

SECTION: OPERATIONS
 TITLE: RECORDS
 MANAGEMENT
 ADOPTED: May 19, 2008
 REVISED:

CALIFORNIA AREA SCHOOL DISTRICT

800. RECORDS MANAGEMENT	
1. Purpose	The Board recognizes the importance of establishing and maintaining a Records Management Plan that defines district staff responsibilities and complies with federal and state laws and regulations.
2. Authority SC 518	<p>The Board shall retain, as a permanent record of the district, Board minutes, annual auditor’s reports and annual financial reports. All other financial records, including financial account books, orders, bills, contracts, invoices, receipts and purchase orders, shall be retained by the district for a period of not less than six (6) years.</p> <p>All other district records shall be retained in accordance with state and federal law and regulations and the district Records Management Plan approved by the Board.</p> <p>The district shall make a good faith effort to comply with all proper requests for record production.</p>
3. Definition	<p>Electronic Mail (E-mail) System – a system that enables users to compose, transmit, receive and manage text and/or graphic electronic messages and images across local area networks and through gateways connecting other networks. This information consists primarily of messages but many include attachments such as calendars, directories, distribution lists, word processing documents, spreadsheets, and other electronic documents.</p> <p>Litigation Hold – a communication ordering that all records and data relating to the subject of a dispute being addressed by current or impending litigation be preserved for possible production in the litigation.</p>

<p>5. Guidelines</p>	<ol style="list-style-type: none"> 2. Review the Records Management Plan periodically to ensure that record descriptions and retention periods are updated as necessary. 3. Identify, when the retention period expires, the specific records to be disposed of annually. <p><u>Records Management Plan</u></p> <p>The district's Records Management Plan shall be the principal means for the retention, retrieval, and disposition of manual and electronic records, including emails. The Plan shall not rely primarily on backup systems to manage the retention and disposition of records.</p> <p>The Records Management Plan shall include:</p> <ol style="list-style-type: none"> 1. Comprehensive listing of records and data of the district. 2. Criteria to distinguish school district records from employee's records. 3. System(s) of records storage and retrieval to be used, including in what form the records will be stored, maintained, reproduced and disposed. 4. Preservation measures to protect the integrity of records and data. 5. Data map or flow chart detailing the sources, routes, and destinations of electronic records. 6. Procedures and employee designated for determining whether an item is a record. 7. Procedures for adding, revising or deleting records and data, and any other details necessary to implement the Records Management Plan. 8. Records retention schedule. 9. Provisions for the storage and retrieval of records in the event of an emergency or a disaster. 10. Positions authorized to access district records 11. Procedures to be implements in the event of a litigation hold that immediately suspends disposition of all records relevant to the current or potential claim.
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Such procedures shall specify:

- Who can initiate a litigation hold
- How and to whom a litigation hold is communicated
- Who will determine which records are subject to the litigation hold
- Who will be responsible for collecting such records
- In what format the records will be collected

E-mail Records

E-mail messages, in and of themselves, do not constitute records. Retention and disposition of e-mail messages depends on the function and content of the individual message.

Records on an e-mail system, including messages and attachments, shall be retained and disposed of in accordance with the district's Records Management Plan. E-mail messages and attachments that do not meet the definition of records shall be deleted every week.

E-mail records may be maintained as an electronic record or be printed and maintained as a manual record.

For each e-mail considered to be a record, the following information shall be retained:

1. Message content
2. Name of sender
3. Name of recipient
4. Date and time of transmission and/or receipt.

Contractors

Records created or maintained by contractors employed by the board shall be retained and disposed of in accordance with the Records Management Plan.

References:

School Code – 24 P.S. Sec 433, 518

Family Educational Rights and Privacy Act – 20 U.S.C. Sec. 1232g

Federal Rules of Civil Procedure – 16, 26, 34, 37, 45

Board Policy, 004, 006, 105.2, 114, 138, 203, 203.1, 209, 212, 216, 216.1, 233, 314, 324, 326, 334, 414, 424, 426, 434, 514, 524, 526, 534, 601, 609, 610, 618, 619, 702, 706, 716, 810, 810.1, 830, 912

Administrative Regulations – 800-AR, 800-AR-1