



Arizona State Library, Archives and Public Records

General Records Retention Schedule for School Districts and Charter Schools Management Records

Schedule Number:

000-10-77

Authorization and Approval

Pursuant to ARS §41-1351, the retention periods listed herein are both the minimum and maximum time records may be kept. Keeping records for a time period other than their approved retention period is illegal. However, records required for ongoing or foreseeable official proceedings such as audits, lawsuits or investigations, must be retained until released from such official proceedings, notwithstanding the instructions of this schedule. If it is believed that special circumstances warrant that records should be kept longer or shorter times than the time period listed in this schedule or that any of these records may be appropriate for transfer to the State Archives, please contact the Records Management Division to inquire about a change to the retention period. Only the Arizona State Library, Archives and Public Records has the authority to extend records retention periods. **Public records, including electronic records, not listed in this schedule are not authorized to be destroyed.**



Gladys Ann Wells, Director
Arizona State Library, Archives and Public Records

Date Approved:

22 June 2010

**General Retention Schedule for
School Districts and Charter Schools
Management Records**

<u>Item #</u>	<u>Records Series</u>	<u>Retention (Yrs.)</u>	<u>Remarks</u>
1.	Minutes (including agendas (if agenda or index is not part of the minutes) and supporting documentation referenced in minutes and needed to clarify the minutes) a. Governing Boards, Commissions and Councils b. Other Decision-making Committees, Boards or Commissions c. Advisory Committees, Boards, Commissions, Task Forces, Ad Hoc Committees, etc. d. Executive Session and Work Study Records e. Audio or Video Recordings of Meetings	Permanent Permanent Permanent 10 3 months	Preserve pursuant to ARS §39-101 Preserve pursuant to ARS §39-101 Preserve pursuant to ARS §39-101 After fiscal year created After date of meeting and after minutes transcribed or summarized and approved but no more than 5 years after fiscal year of meeting After administrative or reference value has been served
	f. Staff meetings (routine staff meetings where policy is not set)	-	After administrative or reference value has been served
2.	Request to Speak Cards	-	After administrative value has been served and minutes transcribed or summarized and approved.
3.	Committee, Board, Commission, Council, Consultant or Task Force Reports/Studies a. Reports resulting in no action b. Reports/Studies resulting in project	5 -	After fiscal year submitted File with Project Records (Item #6)
4.	Executive Correspondence (correspondence of Board, Commission, Council or Agency Director that sets or discusses policies)	Permanent	Preserve pursuant to ARS §39-101

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5.	Committee, Board, Commission, Council or Task Force Records (including meeting notices, agendas, board packets, notes and other related records not retained with minutes)	3	After fiscal year created or received
6.	Project Records a. Historically Significant Projects b. All Other Records	Permanent 3	Preserve pursuant to ARS §39-101 After fiscal year completed or abandoned or after reference value has been served, whichever is later
7.	Agency Policies, Directives, General Orders, Mission Statements and Administrative Orders (does not include office internal administrative procedure records)	Permanent	Preserve pursuant to ARS §39-101
8.	Agency Annual Reports (agency copy)	10	After year reported or after reference value has been served, whichever is later. Send 2 copies to ASLAPR, Law and Research Library, State Documents. If electronic, send electronic copy to reports@lib.az.us and paper copy to ASLAPR, Law and Research Library, State Documents.
9.	Legislation Records a. Case files for legislation proposed by agency b. Legislation tracking records	Permanent 1	Preserve pursuant to ARS §39-101 After calendar year passed into law or defeated

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10.	Contracts, Agreements and Leases and related records (including Intergovernmental Agreements (IGA), mutual/automatic aid agreements, cooperative agreements and Memorandums of Understanding (MOU))	6	After fiscal year fulfilled, cancelled or revoked
11.	Performance Audit Reports (agency copy including Sunset Review records)	10	After audit completed or after reference value has been served, whichever is later.
12.	Publications Produced by Agency (including brochures, pamphlets, newsletters and other published reports)		
	a. Paper	1	After superseded or obsolete, unless otherwise specified in this retention schedule. Send 2 copies to ASLAPR, Law and Research Library, State Documents
	b. Electronic	1	After superseded or obsolete, unless otherwise specified in this retention schedule. Send electronic copy to reports@lib.az.us and paper copy to ASLAPR, Law and Research Library, State Documents
13.	Public Information Records (including press releases, photographs, scrap books, public service announcements and other related records)		
	a. Historical	Permanent	Preserve pursuant to ARS §39-101
	b. All other records	-	After administrative value has been served

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14.	Organizational Reporting Records (records of major changes to department or division organizational structure and its relationship to other offices and departments, including reporting structure and other functional relationships. Does not include information on individual employees.)	Permanent	Preserve pursuant to ARS §39-101
15.	Information Security and Privacy incident Records (incidents involving either paper or electronic records and including incidents related to those records) a. Health Insurance Portability and Accountability Act (HIPAA) Records (including HIPAA information security, privacy or other Administrative Simplification incidents or complaints) b. All other non-HIPAA Records (including information security and privacy incidents or complaints)	6 3	After incident closed and when no further activity is anticipated, whichever is later After incident closed and when no further activity is anticipated, whichever is later
16.	Subpoenas	1	After fulfilled or quashed
17.	Legal Records a. Attorney General records (including agency copy of opinions, memos, reports, or records of assistance) b. Case records (including records for suits filed by or against agency) i. Historic cases ii. All other cases	10 Permanent 10	After created or received or after administrative or reference value has been served, whichever is later Preserve pursuant to ARS §39-101 After case closed or after administrative or reference value has been served, whichever is later

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18.	School Facilities Board (SFB) Records (including reports and surveys sent to SFB)	5	After created or received or after administrative value has been served, whichever is later
19.	Grant Records	3	After fiscal year quarterly, annual or final expenditure report submitted and approved or after funding agency requirements are met, whichever is longer
	a. Administration and Financial Records		
	b. Programmatic Records	Permanent	Preserve pursuant to ARS §39-101
	i. Historically Significant Program Records	3	After fiscal year quarterly, annual or final expenditure report submitted and approved or after funding agency requirements are met, whichever is longer
	ii. All Other Program Records		
	c. Unsuccessful Grant Application Records	1	After rejected or withdrawn
	d. Other copies	-	After administrative value has been served but do not keep longer than after funding agency requirements are met for record copies

Supersedes schedule dated November 6, 2009