

Colorado Springs School District 11
Records Retention Schedule

**SCHEDULE II
GENERAL ADMINISTRATIVE RECORDS**

General Description: Records generally relating to the administration and direction of the school district's various programs. *The specified retention period applies to the information contained within the record, regardless of the physical format of the record (paper, microfilm, computer disk or tape, optical disk, etc.).*

1. **Accreditation Contract** – A formal contract with the Colorado Department of Education for accrediting the District's schools.

Retention: Permanent
Format: Paper or electronic
Location: Office of the Superintendent (Office of Record)

2. **Accreditation Annual Report** – This report is created by the District's Accountability Advisory Committee to inform the Board of Education as to the accreditation status of each school not to be confused with the Annual Report to the Public.

Retention: Current year plus 10
Format: Paper or electronic
Location: Office of Assessment and Research (Office of Record)

3. **Accreditation Accountability Report to the Public**

Retention: Current year plus 10
Format: Paper or electronic
Location: Office of Assessment and Research (Office of Record)

4. **Affidavits of Publication** – proof of publication provided by newspapers that are required of the school district such as budget, board meetings and other special notices

Retention: 6 years
Format: Paper or electronic
Location: Office of Communications and Community Relations (Office of Record)

5. **Agreements and Contracts** of various kinds that document some form of agreement or contract that is enforceable by law between the school district and other parties regarding leases, franchises, professional services and other ones that the school district should enter into.

Retention: Duration of the agreement or contract plus 6 years, to include any terms limiting action there under
Format: Paper including original signatures
Location: Office of Communications and Community Relations (Office of Record) for the duration of the agreement and then transferred to the Records Management Center

6. **Annual Report** of the District to the Board of Education and/or citizens of the District used as a public relations publication and not to be confused with the Accreditation Accountability Report to the Public.

Retention: Permanent
Format: Current year may be posted on the District's web site with a paper or electronic copy created as the record
Location: Office of Communications and Community Relations (Office of Record) for the current school year and then transferred to the Records Management Center

Duplicate Copies: retain those that are created for **administrative purposes** for 1 year, and retain those created for **convenience or reference purposes** until no longer needed or for 1 year, whichever is first. Duplicate copies should not be retained longer than the record copy.

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7. **Awards and Honors** that the District has received from various public or private sources.

Retention: Permanent
Format: Form of what was received
Location: Office of Record, Records Management Center or where the Superintendent or designee determines to be the best location for retention.

8. **Colorado Open Records Act Request Logs** as required by statute.

Retention: Current school year plus 5
Format: Paper or electronic
Location: Records Management Center (Office of Record)

9. **Committee Records – Internal** – records that document the actions and decisions of various committees, task forces or other special district sanctioned groups that meet on an ongoing basis or are established for a specific purpose. Some examples of these would be textbook review, school lunch program and the parent – school resource groups.

a. Ongoing Committees

Retention: 2 years, provided records have no long-term value
Format: Paper or electronic
Location: Office of the committee chair (Office of Record)

b. Specific Purpose Committees

Retention: Until work of the committee ends and there is no long-term value.
Format: Paper or electronic
Location: Office of the committee chair (Office of Record)

10. **Complaints** - communications that are received from parents and/or other persons regarding objections, dissatisfactions or disagreement with school district policies or actions. (Excludes employee, student or other individual complaints covered under other retention schedules.)

Retention: 2 years after response or action by the school district, and all rights of appeal have been exhausted. The response is to be kept with the complaint.
Format: Paper or electronic
Location: Office of Record

11. **Correspondence – Routine** is written communication that is sent or received by one or more individuals via the US mail, private courier, facsimile transmission or electronic mail. The information contained in this type of correspondence is general in nature and does not convey district policy or legal/fiscal positions.

Retention: Until no longer needed
Format: How received
Location: Office of Recipient (Office of Record)

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12. **Correspondence – Legal, Fiscal, Policy** – this written communication is sent in the same manner as the routine correspondence, but its' value is important to the school district by the very nature of its subject matter. Examples of this type of correspondence are communications dealing with district fiscal policy, legal issues, property records, court filings and other topics that may be needed for future use.

Retention: Permanent
Format: Paper or electronic
Location: Office of Recipient (Office of Record). When no longer needed, transfer to the Records Management Center

13. **Forms – Blank** that are not considered to be records and should be separated from the school district's records. However, a master forms file may be maintained to track the evolution of the form and instructions regarding use of the form.

Retention: Until superseded, except retain one copy permanently if a master forms file is maintained
Format: Original of creation or electronic
Location: Office of creation (Office of Record)

14. **General Administrative Records** that are created or received in the course of administering programs, including daily, weekly or monthly activity reports which are summarized in the District's annual report

Retention: 2 years or until no longer needed for reference
Format: Original of creation or electronic
Location: Office of creation (Office of Record)

15. **Housekeeping Files** that are maintained by an office. Includes such records as charity fund drives, office parties, custodial service requests, parking space assignments, telephone and fax logs and distribution of keys.

Retention: Until no longer needed for reference
Format: Original of creation or electronic
Location: Office of creation (Office of Record)

16. **Mail & Postage Records** that record the amounts of mail dispatched, the cost center to be charged, and the total amounts of postage charged.

Retention: 2 years
Format: Original of creation or electronic
Location: Office of creation (Office of Record)

17. **News Releases** that are prepared statements or announcements issued to the news media regarding school board decisions, changes in senior administrative personnel, and or program changes or termination of specific school or district programs. All others prepared for the purpose of Public Relations or Marketing for the district or school are to be kept as long as there is a value to do so.

Retention: 4 years/permanently if the release involves major policy or historical news.
Format: Paper or electronic
Location: Office of Communications and Community Relations (Office of Record)

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18. **Policy and Program Development Records** that document the formulation and adoption of policies, procedures and functions of the school district. Includes narrative and/or statistical reports, related correspondence on program activities, organizational charts and records related to significant events in which the school district participated.

Retention: Permanent
Format: Original of Creation or electronic
Location: Office of Record

19. **Publications** that are produced for wide internal or external distribution, including district brochures, pamphlets, newsletters, studies, proposals, proposed instructional materials, and similar materials produced and made available to the public. One copy should be retained permanently.

Retention: Permanent
Format: Original of Creation or electronic
Location: Office of Creation (Office of Record)

20. **Reports (Daily, Monthly, Quarterly)** that are prepared by various school district departments regarding the educational operation and/or activities, and are for use in compiling other reports, planning and budgeting, monitoring academic achievement and progress, etc....

Retention: 3 years
Format: Paper or electronic
Location: Office of Creation (Office of Record)

21. **School Report Cards** issued by the Colorado Department of Education

Retention: Permanent
Format: Original of creation or electronic
Location: Current school year in the Superintendent's Office and then transferred to the Records Management Center

22. **Studies & Plans** prepared by the school district or contractors for the District. Examples include feasibility studies, planning and land use, population estimates, educational achievement, capital projects, transportation projections and other documents that have long-term reference or historical value to the school district.

Retention: Permanent
Format: Original of creation or electronic
Location: Office of creation until of no further use and then transferred to the Records Management Center

23. **Surveys & Questionnaires** or other similar documents used by the district to evaluate or gain feedback from students and citizens.

Retention: Until no longer needed for administrative or educational purposes
Format: Original of creation or electronic
Location: Office of creation (Office of Record)

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24. **Worksheets & Drafts** such as rough notes, calculations or drafts assembled or created and used to prepare or analyze other documents; records of preliminary or working stage which are used in preparation of the final version or a document or report.

Retention: Until no longer needed
Format: Original of creation
Location: Office of creation (Office of Record)

25. **Appointment Books, Calendars, Planners** created by individuals, departments, divisions, or the District used for District business. This includes records created on electronic devices such as *Palm Pilots* or similar devices.

Retention: Until no longer needed
Format: Original of creation
Location: Office of creation (Office of Record)

26. **Budget Working Copies or Preparation Documentation** created by departments or divisions other than the official budget documents created by the Budget Office for Board approval.

Retention: Until no longer needed
Format: Original of creation
Location: Office of creation (Office of Record)

27. **Consultant Reports** provided to departments, divisions, the District or the Board of Education.

Retention: CY + 5 years
Format: Paper or electronic
Location: Office of creation (Office of Record)

28. **Electronic Records** used solely to create a hard copy (paper) record or report. This may include records and drafts created in variety of software such as e-mail, Word, Excel, Access, Adobe, Power Point, and Publisher.

Retention: Until no longer needed
Format: Original of creation
Location: Office of creation (Office of Record)

29. **Staff Directories, Rosters, or Listings**

Retention: Until no longer needed
Format: Original of creation
Location: Office of creation (Office of Record)

30. **Input/Source Records** created solely to input data extracted from other records.

Retention: Until data has been verified and record is no longer needed
Format: Original of creation
Location: Office of creation (Office of Record)

31. **Training and Presentation Material Records**

Retention: Until no longer needed
Format: Original of creation
Location: Office of creation (Office of Record)

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32. **Project Management Files** including records created to design, develop, control, or monitor a specific project or group of projects. (Does not include construction project records and other project records covered by other schedules)

Retention: Until no longer needed if they are of no historical value for future reference
Format: Original of creation
Location: Office of creation (Office of Record)

33. **Registration Materials for Training Classes and/or Conferences**

Retention: Until no longer needed
Format: Original of creation
Location: Office of creation (Office of Record)

34. **Training & Conference Materials** that document school employees at seminars, conferences or other training events not sponsored by the school district, including instructional materials obtained at these meetings or training sessions.

Retention: 2 years
Format: Original of creation
Location: Office of creation (Office of Record)

35. **Procedures and Operating Manuals for internal use**

Retention: 1 year after no longer in use
Format: Original of creation
Location: Office of creation (Office of Record)

36. **Staff Meeting Files**

Retention: Current year plus 1
Format: Original of creation
Location: Office of creation (Office of Record)

37. **Telephone Message Records or Logs**

Retention: Until no longer needed
Format: Original of creation
Location: Office of creation (Office of Record)

38. **Voice Mail Records**

Retention: Until no longer needed
Format: Original of creation
Location: Office of creation (Office of Record)

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