

THE SCHOOL DISTRICT OF PHILADELPHIA

No. 800

Section: 800 Operations

Title: Records
Management

Adopted: June 24, 2021

Revised: January 26, 2023

800 RECORDS MANAGEMENT

Purpose

The purpose of this Policy is to require the School District of Philadelphia (“District”) to establish and maintain a records management process that defines District staff responsibilities and complies with federal and state laws and regulations.

Authority

As required by the Pennsylvania Public School Code, the Board of Education (“Board”) shall retain, as a permanent record of the District, Board minutes, annual auditor's reports, and annual financial reports. All other financial records, including financial account books, orders, bills, contracts, invoices, receipts, and purchase orders, shall be retained by the District for a period of not less than six (6) years.[1]

All other District records shall be retained in accordance with state and federal law and regulations and the District records retention schedule(s).

Delegation of Responsibility

The Board directs the Superintendent or their designee, through the Records Management Office, to develop and maintain, in consultation with the Chief Information Officer and Office of General Counsel (OGC), a records management process for the District that complies with legal and regulatory requirements and this policy in consultation with program offices.

The Records Management Office shall be responsible for:

1. Ensuring that training is provided to appropriate District staff members.
2. Creating and maintaining Administrative Procedures, a Record Center User’s Guide (“User’s Guide”), and a Records Retention Schedule to provide guidance on which records must be maintained; how to effectively maintain, catalog, and dispose of records; and how to proceed in the event of a litigation hold.[2][3]

3. Reviewing all records retention schedule(s) as needed to ensure that record descriptions and retention periods are updated as necessary.
4. Annually notifying District schools and offices of their obligations under this Policy and the related documents and provide guidance in conjunction with OGC and the Office of Information Technology (OIT). It is the responsibility of each program office to monitor compliance.

Each District school or office shall be responsible for the school's or office's adherence to the requirements of Board Policy and records management processes, as well as for developing its own written protocol.

Any individual granted access to District records shall comply with Board Policy, the Employee Code of Ethics, and Acceptable Use Policy.

Mandatory Regulatory Procedures

For any record not covered by a records retention schedule, the Records Management Office, in consultation with the Chief Information Officer and OGC, as needed, shall determine how long the record shall be kept and recommend any necessary revisions to the retention schedule(s).

The District shall delete and/or dispose of records in a manner that protects any sensitive, proprietary, or confidential information or individual privacy rights, and helps conserve natural resources.

Contractors

Records created or maintained by contractors employed by the Board shall be retained and disposed of in accordance with the District's records management processes.[4]

Legal References:

1. [24 P.S. §5-518](#)
2. [65 P.S. § 67. 101-67.3104708](#)
3. [20 U.S.C. § 1232g](#)
4. [65 P.S. § 67.506](#)

Related Information:

[Administrative Procedures for Records Management](#)