

1 **8430 NON-INSTRUCTIONAL OPERATIONS**

2 Records Management

3 The District will retain, in a manner consistent with applicable law and the state’s Rules for Disposition of
4 Local Government Records, such records as are required by law or regulations to be created and/or
5 maintained, and such other records as are related to students, school personnel, and the operations of
6 the schools.

7 For the purpose of this policy, “records” are all documentary materials, regardless of media or
8 characteristics, made or received and maintained by the school unit in transaction of its business. Records
9 include email and other digital communications sent and received.

10 Records may be created, received, and stored in multiple formats, including but not limited to print,
11 microfiche, audio and videotapes, and various digital forms (on hard drives, computer disks and CDs,
12 servers, flash drives, etc.).

13 The Superintendent will be responsible for developing and implementing a records management program
14 for the cataloging, maintenance, storage, retrieval, and disposition of school records. The Superintendent
15 will also be responsible for developing guidelines to assist school employees in understanding the kinds
16 of information that must be saved and those which can be disposed of or deleted. The Superintendent
17 may delegate records-management responsibilities to other school personnel at his/her discretion to
18 facilitate implementation of this policy.

19 All personnel records made or kept by an employer, including, but not necessarily limited to, application
20 forms and other records related to hiring, promotion, demotion, transfer, layoff or termination, rates of
21 pay or other terms of compensation and selection for training or apprenticeship, shall be preserved for 2
22 years from the date the record is made or from the date of the personnel action involved, whichever
23 occurs later.

24 Student records must be permanently kept, and employment records must be kept for 10 years after
25 termination.

26 **Litigation Holds for Electronic Stored Information (ESI)**

27 The School District will have an ESI Team. The ESI Team is a designated group of individuals who
28 implement and monitor litigation holds, a directive not to destroy ESI that might be relevant to a pending
29 or imminent legal proceeding. The ESI Team will include a designated school administrator, an attorney,
30 and a member from the Technology Department. In the case of a litigation hold, the ESI Team shall direct
31 employees and the Technology Department, as necessary, to suspend the normal retention procedure for
32 all related records.

33 **Inspections of ESI**

34 Any requests for ESI records should be made in writing and will be reviewed by the Superintendent or
35 designee, in consultation with an attorney if needed, and released in accordance with Montana public
36 records law.

1 **Delegated Authority**

2 The Board delegates to the Superintendent or designees the right to implement and enforce additional
3 procedures or directives relating to ESI retention consistent with this policy, as needed.

4 Cross Reference:

5 1402 School Board Use of Electronic Mail

6 3600, 3600P Student Records

7 5231, 5231P Personnel Records

8 5450 Employee Electronic Mail and On-Line Services Usage

9 Legal Reference:

10 Montana Secretary of State (Rule for Disposition of Local Government Records)

11 § 2-6-403, MCA Duties and responsibilities

12 § 20-1-212, MCA Destruction of old records by officer

13 § 20-9-215, MCA Records destruction

14 24.9.905 (4), ARM Employment Records

15 Policy History:

16 Adopted on: July 1, 2000

17 Revised on: June 9, 2014