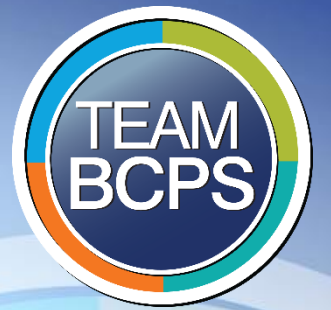


Records Retention Program Training

Managing Records in Schools



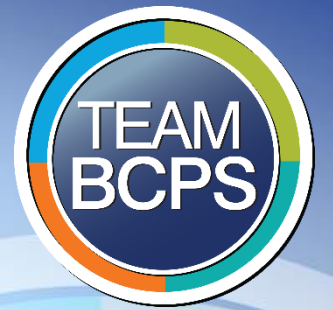


The Records Liaison

What does that mean?

- The guardian of...your school's records
- Rule 2380
- The RL knows what records are kept in your school
- The RL is the expert!





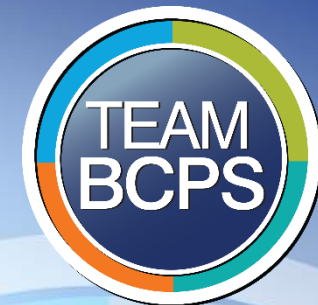
What is a “Record”?

- Rule 2380 defines a “record”.

Written materials
E-mail (some)
Books
Photographs
Publications
Forms
Maps
Drawings
Contracts
Disciplinary action
Student files
....and many more!

- Did you create it?
- Are you keeping it for reference or some other important reason?
- Does it document a transaction, decision or activity of BCPS?

Then it is a RECORD!

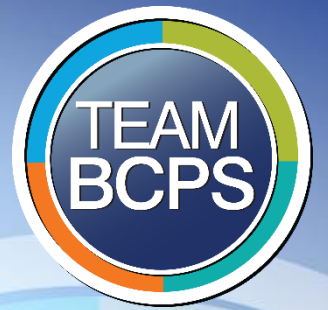


What Isn't a "Record"?

Do I really have to keep
EVERYTHING?

"Non records" are not subject to a retention schedule to do not have to be kept. Some examples are: extra copies, identical copies, some notes and drafts.

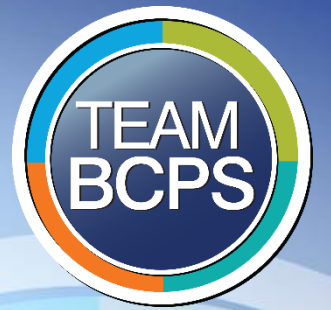
However, you must still fill out the CORD form to destroy non-records.



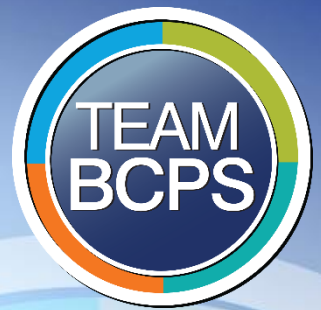
RECORDS ARE INFORMATION, NOT
FORMAT



Records Management Program



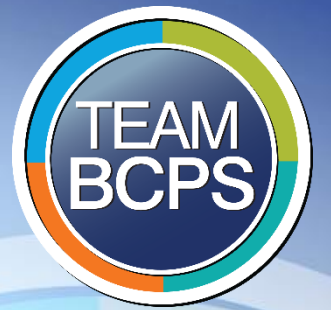
- Let's walk through the intranet website and look at some key features
- <https://intranet.bcps.org/default.aspx>
- https://intranet.bcps.org/records_retention_program/ ← direct link!
 1. Records Liaisons
 2. General Records/All Offices (Series A)
 3. Records Retention Schedules
 4. Student Records
 5. Forms



Division/Department: All Divisions and Departments

Office Name: All Offices and Schools

Series No.	Description	Retention
A.01	<p><u>Transitory Correspondence and Memoranda</u> Incoming and outgoing correspondence and memoranda related to matters of short-term interest. Transmittal correspondence and memoranda between individuals, departments or external parties containing no final contractual, financial or policy information. This correspondence and memoranda does not impact agency functions. When resolved, there is no further use or purpose.</p>	<p>Retain until administrative need ends and then destroy.</p>
A.02	<p><u>Administrative Correspondence and Memoranda</u> Incoming and outgoing business-related correspondence and memorandum created in the course of administering school system functions and programs. Administrative correspondence and memorandum documents work assigned, work accomplished, transactions made, or actions taken. This correspondence and memorandum documents the implementation of school system functions rather than the creation of functions or policies. Business-related correspondence and memorandum that is essential to a core function of another series should follow the retention period for that series.</p>	<p>Retain for 3 years and then destroy.</p>
A.03	<p><u>Executive Correspondence and Memoranda</u> Incoming and outgoing non-transitory, business-related correspondence and memoranda of the superintendent and the superintendent's cabinet members. These records document executive decisions made regarding agency interests and provide unique information relating to the functions, policies, procedures, or programs of an agency.</p>	<p>Permanent. Retain for 5 years and then transfer to Maryland State Archives.</p>

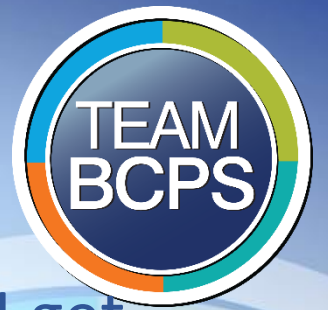


Records Disposition

- Disposition of records refers to either
 1. Destruction of records
 2. Transfer of records (offices only)
- Retention schedules do NOT authorize disposition of records
- ONLY the Records Officer may authorize disposition of records in writing.



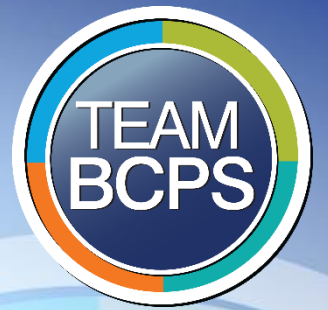
So How Do I Destroy Records?



- Now that the retention period of my record has passed, how can I get rid of it?
- Fill out Certificate of Records Destruction for both records AND non-records
- Sign and send it to the Records Officer recordsretention@bcps.org
- Wait
- If approved, the Records Officer will sign and send it back to you and copy Logistics
- Contact Logistics and follow their SOP and attach a copy of the CORD form and T-req
- ONLY Logistics is authorized to destroy physical records. Electronic media may be deleted after authorization is received.



CORD Form Sample

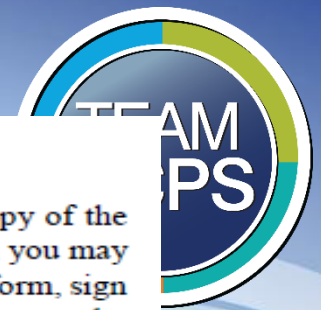


- How do I get rid of:
 1. Copies and duplicate copies of assignments, notes, schedules?
 2. Correspondence and memoranda I wrote for a short-term purpose?
 3. P-card records?
 4. SAF records?
 5. Absence cards, permission slips and sign in sheets?

We are
TEAM
BCPS



CORD Form Sample



CERTIFICATE OF RECORDS DESTRUCTION

Instructions: This form is to be used in conjunction with Rule 2380, *Records Retention*. List all records to be destroyed, sign, and send a copy of the completed CERTIFICATE to the Records Officer via email recordsretention@bcps.org. Upon receipt of the signed form from the Records Officer, you may destroy the records or request transfer of the records to Logistics for immediate destruction. Once destroyed, complete the last two columns of the form, sign where indicated, and return the signed form to the Records Officer via email recordsretention@bcps.org. Retain a copy of the approved form permanently.

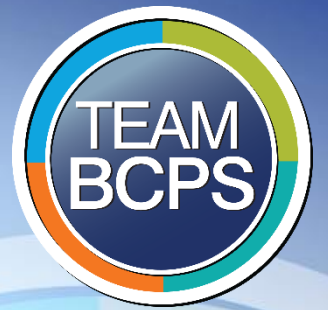
Division/Department or School Name:	The Best School Elementary
Office Name:	n/a

Box No.	Record Series Title	Schedule No.	Series No.	Inclusive Dates	Quantity of Material	<i>(Complete After Approval to Destroy is Received from Records Officer)</i>	
						Date of Destruction	Method of Destruction
1-3	Non-records: copies of schedules, class lists bus schedules, duplicate paperwork copies	N/A	N/A	01/2019-10/2019	3 boxes		
4	Transitory Correspondence and Memoranda	C1446	A.01	12/2018-06/2019	1 box		
5-6	Procurement Card Records	C1446	A.06	01/2015-10/2019	2 boxes		
7	General School Accounting Records: SAF receipts, worksheet	School-Elem.	N/A	01/2012-09/2014	1 box		
8	School Administrative Records: parent permission slips absence cards, sign in sheets	School-Elem.	N/A	2011-2014	1 box		

Will NOT be approved!

AUTHORIZATION TO DESTROY:			
TITLE	PRINT NAME	SIGNATURE	DATE
RECORDS LIAISON	Rachel Records Liaison	signature	10/24/19
OFFICE HEAD/PRINCIPAL	Patty Principal	signature	10/24/19
RECORDS OFFICER			
DESTROYED BY			

Managing Electronic Records

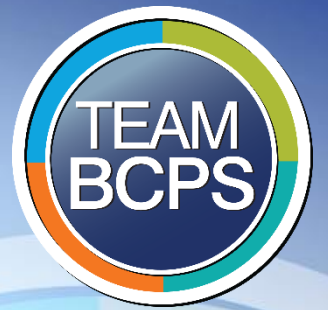


- Electronic records should be treated the same way paper records are.
- It is about the **content** NOT the medium.
- Keep the **content** together.





Questions?



- Contact the Records Officer
 - recordsretention@bcps.org
 - 443-809-4060

