

# SBDM RECORDS RETENTION SCHEDULE BASICS

*This handout has been adapted from requirements set in a much longer document. The original comes from the State Archives and Records Commission's Public Records Division. You can download the original document from <http://kdla.ky.gov/records/retentionschedules/Documents/Local%20Records%20Schedules/PublicSchoolDistrictRecordsRetentionSchedule.pdf> Updated March: 2017, Kentucky Dept. of Library and Archives*

<b>RECORDS TO BE KEPT PERMANENTLY</b>
Annual Financial Audit Report
Annual School Report
Budget Allocation to Council
Official Correspondence
School Council By-laws
SBDM Council Minutes
SBDM Council Committee Minutes
SBDM Council Policy
<b>RECORDS TO BE KEPT 5 YEARS</b>
Request for Waiver of Board Policy — 5 years, then destroy
School Council Policy Appeals — 5 years, then destroy
Annual Transformation Plan (CSIP) — 5 years, then destroy
<b>RECORDS TO BE KEPT 3 YEARS</b>
Budget Expenditure Report (3 years <b>AND</b> destroy after audit)
Request for Professional Development — 3 years, then destroy
Parent Council Member Election Records — 3 years, then destroy
Teacher Council Member Election Records — 3 years, then destroy
Council Member Training Record File — 3 years, then destroy
<b>RECORDS TO BE KEPT 2 YEARS OR LESS</b>
Routine Correspondence — <b>2 year requirement</b>
SBDM Council/Committee Meeting Notification – <b>1 year requirement, then destroy</b>