



San Diego Unified School District

EUGENE BRUCKER EDUCATION CENTER
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OFFICE OF THE CHIEF ADMINISTRATIVE OFFICER
Peter Iverson
Interim Chief Administrative Officer

MEMORANDUM

TO: Distribution List

FROM: P. Iverson 

DATE: March 18, 2008

SUBJECT: RECORDS STORAGE AT ANNEX 1 & ANNEX 4

On January 22, 2008, the Board of Education approved a contract with Cor-O-Van Records Management Inc., to provide the District with off-site records management storage and service. The purpose of this contract is to assist the District by centralizing and managing documents in order to be compliant with the statutory and regulatory requirements of California Code of Regulations, Title 5, Section 430-438, 16020-16027, and California Education Code Section 49060, which state that each school district is required to maintain all designated permanent records in perpetuity. This contract also provides the District with a confidential and cost effective state-of-the-art facility to store permanent records.

This letter is to inform you that your department has been identified as using Annex 1 and/or Annex 4 of the Education Center to store records. These locations can no longer be used as a records storage facility. All permanent and temporary records will be required to be transferred to the Cor-O-Van facility for storage *by Friday, May 16, 2008.*

You are required to designate a "Records Custodian" and an "Account Manager" to attend a records retention training/presentation on March 24, 2008 at 9:00 am in the Ed Center auditorium as per Administrative Circular No 69 dated February 26, 2008 (attached). The office of General Counsel will provide detailed information regarding record retention and legal requirements related to District records. Cor-O-Van will conduct a presentation about their facility, services, as well as training that is available on a site-by-site basis.

In addition to attending the March 24th training session, and in order to complete the task of preparing your records for storage, the "Records Custodian" and/or "Account Manager" from your department must attend training on one of the below listed dates. Please contact Vira Villarreal via e-mail vvillarreal@sandi.net no later than *Friday, March, 24, 2008*, to register for a training session. Cor-O-Van will assist district staff by providing on-site training in the preparation of records for inventory and storage. All meetings will be held in one-hour increments in either Annex 1 or Annex 4:

April 8 & April 10: 8:00am, 9:00am, 10am, 11am, 1pm, 2:00pm and 3:00pm
April 15 & April 17: 8:00am, 9:00am, 10am, 11am, 1pm, 2:00pm and 3:00pm

Once the appointment is scheduled, it will be the responsibility of your department to classify records as either permanent or as disposal. Cor-O-Van staff will provide training throughout the one-hour appointment on the preparation of records for inventory. They will guide staff through the use of their bar coding system as well as in the use of their on-line system to enter the inventory. Staff will not be required to move or transport any of the records to or from the facility.

The following is a general summary and set of guidelines when determining the status of your records. Further information will be provided at the March 24th training presentation.

Permanent records are generally:

1. **Financial** – official budget, financial reports of all funds, audit of all funds, average daily attendance, other major financial reports;
2. **Board of Education** – minutes of meetings of the Board and of its Committees, board member election records;
3. **Personnel** – all detailed records relating to employment, assignment, dates of service, termination/dismissal, sick leave, rates of pay, salaries, deductions, withholdings;
4. **Pupil** – legal name, date of birth, method of verification of birthdates, sex of pupil, place of birth, name and address of pupil's parents, starting and ending date of attendance, subjects taken, grades, school credits, immunization records, date of graduation;
5. **Property** – all detailed records relating to land, buildings, equipment.

Temporary Records are generally: Records that are necessary or useful for pending District business or issues. There is no time limit on the retention period for these records. For example, a temporary pupil record may be necessary or useful for as long as the pupil attends District schools.

Disposable Records are generally: Temporary records that are no longer useful or necessary for pending District business or issues may be destroyed four years after they have been identified as records that may be destroyed. ("disposable records"). However, certain pupil records, such as discipline records, may be destroyed starting six months after the pupil completes, or withdraws from, the District educational program.

If you have any questions or comments, please contact Vira Villarreal, Operations Specialist, at (619) 725-7329 or vvillarreal@sandi.net, or Patrick Haggerty, Contract Specialist at (858) 522-5812 or phaggerty@sandi.net.

Thank you for your cooperation and assistance with this program.

PMI:vv

c: Distribution List

SAN DIEGO UNIFIED SCHOOL DISTRICT

Date: February 26, 2008

To: School Principals, Division and Department Heads, Child Development Center Administrators and Central Office Managers

Subject: COR-O-VAN OFF-SITE RECORDS MANAGEMENT

Department and/or Persons Concerned: All Staff

Reference: Administrative Policy 6520

Due Date: March 10, 2008

Action Required: Provide the Office of the General Counsel with the name of the site designated "Records Custodian".

Brief Explanation:

The district generates a tremendous volume of records each year, and over the years has accumulated and stored tons of documents throughout the district. Many of these documents do not need to be regularly accessed and can be archived in deep storage at a local non-district facility. On January 22, 2008, the Board of Education approved a contract with Cor-O-Van to provide off-site records management services. This contract will help the district manage documents in order to comply with the statutory and regulatory requirements of California Code of Regulations, Title 5, Sections 430-438, 16020-16027, and Education Code Section 49060, which state that each school district is required to maintain all designated permanent records in perpetuity.

The use of Cor-O-Van will enable departments and sites to store records off-site thereby freeing up valuable on-site space. Sites will be able to have total control over their own records by ordering services, checking the status of orders, checking inventory and balances, as well as updating information associated with stored items.

In order to achieve a smooth transition to a district-wide method of storing documents off-site, all sites will be required to follow the below process:

1. Each cost center or responsible department head to provide the Office of the General Counsel, in writing, by March 10, 2008, with the name of the designated "Records Custodian" who will be responsible within that cost center for annually reviewing and categorizing records. Multiple cost centers within a single department may have a single designated Records Custodian.

2. Once the Records Custodian has been identified, that individual and the Site Administrator, Principal (or designee), or Department Head will attend a presentation by Cor-O-Van on March 24, 2008, in order to acquire a User Name and to set-up an account. Presentation details will be mailed to all designated Record Custodians, Site Administrators, Principals and/or Managers.
3. After attending the presentation, the Records Custodian, Site Administrator, Principal and/or Manager will be assigned a User Name and an account.
4. Accounts will be assigned using individual Cost Centers as the identifier for the Cor-O-Van account and for billing purposes.
5. Accounts may receive different levels of security based on district requirements for user access and user roles. Security levels will be determined by the district during initial set up of users as part of account set up.
6. Once accounts are set up, payments can be made using a requisition/purchase order. Purchase orders can be generated automatically using established parameters in PeopleSoft.
7. The cost of the storage is reasonable and should not be a hardship for departments or sites. For example, the minimum District-wide monthly storage charge is \$40.00 and per retrieval charge is \$1.60.

If you have any questions or comments, please contact Vira Villarreal, operations specialist, at (619) 725-7329, or Patrick Haggarty, contract specialist, at (858) 522-5812.



Peter Iverson
Interim Chief Administrative Officer

PI:vv

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