

SCHOOL BOARD POLICY
School District of Holmen
Holmen, WI 54636

FILE: 824
SCHOOL COMMUNITY RELATIONS

RECORDS RETENTION

Philosophical Foundation:

The School District of Holmen, like all districts, collects thousands of pages of records on an annual basis. In order to address questions regarding records retention, destruction and transfer of records, the School Boards adopts the Wisconsin School District Records Retention Schedule. This schedule provides recommended retention periods for records common to all school districts, denotes records of historical significance, and outlines a process for the orderly transfer of records to the State Historical Society.

Definitions:

- “Record” – Any material on which written, drawn, printed, spoken, visual, or electromagnetic information is recorded or preserved, regardless of physical form or characteristic, which has been created or is being kept by an authority. “Record” includes, but is not limited, handwritten, typed, or printed pages, maps, charts, photographs, films, recordings, tapes (including computer tapes), computer printouts and optical disks. A “record” does not include drafts, notes, preliminary computations and like materials prepared for the originator’s personal use or prepared by the originator in the name of a person for whom the originator is working. (Wis. Statute 19.32(2)).
- “Public Record” – All books, papers, maps, photographs, films, recordings, or any other documentary materials or working copies, regardless of physical form or characteristics, made or received by any agency of the state or its officers or employees in connection with the transaction of public business, except the records and correspondence of any member of the state legislature, as defined in s.16.61(2)(b), Wis. Statutes.
- “Confidential Record” – Student records/data and some personnel information is confidential and therefore, exempt from public inspection.
 Maintenance Procedures for e-mail management: E-mail messages that are considered a record must be maintained. District employees should make a printed copy or should transfer the message to another location, i.e., folders or disk. Any exceptions would need to be approved by the legal custodian of records (district administrator).

Adoption of the School District Records Retention Schedule will:

- Enable the District to dispose of some records in less time than seven years, the generally accepted time frame.
- Determine the minimum amount of time that the District must maintain a record.
- Provide guidance regarding district records that should be preserved locally and may be of interest to the State Historical Society.
- Eliminate paperwork for both the District and State Historical Society.

Records determined to be of permanent historical importance are noted on the Records Retentions Schedule. If the Historical Value column is checked on the schedule, the record should be transferred to the Historical Society only if the District does not wish to physically retain the records permanently.

The School District of Holmen follows the Wisconsin Records Retention Schedule for School Districts.

Legal References:

Wisconsin Statutes:

- Section 16.61(2)(b) Records of state offices and other public records
- Section 19.21 (6) Custody and delivery of official property and records
- Section 19.23 Transfer of records or materials to historical society
- Section 19.35 (5) Record Destruction
- Section 19.36(4) Computer Programs and Data

Cross References: Section 118.125 Pupil Records
Section 120.13(12) Historical Records
2003 Wisconsin Act 47
Acceptable Use of Technology, 363
Access to Public Records, 823
Student Records, 347
Data Records Retention, 825

Approved: May 23, 2005
Revised: March 18, 2008
Approved: May 27, 2008
Revised: December 11, 2013
Approved: January 27, 2014

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**NOTIFICATION OF ADOPTION
OF
SCHOOL DISTRICT RECORDS RETENTION SCHEDULE**

- 1) Complete and send the original and 2 copies to: State Archivist, State Historical Society Wisconsin, 816 State St., Madison, WI 53706
- 2) Destruction of records according to the general schedule is NOT permitted until this form is signed by the State Historical Society of Wisconsin and, for records less than 7 years old, the Wisconsin Public Records and Forms Board.

School District: Telephone:
 SCHOOL DISTRICT OF HOLMEN (608) 526-6610

Address (Street, City, Zip):
 1019 Mc Hugh Road, Holmen, WI 54636-0580

This is to notify the State Historical Society and the Wisconsin Public Records and Forms Board that the school district named above has officially adopted the School District Records Retention Schedule. School Districts are advised to adopt the entire schedule. If this is not possible, individual sections may be adopted. Check appropriate box(es).

The School District adopts the entire schedule.

The School District adopts ONLY the following sections:

- | | |
|---|--|
| <input type="checkbox"/> Administration Records | <input type="checkbox"/> Personnel Records |
| <input type="checkbox"/> School Board Records | <input type="checkbox"/> Employee Records |
| <input type="checkbox"/> Building and Grounds Records | |
| <input type="checkbox"/> Transportation Records | <input type="checkbox"/> Pupil Records |
| <input type="checkbox"/> Statistical Records | <input type="checkbox"/> Information Records |
| <input type="checkbox"/> Program Applications/Evaluations | <input type="checkbox"/> Progress Records |
| <input type="checkbox"/> Behavioral Records | |
| <input type="checkbox"/> Finance Records | <input type="checkbox"/> Special Ed Individual Student Records |
| <input type="checkbox"/> Purchasing/Payroll Records | |
| <input type="checkbox"/> Accounting/Budget Records | <input type="checkbox"/> Special Education Records |
| <input type="checkbox"/> Miscellaneous Records | |

The School District has developed its own schedule (attached)

The School District has modified the schedule (modifications attached).

Name of School District Official: Dr. Dale N. Carlson

Title: District Administrator

 Signature of School District Official

 Date Signed: *mo/day/yr*

The Wisconsin Public Records and Forms Board and the State Historical Society of Wisconsin acknowledge your notification of Adoption of the School District Records Retention Schedule. You are hereby authorized to retain, transfer, and dispose of records as indicated on the schedule.