



Title: **Records Retention**

Code: 800

Book: Policy Manual

Section: 800 Operations

Purpose

This policy is adopted to establish a systematic records retention system for school district records. The Board recognizes that the orderly and managed retention and destruction of school district records promotes efficiency, conserves financial and physical resources, and promotes the orderly day-to-day execution of school district business.

Authority

The Board directs the Superintendent to develop procedures to implement this policy including creating a Records Retention Schedule for school district records. The Superintendent or the Superintendent Designee will serve as the central point of contact for the district to coordinate the retention and disposition of records. Although day-to-day supervision of records retention and disposition may be delegated to the Designee the Superintendent maintains the responsibility and authority to enforce this policy.

Guidelines

Records

Any form of data or information created, received, and/or maintained as evidence or information by the district, or a person acting on behalf of the district, in connection with the transaction of official school district business. **Records** include electronic data, but specifically exclude text messages, voice messages, transmittal data (such as fax cover sheets), drafts, and Post-It notes, which are temporary in nature and not managed by the district.

School district shall be retained in such a manner as to:

1. Meet legal standards for protection, storage and retrieval;
2. Protect privacy as required by law;
3. Optimize the use of storage space;
4. Minimize the cost of data retention; and
5. Destroy records when no longer needed in an appropriate manner.

Records Procedures Must Be Followed

All school district employees must follow this policy, Policy 216 Student Records, and any administrative procedures developed to implement those policies. Failure to adhere to this policy or the administrative procedures developed to implement this policy may be cause for disciplinary action, up to and including dismissal. Copies of this policy and Policy 216 Student Records shall be available on the district's website. [1]

Exceptions

Requests for exceptions to this policy or its administrative procedures must be submitted in writing to the Superintendent or the Superintendent's Designee. Upon review of the request, the Superintendent or the Superintendent's Designee may grant an exception so long as the exception does not substantially impede the overall purpose of this policy or its administrative procedures.

Training

All employees shall be provided with a copy of this policy, Policy 216 Student Records, and any administrative procedures developed to implement those policies. Copies of this policy and Policy 216 Student Records shall also be made available on this district's website. Periodic training shall be provided to employees to implement these policies and procedures.

Interpretation

The Superintendent or Superintendent's Designee shall be responsible for interpreting any portions of this policy or any administrative procedures developed to implement this policy.

Litigation Hold

No employee shall destroy any record if the school district has been made aware that the record may be needed for pending or anticipated litigation.

Any district administrator, upon being notified of pending or anticipated litigation and the need to preserve certain records, shall immediately notify the

Superintendent or the Designee in writing to ensure the preservation of the proper records and suspension of any record disposal activities for the records in question. The Superintendent shall coordinate with the district solicitor or special counsel to ensure that all required records are preserved for the duration of any litigation. Records retained pursuant to a litigation hold shall be retained until the final disposition of all litigation proceedings and until the written instruction by the attorney for the district that the records may be destroyed.

Disaster Preparation/Documents of Exceptional Value

The Superintendent or Designee is directed to identify and to take special precautions to preserve records critical to the operations of the school district and records with significant historical value. Those records include:

1. Legal, financial, and tax records;
2. Records regarding school district obligations to employees, contractors, and vendors;
3. Records documenting ownership of property and other assets;
4. Intellectual property;
5. Documents and plans regarding critical infrastructure; and
6. Archival records of historical value including School Board minutes, audit reports, trademarks, copyrights, deeds, financial records, photographs, and school district publications.

Legal

1. Pol. 216

24.P.S. 433

24 P.S. 518

20 U.S.C. 1232g

65 P.S. 67.101 et seq

Federal Rules of Civil Procedure

Pol. 004

Pol. 006

Pol. 105.2

Pol. 114

Pol. 138

Pol. 203

Pol. 203.1

Pol. 209

Pol. 212

Pol. 216.1

Pol. 233

Pol. 314

Pol. 324

Pol. 326

Pol. 334

Pol. 601

Pol. 609

Pol. 610

Pol. 618

Pol. 619

Pol. 702

Pol. 706

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