

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

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