

# Multnomah Education Service District

Code: **DJ/DJC-AR(5)**  
 Adopted: 1/26/09  
 Amended:  
 Reviewed: 11/16/10

## Purchasing Procedures - Records Retention

Records related to public contracting activities must be retained by MESD for certain set minimum periods of time. MESD follows the record retention schedule established by the State Archivist and contained in OAR 166-400-0010 through 166-400-0065. Records and their retention periods are current as of the adoption of the administrative regulation.

**(1) Contracts and Agreements.**

- a. Amendments
- b. Exhibits
- c. Addenda
- d. Contract review records
- e. Correspondence relating to a contract (emails, faxes, letters, memos, etc.)
- f. Documentation
- g. Contract itself

<i>Retention rules for (1)(a)-(g):</i>		
i.	Contracts and agreements documenting building construction, alterations or repair.	• 10 years after substantial completion. <sup>1</sup>
ii.	Other contracts and agreements.	• 6 years after expiration.

**h. Work orders**

<i>Retention rules for (1)(h):</i>		
i.	Work completed by school district personnel.	• 1 year.
ii.	Work completed by outside vendors.	• 3 years.

**i. Signature authorization records**

<i>Retention rule (1)(I):</i>		
i.	All signature authorization records.	• 6 years after authority is superseded or expired.

**j. Contractor liability insurance verification records**

**k. Contractor performance bond records**

<i>Retention rules for (1)(j)-(k):</i>		
i.	Related to MESD improvement project.	• 10 years after substantial completion. <sup>1</sup>
ii.	All other records.	• 6 years after expiration.

1. Vendor records

<i>Retention rule for (1)(l):</i>	
i. Vendors and suppliers providing goods and services to MESD. (Examples: name and address; description of goods or services provided; catalogs; packing slips; price quotes; related correspondence and documentation).	• Until superseded or obsolete.

(2) **Purchasing Records.** Records documenting the purchase of goods and services.

- a. Purchase orders and requests
- b. Purchase authorizations
- c. Requisitions
- d. Contract release orders
- e. Price agreements
- f. Material and cost specifications
- g. Receipt and delivery documentation
- h. Related correspondence and documentation

<i>Retention rules for (2)(a)-(h):</i>	
i. Involves expenditure of federal funds.	• 5 years after final or annual expenditure report accepted.
ii. All other records.	• 3 years.

(3) **Leases.** Records that document the lease of property to or from MESD, typically for office space, equipment, machinery, real estate, or facilities.

- a. Lease
- b. Rental agreements
- c. Amendments
- d. Addenda
- e. Authorizations
- f. Related correspondence and documentation

<i>Retention rule for (3)(a)-(f):</i>	
	• 6 years after expiration.

(4) **Public Notice.** Records documenting the publicizing, evaluation, and awarding of bids.

- a. Requests for bids, Requests for proposals, Requests for quotes
- b. Bid exemption documents
- c. Bid and quote lists
- d. Notices of bid opening and award
- e. Comparison summaries, etc.

<i>Retention rules for (4)(a)-(e):</i>	
i. Accepted bids.	• 10 years after substantial completion. <sup>1</sup>
ii. Other accepted bids.	• 6 years after bid awarded or canceled.
iii. Rejected bids and exemptions.	• 2 years.

**Specific Types of Contracts:**

- (5)(A) Capital Construction Contracts.** Records documenting the planning, administration and implementation of current and potential capital construction projects, including projections of need for projects.
- a. Contract change orders
  - b. Bid documentation
  - c. Building reports
  - d. Contracts and agreements with architects, engineers, consultants, vendors and contractors
  - e. Insurance reports
  - f. Payment schedules
  - g. Certificates of occupancy
  - h. Other, see OAR 166-400 - 0020(4) for detail

<i>Retention rules for (5)(A)(a)-(h):</i>	
i. Contracts documenting building construction, alterations, or repair.	• 10 years after substantial completion. <sup>1</sup>
ii. All other records.	• Life of the structure.

- (5)(B) Equipment.**
- a. Maintenance agreements
  - b. Contracts
  - c. Lease agreements

<i>Retention rules for (5)(B)(a)-(c):</i>	
i. Generally:	• 2 years after disposal of equipment.
ii. See also the lease section (section 3) of this document	

- (5)(C) Computer System Maintenance Records.** Records related to system or component repair or service.
- a. Warranties
  - b. Service contracts

<i>Retention rule for (5)(C)(a)-(b):</i>	
	• Life of the system or component.

- (5)(D) Property Records.** Records that document the purchase, ownership and sale of land or buildings by MESD.
- a. Titles and deeds
  - b. Title search records
  - c. Property descriptions
  - d. Title insurance policies and forms
  - e. Easements
  - f. Right of ways
  - g. Appraisals
  - h. Records of sale
  - i. Related documentation and correspondence

<i>Retention rule for (5)(D)(a)-(I):</i>	
	<ul style="list-style-type: none"> <li>• 3 years after the property is no longer owned by MESD.</li> </ul>

**(6) Legal.**

- a. Bid protests
- b. Contract disputes

<i>Retention rule for (6)(a)-(b):</i>	
	<ul style="list-style-type: none"> <li>• 10 years after final disposition of the case.</li> </ul>

**(7) Grant Records.**

- a. Applications
- b. Project proposals
- c. Summaries
- d. Activities
- e. Budgets
- f. Exhibits
- g. Award Notification
- h. Grant evaluation records and recommendations
- i. Administration records
- j. Allocation of funds
- k. Contracts
- l. Monitoring progress and achievement
- m. Inventories
- n. Financial reports (including accounting and audit)
- o. Expenditure reports
- p. Correspondence and documentation

<i>Retention rules for (7)(a)-(p):</i>	
i. Final reports from significant grants to MESD.	<ul style="list-style-type: none"> <li>• Permanently</li> </ul>
ii. Reports dealing with the purchase and/or disposal of real property.	<ul style="list-style-type: none"> <li>• 10 years after substantial completion; <b>or</b></li> <li>• 3 years after final disposition; <b>or</b></li> <li>• As specified in agreement, <b>whichever is longer.</b></li> </ul>
iii. Other grant records.	<ul style="list-style-type: none"> <li>• 3 years after annual or final expenditure report is submitted and approved; <b>or</b></li> <li>• As specified in agreement, <b>whichever is longer.</b></li> </ul>
iv. Unsuccessful grant applications.	<ul style="list-style-type: none"> <li>• 1 year after rejection or withdrawal.</li> </ul>

NOTE: Some records within these categories may themselves specifically state they must be retained for periods longer than required by the State Archivist's rules. Legal Services may request certain records be held for longer periods.

- 1. Substantial completion generally means the date the building may be used or occupied for its intended purpose