is approved by the Information Security Committee it may be sent to the Office of General Counsel for final approval and risk assessment.
9. When the schedule has been approved by the Information Security Committee and reviewed by the Office of General Counsel, if applicable, it will become the official records retention schedule for the department.
10. The records retention schedule should be reviewed annually, after approval, to see if any revisions are needed.

David Obermayer   12/13/2019