

DEPARTMENT OF PUBLIC INSTRUCTION  
ASSISTANT STATE SUPERINTENDENT FOR AUXILIARY SERVICES  
DIVISION OF SCHOOL FACILITY SERVICES  
PLANT OPERATION SECTION

Records Retention and Disposition Schedule

The Records Retention and Disposition Schedule and retention periods governing the records series listed herein are hereby approved. In accordance with the provisions of Chapters 121 and 132 of the General Statutes of North Carolina, it is agreed that the records of the

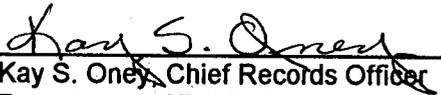
PLANT OPERATION SECTION

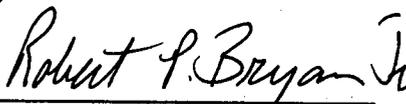
do not and will not have further official use or value for administrative, research, or reference purposes after the respective retention periods specified herein. The N.C. Department of Cultural Resources consents to the destruction or other disposition of these records in accordance with the retention and disposition instructions specified in this schedule. However, records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule. Public records including machine readable records not listed in this schedule are not authorized to be destroyed. The

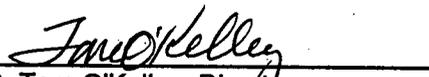
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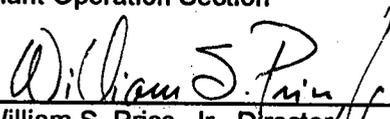
agrees to destroy, transfer or dispose of records in the manner and at the times specified herein. This schedule is to remain in effect until superseded.

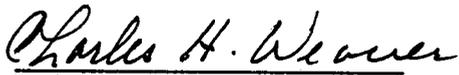
APPROVAL RECOMMENDED

  
Kay S. Oney, Chief Records Officer  
Department of Public Instruction

  
Robert P. Bryan, Chief Consultant  
Plant Operation Section

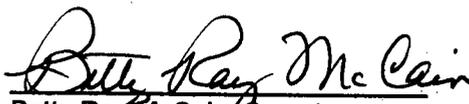
  
D. Tom O'Kelley, Director  
Division of School Facility Services

  
William S. Price, Jr., Director  
Division of Archives and History

  
Charles H. Weaver, Assistant State  
Superintendent for Auxiliary Services

APPROVED

  
Bob R. Etheridge, State Superintendent  
Department of Public Instruction

  
Betty Ray McCain, Secretary  
Department of Cultural Resources

February 18, 1994

HFH

## ... ABOUT THIS RECORDS DISPOSITION SCHEDULE ...

This records disposition schedule lists the records maintained in your office as reported to the Division of Archives and History on the date indicated. It lists all records, whether they are to be destroyed in your office or transferred to the State Records Center, and provides a brief description of each group (following the identification number) and instructions for their legal disposition (following the words "DISPOSITION INSTRUCTIONS"). Records should never be arbitrarily destroyed on the basis of personal opinion but only on the basis of a firm schedule. The disposition instructions contained herein provide that schedule and the legal procedures for records management activities in your agency.

Authority for this schedule, and the disposition instructions therein, is contained in Chapters 121 and 132 of General Statutes of North Carolina. Compliance with the disposition instructions listed herein will help ensure conformity with these laws and that records of continuing value are retained and those no longer of value are destroyed. Procedures to be followed in applying this schedule are explained in the N.C. Administrative Code, Title 7, Chapter 4, Section 500. Errors and omissions do not invalidate this schedule or render it obsolete. All provisions of this schedule remain in effect until it is officially superseded.

Supervisors or other responsible office personnel, acting through their Records Officers, are requested to notify the Records Services Branch whenever corrections, additions, or deletions in the records schedule should be made. Records Services Branch personnel will then amend this schedule in order to ensure that it remains complete and accurate and is in compliance with federal and state laws and regulations.

The Records Services Branch will provide, upon request, the following assistance to agencies in the maintenance and operation of records schedules: amendment or update of existing schedules; supply and delivery of boxes, tape, and labels for records scheduled to be transferred to the State Records Center; pickup of records to be transferred; reference service on records stored in the State Records Center; and advice and technical assistance in solving records management problems. There is no charge for these services.

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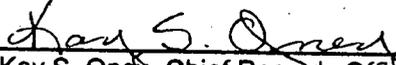
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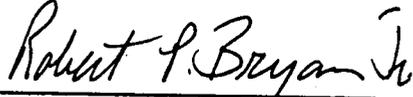
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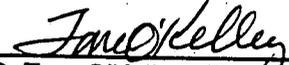
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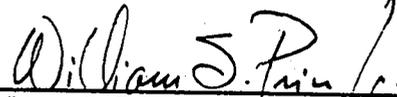
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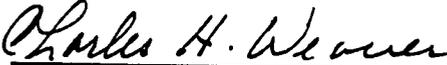
APPROVAL RECOMMENDED

  
Kay S. Oney, Chief Records Officer  
Department of Public Instruction

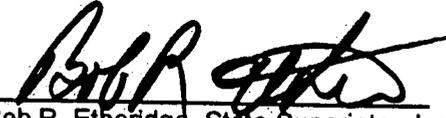
  
Robert P. Bryan, Chief Consultant  
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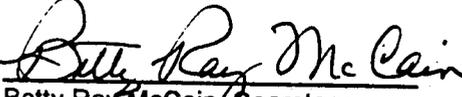
  
D. Tom O'Kelley, Director  
Division of School Facility Services

  
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Charles H. Weaver, Assistant State  
Superintendent for Auxiliary Services

APPROVED

  
Bob R. Etheridge, State Superintendent  
Department of Public Instruction

  
Betty Ray McCain, Secretary  
Department of Cultural Resources

February 18, 1994

This schedule was modified to  
comply with the provisions of the  
General Schedule for State Agency Records,  
effective October 1, 2000  
Remaining items retain the  
original date shown below.

HFH

**DEPARTMENT OF PUBLIC INSTRUCTION  
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PLANT OPERATION SECTION**

**ITEM 21433. CORRESPONDENCE FILE.**

Correspondence and memorandums prepared by section consultants concerning energy conservation suggestions/recommendations.

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends.

**ITEM 21435. THERMAL ENERGY SPECIAL PROJECTS FILE.**

Reference copies of records concerning thermal-energy projects for public school buildings throughout the state. File includes correspondence and reports regarding studies and proposals, surveys, specifications, and other related records.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center when administrative value ends. Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the Archives.

**ITEM 21436. WASTE WATER TREATMENT FILE.**

Reference copies of records concerning public school waste water treatment facilities. File includes correspondence, applications for permits, blueprints, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends.

**ITEM 21437. COMPUTERIZED ENERGY REPORTING AND MONITORING SYSTEM FILE.**

Reference copies of records concerning the administration of the Computerized Energy Reporting and Monitoring System, a state program designed to monitor energy consumption by public schools and to promote energy conservation. File includes correspondence, memorandums, energy consumption data monthly reports, annual reports, and other related records.

DISPOSITION INSTRUCTIONS: Transfer annual reports to the State Records Center when reference value ends. Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the Archives. Destroy in office energy consumption reports after 2 years. Destroy in office remaining records when administrative value ends.

**ITEM 21441. INSTITUTIONAL BUILDINGS GRANTS PROGRAM FILE.**

Reference copies of records concerning the administration of the Institutional Buildings Grants Program. File includes correspondence, reports, and budget information. (This federally-funded program provides for the remodeling of educational buildings in order to improve energy conservation.)

DISPOSITION INSTRUCTIONS: Destroy in office when administrative value ends.

**ITEM 21442. ENERGY AUDIT REPORTS FILE.**

Records concerning energy conservation inspections conducted by engineers for public schools throughout the state. File includes or concerns heat loss calculations, master building data forms, energy audit reports including recommendations, floor plans, and other related data utilized for administration of Institutional Buildings Grants Program.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center when reference value ends. Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the Archives.

**ITEM 21443. INSTITUTIONAL BUILDINGS GRANTS BILLINGS FILE.**

Records concerning departmental billings of educational facilities for energy audit services under the Institutional Buildings Grants Program. File includes reference copies of invoices, warrants, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office 1 year(s) after released from all audits.

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**ITEM 21444. TIME AND EXPENSE RECORDS FILE.**

Reference copies of time and expense records concerning temporary section employees conducting energy audit reports with private consulting firms. File also includes invoices from consulting firms.

DISPOSITION INSTRUCTIONS: Destroy in office after 1 year.

**ITEM 21448. ENGINEERING FILE.**

Records concerning engineering services performed by section employees for public schools in each county. File includes correspondence, work request forms, reports, reference copies of purchase orders, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office when administrative value ends.

**ITEM 21457. LEADERSHIP POSITION OF MAINTENANCE AND CUSTODIAL PERSONNEL FILE.**

Records concerning state funding of salaries for maintenance supervisors for each county school system. File includes job descriptions, summaries of qualifications, correspondence, workshop attendance certificates, educational course listings, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office when administrative value ends.

**ITEM 21460. MAINTENANCE BEACON ARTICLES FILE.**

Articles submitted by section engineers for the MAINTENANCE BEACON, a monthly tabloid for school maintenance personnel. File also includes correspondence.

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends.

**ITEM 21463. ENERGY CONSERVATION FILE.**

Records concerning energy conservation efforts by each local education agency (LEA). File includes reports, energy conservation plans, and other related records.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center when reference value ends. Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the Archives.

**ITEM 21469. ELECTRICAL LOAD MANAGEMENT PROGRAMS FILE.**

Records concerning the Electrical Load Management Program, which was implemented in 1981 to reduce energy consumption in public schools by managing peak loads. File includes correspondence, recommendations to each participating school, manuals, reports, and other related records.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center when reference value ends. Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the Archives.