

Per Shoreline School District Board Policy 8410 the district records officer shall be responsible for the retention of school district records in accordance with the District and State of Washington records retention schedules.

An effective records management program is vital to the District and requires the cooperation of every school and department. Every employee has an important role to play in protecting the district by creating, using and disposing of records in accordance with State statutes and federal law as well as District policies and procedures. The District Records Officer shall have the authority to dispose of materials after the recommended retention period.

The retention period for files and memoranda is based on operational requirements for each office. Whenever applicable the retention period starts with the Cut-off. "Cut-off" is a term used to indicate files or records may be terminated on a predetermined date. Calendar year records may be cut-off on December 31 and a new file established on January 1; all fiscal year records can be cut-off only upon completion of an action or event, such as termination of a contract, termination of employment, etc. Regardless of the duration of the retention period, records series should be kept in office files after cut-off as long as is necessary to satisfy active references; audit when required, and other operational requirements. Once these factors have been satisfied, the records should be transferred to the district archive records center for the remainder of the retention period.

Types of Records and their Retention

<u>Record Type</u>	<u>Description</u>	<u>Action</u>
Permanent/Historical/Archival	A record that has sufficient legal, fiscal, and/or historical value to be retained indefinitely. A small portion of the District records meet this criteria. Records that provide significant historical value and must be kept permanently.	Retained indefinitely. Transfer to District archives for Permanent retention.
Active	Current year records frequently referenced and considered in active use.	Retain in office of creation.
Semi-Active	Through audit period (usually previous year records).	Retained in retention area of building/department.
Inactive	After audit period, transfer to District Archive Records Retention storage site.	Retained for remainder of retention period.

This guide will provide the most common retention/destruction schedules for use within the District. If the material in question is not on the schedule, contact the district Records Retention Manager or Records Retention Coordinator for clarification. Records may only be destroyed when authorized by the District Records Manager or District Records Coordinator.

The Washington State Archives provides two records retention manuals. The most current retention schedules are on-line at the web addresses noted below. With a keyword or description of the item, you may search the database to locate the Disposition Authorization number and retention period/disposal instructions.

- For general government documents, check the **Local Government Common Records Retention Schedule (CORE)** {Vers. 4.0 (5/2017)}. This link contains records retention information that pertains to various functions of the district, Administrative, Risk Management, Payroll, etc. Typically official public records have a statutory minimum retention of six years.
<http://www.sos.wa.gov/archives/RecordsManagement/UsingtheLocalGovernmentCommonRecordsRetentionScheduleCORE.aspx> .
- **School District and Educational Service Districts Records Retention Schedule** {Vers. 8.2 12/2014}. Contains instruction for more specific items related to school districts (such as fire drill records and field trip forms, etc.).
<http://www.sos.wa.gov/archives/RecordsManagement/Records-Retention-Schedules-for-School-Districts-and-Educational-Service-Districts.aspx>

The District has established the following hierarchy for management of the District's data retention records:

District Records Manager –

- Serves as liaison between District and Washington State Archives
- Represents district to State Local Records Committee
- Reviews and authorizes schedule revisions and updates
- Submits retention revision proposals to WASBO Records Management Committee
- Provides information on physical disposal of eligible records.

District Records Coordinator –

- Coordinates movement and disposal schedules
- Conducts Workshops
- Updates District retention schedules
- Distributes District retention schedules to Principal/Program/Department Managers
- Coordinates schedules
- Assists in schedule revisions and updates
- Provides information to Principal/Program/Department Managers/Building-Department Records Coordinator on physical disposal of eligible records.
- Maintains records management files and schedules for District.

Principal/Program/Department Manager –

- Designates staff member as Building-Department Records Coordinator and establishes schedule of day-to-day responsibilities to the person.
- Ensures Record Coordinator understands responsibilities
- Ensures all staff know who the records coordinator is and what their responsibilities are.

Building/Department Records Coordinator –

- Attends workshop/training/meetings
- Reviews district retention schedules
- Maintains records management files and schedules for building/department level
- Recommends schedule revisions/additions to District-wide Records Coordinator
- Reviews documents for eligibility to be retained or destroyed
- Documents and schedules moving of documents to District Retention Storage facility,
- Documents destruction of eligible records,
- Coordinates Physical disposal with District-wide Records Coordinator.

District Retention Storage

The district Archive Retention Storage facility is located in the Shoreline Center. All records to be retained for the determined retention timelines should be sent to the retention storage facility as outlined within this guide, with few exceptions.

Each school/department may maintain a temporary storage area until the materials are moved to the District retention storage facility. A maximum of two years of data can be maintained in the temporary storage area. At the end of the fiscal year, move prior year records into the temporary storage area and move oldest records from the temporary storage area to the district retention storage facility.

Each department and school should have access to this guide and the Records Retention Schedules at their location and adhere to the retention schedules that apply to their records.

NOTE: If the original documents are being retained in another department, any copies may be destroyed after the audit period is complete (i.e., purchase orders, etc.). All original documents must be retained as outlined in the following procedures.

Procedures:

Please follow these procedures when storing and disposing of public records:

1. When storing public records, clearly mark on the outside of the archive box as shown in example A:
 - a. Fiscal Year

- b. Description of contents. Include same type of records together.
 - c. Box # of ## (i.e. box 1 of 4)
 - d. Date or alphabetic range of records
 - e. Estimated Destruction date based on retention schedule
2. Fill out the Records Storage/Destruction Log (Example B) for the records to be sent to the district retention facility or to be destroyed. Send the original request to the District Retention Coordinator before sending any records to the district retention facility or to be destroyed. The Retention Coordinator will review the log, sign and return a copy to you as authorization to move or destroy the records.
3. The Retention Coordinator will contact the Building Records Coordinator to schedule a time to move or destroy the records.