

I. Purpose of the General Records Retention Schedule

Records are vitally important to the operation of any organization; they serve as the organization's memory and are evidence of past events and the basis for future actions. When created, maintained and disposed of in an orderly and systematic manner, records can be a tremendous asset; when treated in a haphazard and disorderly manner, they can reduce the effectiveness of an organization and increase its costs substantially.

The purpose of a records retention schedule is to provide a plan for managing governmental records by giving continuing authority to dispose of records under Minnesota Statutes 138.17. The basis of any good records management program is the implementation of a well-developed records retention schedule. A retention schedule is a plan for the management of your records.

This School District General Records Retention Schedule establishes minimum retention periods for school district records based on their administrative, fiscal, legal and historical value. It lists record series common to school districts and identifies how long to retain them.

This schedule was originally developed by the Department of Administration and the Minnesota Historical Society in cooperation with the Department of Education and officials from Minnesota school districts. This revised schedule was updated by school district staff, representatives of the Minnesota Association of School Business Officials, Minnesota Association of School Administrators, Minnesota School Board Association, the Department of Administration and the Minnesota Historical Society.

II. Definitions**Record Series Description:**

A record series is a group of records clustered together because they all relate to the same topic and have the same retention period.

Retention Period/Statute:

The retention cited is the minimum amount of time a record must be kept. A number printed alone, e.g. 10, means ten years. The stated retention does not include the year the record originates. For example, if Record A is filed by calendar year and it has a retention of 3 years, the disposal date for 1985 records is January, 1989.

Archival:

If a record type is designated as archival, these records must be retained permanently by the school district, because they have historical value. Records of closed school districts may be transferred to the State Archives for selection and disposition.

Data Practices Classification:

This phrase refers to records classified by the Minnesota Government Data Practices Act or other state or federal laws. The classification system includes: public, private, confidential, nonpublic or protected nonpublic. More than one classification may apply.

Data Practices Statute:

This phrase refers to the statute or law which cites the data practices classification of the record series.

III. Compliance

The School Board directs the Executive Director to adopt the Minnesota Historical Society's School District General Records Retention Schedule in whole or in part and/or establish a records preservation plan and procedure that is in compliance with the Minnesota Historical Society's School District general Records Retention Schedule.

IV. Procedure for Reporting Destruction and Non-Standard Records Situations

Destruction Reporting

After destroying records according to the general schedule, the School will send a report to the Minnesota Department of Administration and the Minnesota Historical Society (M.S. 138.17, Subd. 7). The School will use a "Records Destruction Report" for this purpose. This report may be submitted annually or as records are destroyed.

Records not on the General Schedule

Records not listed on this schedule cannot be destroyed without submitting either an "Application for Authority to Dispose of Records" or a "Minnesota Records Retention Schedule" For ongoing authority to dispose of records not listed on the general schedule, complete a "Minnesota Records Retention Schedule."

Duplicate Records

This retention schedule concerns itself only with the School's official record copy and the retention periods assigned reflect that. It is each school district's responsibility to identify the official record copy and to identify when to destroy any other copies of identical records, after they have lost their legal, fiscal, historical and administrative value. Duplicate copies need not be retained.

V. Partial List of Records to be retained by the school:

A. Records to be retained permanently by the School:

1. Annual Audited Financial Report
2. Annual Report
3. Board Minutes
4. Court Cases and Trial Information
5. Land Purchases, Title, Abstracts, etc.
6. Bond Issues
7. LILA Building Company Records
8. Payroll Register
9. Student Cumulative Records
10. Employee Personnel Files

B. Records to be retained by the School for 7 years:

1. Accounts Payable Files
2. Accounts Payable Canceled Checks
3. Payroll Time Sheets, W-4's
4. Payroll Canceled Checks
5. Receipt Detail
6. Workers Compensation Records
7. Grant Documents

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