

RECORDS MANAGEMENT**I. PURPOSE**

This policy establishes a program for the systematic organization, identification, maintenance, retention and disposal of records created by the Cobleskill-Richmondville Central School District. The policy ensures that the District's documentation is complete for legal, fiscal, administrative and historical purposes.

II. COVERAGE

All personnel.

III. REFERENCE

PART 185, 8 NYCRR, REGULATIONS OF THE COMMISSIONER OF EDUCATION

IV. RESPONSIBILITY

1. The Records Management Officer is responsible for:
 - a. Formulating, planning and implementing the Districts Records Management Program.
 - b. Recommending and guiding the development and application of records management practices for district personnel.
 - c. Coordinating the continuous disposition of obsolete records in accordance with legal requirements through the use of Records Retention Schedule ED-1.
 - d. Recommending to the Commissioner of Education suitable retention periods for any records not covered by Records Retention Schedule ED-1.
 - e. Coordinating the storage and management of inactive records, those no longer for the conduct of the day to day business of the School District.
 - f. Reviewing and making recommendations on requests for record storage equipment.
 - g. Coordinating the School District's micrographics program.
2. District personnel are responsible for following the Records Management Program.

V. DEFINITIONS

1. Record – any paper, book, photo, microfilm, map, drawing, chart, card, magnetic tape or printout that has been generated or received by the district and is used as evidence of activity.
2. Record Copy – an original document or unaltered duplicate designated as an original; the official copy to be retained
3. Historical Records – records of enduring value.
4. Active Files – are defined as those containing records that are referred to frequently in the performance of current administrative work.
5. Inactive Files – a series of records with a reference rate of less than one search per file drawer per month.

VI. POLICY

1. District records will be indexed, stored, made accessible as needed and ultimately (except for permanently retained records) destroyed in a manner designed to facilitate operations and staff work in the most effective manner at a reasonable cost.

2. All records are district property. Upon termination of employment, and employee should not remove records from the premises. These records should be retained by the employee's department until a determination can be made of their value.
3. In the interest of cost efficiency, records will be stored in the least expensive form that can be made accessible readily on request. This will be accomplished through inactive storage and conversion of records to microfilm or magnetic tape/disk as appropriate.
4. Records will be destroyed when the retention period has expired as identified by the Records Management Officer or when they are no longer useful for normal operations of the district, whichever is later.
5. The established Records Management Retention Schedule will be derived from ED-1.
6. The Records Management Program is committed to the following:
 - a. Vital and historical document preservation and security.
 - b. Reduction in the storage requirements for paper documents.
 - c. Maximum controlled use of microfilm production and duplication.
 - d. Microfilm standards and procedures adequate to meet related legal obligations.
 - e. File integrity through the use of standardized file practices and system control.

VII. OTHER CONSIDERATIONS

Ineffective storage of records in paper form can be wasteful of space and staff time as well as being expensive. Only working files and official file copies should normally be maintained in department offices. After which time records fulfilled their administrative usefulness to the department, they should be transferred to inactive storage. An index to all records will be maintained and made available upon request from the Records Management Officer.

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