THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

Records Management Program

CB# 3926, Wilson Library
Chapel Hill, NC 27514-8890
(919) 962-6402  FAX: (919) 962-6401

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TO: Deans, Directors, and Department Heads

FROM: H. Franklin Holt, University Records Manager
      Susan Ballinger, Acting University Archivist

RE: Handling Your Unit’s Records (paper and electronic)

Records Schedules: We would like to remind you of the need to handle your
unit’s records - both paper and electronic - in ways that preserve those
materials important to the University while complying with the N.C. State Public
Records Act. This is done by developing a Records Retention and Disposition
Schedule for your unit with the help of our Records Management Program. This
schedule will then be approved by the Department of Cultural Resources in
Raleigh. If you do not have such a schedule for your unit, please call the
Records Management Program at 962-6402.

The materials listed below are examples of organizational records that must be
saved and transferred to University Archives in accordance with an approved
Records Retention and Disposition Schedule:

- Annual reports of your unit
- Your correspondence as Department Head
- Minutes from committee meetings
- Reports from curriculum revision efforts
- Organizational changes of your unit

Note that other items also may need to be saved as listed in your unit’s
Retention and Disposition Schedule.

Faculty Who Leave: Let us also mention the need to handle properly the records
of faculty and EPA non-faculty employees who leave the University for any
reason. Organizational records (see examples listed above) should be referred
to University Archives for screening. Personal papers of faculty members, if no
longer desired by the individuals or their families, may be referred to the
Manuscripts Department in Wilson Library for review. Departing faculty members’
final examination papers, their grade records for individual students from the
most recent year, and their class grade books for the last three years should be
left with a designated person within your department/school.

We appreciate your help in preserving the important records of the University.
Do note that the reverse is true, also, in that we need to dispose properly of
records that are no longer needed. If we in Records Management and University
Archives can be of assistance to you or your unit, please do not hesitate to
give us a call (962-6402).