

Section 6000

ADMINISTRATION

TABLE OF CONTENTS

Goals	6000	
Superintendent		6100
Board/Superintendent Relations		6100P
District Organization		6200
Administrative Staff		
Duties and Qualifications of Administrative Staff Other Than Superintendent		6300
Employment Restrictions for Administrative Personnel		6310
Evaluation of Administrative Staff		6320
Professional Growth and Development		6330
Principals		6400
Pathogen Exposure Protection		6500
Retention of District Records		6600

School District

ADMINISTRATION

6000

Goals

The administrative staff's primary functions are to manage the District and to facilitate the implementation of a quality educational program. It is goal of the Board that the administrative organization:

1. provide for efficient and responsible supervision, implementation, evaluation and improvement of the instructional program, consistent with the policies established by the Board;
2. provide effective and responsive communication with staff, students, parents and other citizens; and
3. foster staff initiative and rapport.

The District's administrative organization shall be designed so that all divisions and departments of the District are part of a single system guided by Board policies which are implemented through the Superintendent. Principals and other administrators are expected to administer their facilities in accordance with Board policy and the Superintendent's rules and procedures.

Policy History:

Adopted on:

Revised on:

Jefferson School District No. #251

ADMINISTRATION

6100

Superintendent

Duties and Authorities

The Superintendent is the District's executive officer and is responsible for the administration and management of the District schools, in accordance with Board policies and directives and state and federal law. The Superintendent is hereby granted authority to act on behalf of the Board and the District in all administrative matters with the exception of those matters specifically reserved for the Board in law or rule for which there lawfully cannot be any delegation by the Board. The Superintendent is also authorized to develop administrative procedures to implement Board policy and to delegate duties and responsibilities. Delegation of power or duty, however, shall not relieve the Superintendent of responsibility for the action which was delegated.

Qualifications and Appointment

The Superintendent must be of good character and of unquestionable morals and integrity. The Superintendent shall have the experience and the skills necessary to work effectively with the Board, District employees, students, and the community. The Superintendent shall have a valid superintendent's endorsement.

When the office of the Superintendent becomes vacant, the Board will conduct a search to find the most capable person for the position. Qualified staff members who apply for the position will be considered for the vacancy.

Evaluation

The Board will conduct a written formal evaluation, at least annually, of the performance of the Superintendent, using standards and objectives developed by the Superintendent and the Board, which are consistent with the District's mission and goal statements. A specific time shall be designated for a formal evaluation session. The evaluation should include a discussion of strengths and weaknesses, as well as performance areas needing improvement.

At least fifty percent (50%) of the evaluation will be based on objective measures of growth in student achievement as determined by the Board. The Board has selected the following as the District's measure(s) of growth in student achievement for evaluating the Superintendent:

Each school year the district will create a district-wide "Pay for Performance" goal that will be included in each school play. The district goal will be used as the objective measure for the Superintendent's evaluation. If the district achieves .2 local shares then the superintendent will receive a proficient score on his evaluation in the area of student achievement. This will be combined with the criterion referenced portion of the evaluation to give an overall performance level for his evaluation.

Compensation and Benefits

The Board and the Superintendent shall enter into a contract approved by the State Superintendent of Public Instruction. This contract shall govern the employment relationship between the Board and the Superintendent.

Legal Reference: I.C. § 33-513 Professional personnel
Hancock v. Idaho Falls School District No. 91, No. CV-04-537-E-BLW, 2006
U.S. Dist. Ct. LEXIS 52243

Policy History:

Adopted on:

Revised on: July 11, 2012

School District

ADMINISTRATION

6100P

Board / Superintendent Relations

The Board shall:

Select the Superintendent and delegate to him/her all necessary administrative powers

Adopt policies for the operations of the school system and review administrative procedures.

Formulate a statement of goals reflecting the philosophy of the District.

Adopt annual objectives for improvement of the District.

Approve courses of study.

Approve textbooks.

Approve the annual budget.

Employ certificated and classified staff, in its discretion, upon recommendation of the Superintendent.

Authorize the allocation of certificated and classified staff.

Approve contracts for construction, remodeling, or major maintenance.

Approve payment of vouchers and payroll.

Approve proposed major changes of school plant and facilities.

Approve collective bargaining agreements.

Assure that appropriate criteria and

The Superintendent shall:

Serve as chief executive officer of the District.

Recommend policies or policy changes to the Board and develop procedures that implement Board policy.

Provide leadership in the development, operation, supervision and evaluation of the educational program.

Recommend annual objectives for improvement of the District.

Recommend courses of study.

Recommend textbooks.

Prepare and submit the annual budget.

Recommend candidates for employment as certificated and classified staff.

Recommend staff needs based on student enrollment, direct and assign teachers and other employees of the schools under his/her supervision; shall organize, reorganize and arrange the administrative and supervisory staff, including instruction and business affairs, as best serves the District, subject to the approval of the Board. Accept on behalf of the Board of Trustees resignations from any and all employees.

Recommend contracts for major construction, remodeling or maintenance.

Recommend payment of vouchers and payroll.

Prepare reports regarding school plant and facilities needs.

Supervise negotiation of collective bargaining agreements.

Establish criteria and processes for

processes for evaluating staff are in place.	evaluating staff.
Appoint citizens and staff to serve on special Board committees, if necessary.	Recommend formation of ad hoc citizens' committees.
Conduct regular and special meetings.	As necessary attend all Board meetings and all Board and citizen committee meetings, serve as an ex-officio member of all Board committees and provide administrative recommendations on each item of business considered by each of these groups.
Serve as final arbitrator for staff, citizens and students.	Inform the Board of appeals and implement any such forthcoming Board decisions.
Promptly refer all criticisms, complaints, and suggestions called to its attention to the Superintendent.	Respond and take action on all criticism, complaints, and suggestions as appropriate.
Authorize the ongoing professional enrichment of its administrative leader as feasible.	Undertake consultative work, speaking engagements, writing, lecturing, or other professional duties and obligations.
Approve appropriate District expenditures recommended by the Superintendent for the purpose of ongoing District operations.	Diligently investigate and make purchases that benefit the most efficient and functional operation of the District.

- **A copy of the Superintendent's evaluation may be included.**

Procedure History:

Promulgated on:

Revised on:

School District

ADMINISTRATION

6200

District Organization

The Superintendent shall develop an organizational chart indicating the channels of authority and reporting relationships for school personnel. These channels should be followed, and no level should be bypassed, except in unusual circumstances.

The organization of District positions of employment for purposes of supervision, services, leadership, administration of Board policy, and all other operational tasks shall be on a "line and staff" basis. District personnel occupying these positions of employment shall carry out their duties and responsibilities on the basis of line and staff organization.

Policy History:

Adopted on:

Revised on:

School District

ADMINISTRATION

6300

Duties and Qualifications of Administrative Staff Other Than Superintendent

Duty and Authority

As authorized by the Superintendent, administrative staff shall have full responsibility for the day-to-day administration of the area to which they are assigned. Administrative staff are governed by the policies of the District and are responsible for implementing the administrative procedures that relate to their assigned responsibilities.

Each administrator's duties and responsibilities shall be listed in the job description for that position.

Qualifications

All administrative personnel shall have a valid certificate and appropriate endorsements issued by the State Board of Education, and other qualifications as specified in the position's job description.

Administrative Work Year

The administrators' work year shall be the same as the District's fiscal year, unless otherwise stated in the employment agreement. In addition to legal holidays, the administrators shall have vacation periods as approved by the Superintendent.

Compensation and Benefits

All administrators shall be placed on a written contract approved by the State Superintendent of Public Instruction.

Legal Reference: I.C. § 33-513 Professional personnel.

Policy History:

Adopted on:

Revised on:

School District

ADMINISTRATION

6310

Employment Restrictions for Administrative Personnel

Time taken from the regularly assigned work schedule for such paid activities as consulting, college teaching, lecturing, etc., shall be subject to prior approval by the Superintendent.

The amount of time lost to the District will be, but is not restricted to be: deducted from vacation time; granted as additional personal leave as specified by board policy; or that time prorated to a dollar amount and that amount deducted from the next regularly scheduled pay period.

Time taken from the regularly assigned work schedule for non-paid activities shall follow the format established above.

Policy History:

Adopted on:

Revised on:

School District

ADMINISTRATION

6320

Evaluation of Administrative Staff

Each administrator shall be evaluated annually in order to provide guidance and direction to the administrator in the performance of his/her assignment. Such evaluation shall be based on the job description, accomplishment of annual goals and performance objectives, and established evaluative criteria.

The Superintendent shall establish procedures for the conduct of these evaluations. Near the beginning of the school year, the Superintendent shall inform the administrator of the criteria to be used for evaluation purposes, including the adopted goals for the District. Such criteria shall include performance statements dealing with leadership; administration and management; school financing; professional preparation; effort toward improvement; interest in students, staff, citizens and programs; and staff evaluation.

Both staff members involved in the evaluation conference shall sign the written report and retain a copy for their records. The person being evaluated shall have the right to submit and attach a written statement to the evaluation within a reasonable time following the conference.

Cross Reference: 6300

Duties and Qualifications of Administrative Staff Other Than Superintendent

Legal Reference: I.C. § 33-513
I.C. § 33-518

Professional Employees
Employee Personnel Files

Policy History:

Adopted on: July 13, 2011

Revised on: July 8, 2015

School District

ADMINISTRATION

6330

Professional Growth and Development

The Board recognizes that training and study for administrators contribute to skill development necessary to better serve the needs of the District. Each year the Superintendent should develop an administrative in-service program based upon the needs of the District, as well as the needs of individual administrators.

Administrative staff are encouraged to be members of and participate in professional associations which have as their purposes the upgrading of school administration and the

continued improvement of education in general.

Policy History:

Adopted on:

Revised on:

ADMINISTRATION

6400

Principals

Principals are the chief administrators of their assigned schools. The primary responsibility of principals is to supervise the operation and management of their assigned schools. They shall be under the direct supervision of the Superintendent and/or his/her designee. The majority of the principals' time shall be spent on curriculum and staff development through formal and informal activities establishing clear lines of communication regarding the school rules, accomplishments, practices, and policies with parents, students, and teachers. Principals are responsible for management of their staff, maintenance of the facility and equipment, administration of the educational program, control of the students attending the school, management of the school's budget, and communication between the school and the community.

Evaluation of Principals

Each principal shall receive at least one written evaluation to be completed no later than June 1st for each annual contract year of employment. Each principal evaluation shall use multiple measures that are research based and aligned to the State minimum standards based on the Interstate School Leaders Licensure Consortium (ISLLC) standards and include proof of proficiency in conducting teacher evaluations using the State's adopted model, the *Charlotte Danielson Framework for Teaching Second Edition*.

The process of developing criteria and procedures for principal evaluations will allow opportunities for input from stakeholders, including the Board, administrators, teachers, and parents/guardians.

Evaluation Objectives

The District's Principal Evaluation Program is designed to:

1. Maintain or improve each principal's job satisfaction and morale by letting him or her know that the Superintendent and/or his/her designee is interested in his or her job progress and personal development;
2. Serve as a systematic guide for planning each principal's further training and professional development;
3. Assure considered opinion of a principal's performance and focus maximum attention on achievement of assigned duties;
4. Assist in determining and recording special talents, skills, and capabilities that might otherwise not be noticed or recognized;
5. Assist in planning personnel moves and placements that will best utilize each principal's

capabilities;

6. Provide an opportunity for each principal to discuss job problems and interests with the Superintendent and/or his/her designee; and
7. Assemble substantiating data for use as a guide, although not necessarily the sole governing factor, for such purposes as wage adjustments, promotions, disciplinary action, and termination.

Responsibility

The Superintendent and/or his/her designee shall have the responsibility for administering and monitoring the District's Principal Evaluation Program and will ensure the fairness and efficiency of its execution, including:

1. Creating and implementing a plan for ongoing training and professional development and the funding thereof for principals in the District's Performance Evaluation Program, including evaluation standards, forms, procedures, and processes and a plan for collecting and using data gathered from the evaluation;
2. Creating a plan for ongoing review of the District's Principal Evaluation Program that includes stakeholder input from teachers, Board Members, administrators, parents/guardians, and other interested parties;
3. Creating a procedure for remediation for principals that receive evaluations indicating that remediation would be an appropriate course of action;
4. Creating an individualized evaluation rating system for how principal evaluations will be used to identify proficiency and record growth over time with a minimum of three rankings used to differentiate performance of principals including:
 - A. Unsatisfactory being equal to a rating of 1;
 - B. Basic being equal to a rating of 2; and
 - C. Proficient being equal to a rating of 3.

A fourth evaluation rating of Distinguished, being equal to "4," may be used in addition to three (3) minimum rankings at the discretion of the Board.

5. Completing Principal Evaluation annually, ensuring proper safeguards, and filing completed evaluations; and
6. Completing training on the District's Performance Evaluation Program.

Written Evaluation

A written evaluation will be completed for each principal by the Superintendent and/or his/her designee no later than June 1st for each annual contract year of employment. A copy will be given to the principal. The original will be retained by the Superintendent and/or his/her designee. The evaluation shall be reviewed annually and revised as necessary to indicate any significant changes in duties or responsibilities. The evaluation is designed to increase planning and relate performance to

assigned responsibilities through joint understanding between the Superintendent and/or his/her designee the principal as to the job description and major performance objectives.

The evaluation will identify the sources of data used in conducting the evaluation. Proficiency in conducting observations and evaluating effective teacher performance shall be included as one source of data.

Evaluation Measures and Criteria

Professional Practice: Principals must receive an evaluation in which a majority of the summative evaluation results are based on Professional Practice. All measures within the Professional Practice portion of the evaluation must be aligned at a minimum to the following Domains and Components based upon the Idaho Standards for Effective Principals.

Domain 1: School Climate: The principal promotes the success of all students by advocating, nurturing, and sustaining a school culture and instructional program conducive to student learning and staff professional development. The principal articulates and promotes high expectations for teaching and learning while responding to diverse community interests and needs.

1. **School Culture:** The principal establishes a safe, collaborative, and supportive culture ensuring all students are successfully prepared to meet the requirements for tomorrow's careers and life endeavors;
2. **Communication:** The principal is proactive in communicating the vision and goals of the school or District, the plans for the future, and the successes and challenges to all stakeholders; and
3. **Advocacy:** The principal advocates for education, the District and school, teachers, parents, and students and engenders school support and involvement.

Domain 2: Collaborative Leadership: The principal promotes the success of all students by ensuring management of the organization, operations, and resources for a safe, efficient, and effective learning environment. In collaboration with others, he or she uses appropriate data to establish rigorous, concrete goals in the context of student achievement and instructional programs. The principal uses research and/or best practices in student achievement, instructional programs, and improving the education program.

1. **Shared Leadership:** The principal fosters shared leadership that takes advantage of individual expertise, strengths, and talents, and cultivates professional growth;
2. **Priority Management:** The principal organizes time and delegates responsibilities to balance administrative/managerial, educational, and community leadership priorities;
3. **Transparency:** The principal seeks input from stakeholders and takes all perspectives into consideration when making decisions;
4. **Leadership Renewal:** The principal strives to continuously improve leadership skills through professional development, self-reflection, and utilization of input from others; and
5. **Accountability:** The principal establishes high standards for professional, legal, ethical, and fiscal accountability for self and others.

Domain 3: Instructional Leadership: The principal promotes the success of all students by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by the school community. The principal provides leadership for major

initiatives and change efforts and uses research and/or best practices in improving the education program.

1. **Innovation:** The principal seeks and implements innovative and effective solutions that comply with general and special education law;
2. **Instructional Vision:** The principal ensures that instruction is guided by a shared, research-based instructional vision that articulates what students do to effectively learn;
3. **High Expectations:** The principal sets high expectation for all students academically, behaviorally, and in all aspects of student well-being;
4. **Continuous Improvement of Instruction:** The principal has proof of proficiency in assessing teacher performance based upon the Charlotte Danielson Framework for Teaching Second Edition and aligns resources, policies, and procedures toward continuous improvement of instructional practice guided by the instructional vision;
5. **Evaluation:** The principal uses teacher/principal evaluation and other formative feedback mechanisms to continuously improve teacher/principal effectiveness; and
6. **Recruitment and Retention:** The principal recruits and maintains a high quality staff.

The evaluation will also include at least one of the following as a measure to inform the Professional Practice portion:

1. Input received from parents or guardians;
2. Input received from students;
3. Input received from teachers; and/or
4. Portfolios.

The District has chosen **1 and/or 3** as its measure(s) to inform the Professional Practice portion.

Student Achievement: Part of the evaluation must be based on multiple objective measures of growth in measurable student achievement. As defined in Section 33-1001, Idaho Code. This portion of the evaluation may be calculated using current and/or the immediate past year's data and may use one or both years of data.

Proof of Proficiency in Teacher Evaluations

Proof of proficiency in evaluating teacher performance shall be required of all individuals assigned the responsibility for appraising, observing, or evaluating certificated personnel performance. Proof of proficiency in evaluating performance shall be demonstrated by passing a proficiency assessment approved by the State Department of Education as a onetime recertification requirement prior to September 1, 2018.

Communicating Evaluation Results

Each evaluation shall include a meeting between the Superintendent and/or his/her designee and principal wherein the Superintendent and/or his/her designee will:

1. Discuss the evaluation with the principal, emphasizing strong and weak points in job performance. Commend the principal for a job well done if applicable and discuss specific corrective action if warranted. Recommendations should specifically state methods to correct weaknesses. Set mutual goals for the principal to reach before the next performance evaluation.
2. Allow the principal to make any written comments he or she desires. Inform the principal that he or she may turn in a written rebuttal/appeal of any portion of the evaluation within seven days and outline the process for rebuttal/appeal. Have the principal sign the evaluation indicating that he or she has been given a copy.

Rebuttal/Appeal

Within seven days from the date of the evaluation meeting with the Superintendent and/or his/her designee the principal may file a written rebuttal/appeal of any portion of the evaluation. The written rebuttal/appeal shall state the specific content of the evaluation with which the principal disagrees, a statement of the reason(s) for disagreement, and the amendment to the evaluation requested.

If a written rebuttal/appeal is received by the Superintendent within seven days, the Superintendent shall provide the principal with a written response within ten working days either amending the evaluation as requested by the principal or stating the reason(s) why the Superintendent will not be amending the evaluation as requested.

If the Superintendent chooses to amend the evaluation as requested by the principal then the amended copy of the evaluation will be provided to, and signed by, the principal and retained in the principal's personnel file.

If the Superintendent chooses not to amend the evaluation as requested by the principal then the evaluation along with the written rebuttal/appeal, and the Superintendent's response, if any, will be retained in the principal's personnel file.

Action

Each evaluation will include identification of the actions, if any, available to the District as a result of the evaluation as well as the procedure(s) for implementing each action. Available actions include, but are not limited to, recommendations for renewal of employment, non-renewal of employment, probation, and others as determined. Should any action be taken as a result of an evaluation to not renew a principal's contract the District will comply with the requirements and procedures established by State law.

Records

Permanent records of each principal evaluation will be maintained in the principal's personnel file. All evaluation records, including rebuttal/appeal documentation, will be kept confidential within the parameters identified in State and federal law regarding the right to privacy.

Reporting

Any subsequent changes to the District's evaluation plan shall be resubmitted to the State Department of Education for approval. The District shall report the rankings of individual principal evaluations annually to the State Department of Education.

Legal Reference: I.C. § 33-513
I.C. § 33-518
I.C. § 33-1001
IDAPA 08.02.02.121

Professional Personnel
Employee Personnel Files
Definitions
Local District Evaluation Policy – School Principal

Policy History:

Adopted on:

Revised on: December 13, 2017

Pathogen Exposure Protection

6500

In accordance with the OSHA Bloodborne Pathogen Standard, 29 CFR 1910, 1030, Jefferson County School District #251 authorizes the administration to design and implement rules to eliminate or minimize employee exposure to bloodborne pathogens which may be encountered in the work place.

The district plan will be in compliance with those rules outlined by the Occupational Health and Safety Division of the Idaho Department of Employment concerning employee protection from bloodborne pathogens potentially present in the work environment.

In addition to developing the district pathogen exposure plan, the committee shall assume general responsibilities associated with the administration of the Bloodborne Pathogen Exposure Plan. The plan will be considered a school district regulation and, following the approval of the Board of Trustees, all employees will be subject to its effect. The district will review the plan's effectiveness as frequently as is necessary, but no less than annually, to make recommendations for needed amendments.

Retention of District Records

6600

In compliance with Idaho Code § 33-506, the Board of Trustees establishes the following guidelines to provide administrative direction pertaining to the retention and/or disposal of district records.

Method Of Destroying Official Records

The district's official records, and any copy thereof that may be deemed to be confidential and/or not intended to be disseminated to the public, will be shredded before being disposed.

Suspending of Destroying Official Records

The district will immediately cease the destruction of all relevant records (even if destruction is authorized by an approved Retention Schedule) for the following reasons:

1. If the district receives a Freedom of Information Act (FOIA) request;
2. If the district believes that an investigation or litigation is imminent, or
3. If the district is notified that an investigation or litigation has commenced.

The Superintendent and Board Clerk are responsible for carrying out this policy.

If relevant records exist in electronic formats (such as email, digital images, word processed documents, databases, backup tapes, etc.) the district shall notify its information technology staff. Failure to cease the destruction of relevant records could result in penalties against the District.

District records shall be retained and/or disposed of as follows:

DISTRICT RECORDS RETENTION SCHEDULE

Retention Codes

AC—After closed, terminated, completed, expired, settled, or last date of contact

FE—Fiscal Year End (June 30th)

LA—Life of Asset

PM—Permanent

US—Until Superseded

RECORDS DESCRIPTION	RETENTION PERIOD
ADMINISTRATION —ATTENDANCE--ANNUAL ATTENDANCE SUMMARIES BY BUILDING	PM
ADMINISTRATION —ATTENDANCE—Enrollment attendance data	3 yr
ADMINISTRATION —BALLOTS AND OATHS OF ELECTION—until canvassed and recorded in the minutes	Not less than 8 months following election
ADMINISTRATION —BALLOTS FOR BOND ELECTIONS	a. Not less than 60 days after bonds have been delivered to purchaser b. Not less than 8 months following
ADMINISTRATION —CONTRACTS AND LEASES	AC +6 yr
ADMINISTRATION —GENERAL CORRESPONDENCE	3 yr
ADMINISTRATION —DONATION/GIFT RECORDS	PM
ADMINISTRATION —BOARD MEETINGS—AGENDA AND MINUTES: Official minutes and agenda of open meetings	PM
ADMINISTRATION —BOARD MEETINGS—CLOSED: Certified agendas or tape recordings of closed meetings	PM—Restricted Access
ADMINISTRATION —ORGANIZATION CHARTS: Any documentation that shows program accountability	PM
ADMINISTRATION —EDUCATION PROGRAM REVIEW RECORDS	AC+3 yr
ADMINISTRATION —OFFICIAL STATE DEPARTMENT REPORTS	PM
ADMINISTRATION —SCHOL CERTIFICATION REPORTS	PM
ANNUAL REPORTS	PM
APPEAL AND REVIEW RECORDS —Records may include but are not limited to narrative history or description of appeal; minutes and testimony; exhibits; reports and findings of fact; final orders, opinions, conclusions, or decisions; audio recordings; hearing schedules and lists of participants; and related correspondence and documentation.	PM
BOARD MEMBER RECORDS —Series documents board activities and serves as a reference source for board members. Records may include but are not limited to correspondence, plans, statements of goals and objectives, minutes, committee reports, budgets, financial statements, reports and other reference material. Records are often compiled in a notebook for each member.	AC+3 yr NOTE: Some materials may warrant long-term retention. These materials should be reviewed for archival materials.
BOARD RECORDS —Series documents the official proceedings of the board meetings. Records may include agendas; minutes; meeting notices; items for board action; contested case hearings schedules; committee reports; exhibits; and related correspondence and documentation. Records may also include audio recordings of meetings used to prepare summaries.	PM
COMPUTER SYSTEMS-BACKUPS —Backups on tape, disk, cd, dvd, etc. CAUTION: Records stored in this format can be subpoenaed during litigation.	US or 1 year
EQUIPMENT-HISTORY FILE —Equipment service agreements, includes maintenance agreements, installation and repair logs, etc.	LA+3 yr
EQUIPMENT MANUALS —Instruction and operating manuals	LA

EQUIPMENT WARRANTIES	AC+1 yr
FACILITIES OPERATIONS-APPRAISALS —Building or property	3 yr
FACILITIES OPERATIONS-BUILDINGS PLANS AND SPECIFICATIONS —Includes architectural and engineering drawings, etc.	PM For leased structures retain AC+2
FACILITIES OPERATIONS-BUILDINGS, CONSTRUCTION CONTRACT, INSPECTION RECORDS AND PROJECT FILES —Building construction contracts, surety bonds and inspection records, planning, design, construction records & all bids, etc.	LA
FACILITY OPERATIONS—DAMAGE REPORTS; LOST AND STOLEN PROPERTY REPORTS	FE+3 yr
FACILITY OPERATIONS-PROPERTY DISPOSAL RECORDS —Documenting disposal of inventoried property	PM
FACILITY OPERATIONS-PROPERTY MANAGEMENT SEQUENTIAL NUMBER LOGS —Property logs	US+3 yr
FACILITY OPERATIONS-SECURITY ACCESS RECORDS —Documents the issuance of keys, identification cards, passes, passwords, etc.	AC+2 yr AC=Until superseded, date of expiration or date of termination, whichever is sooner
FACILITY OPERATIONS-SURPLUS PROPERTY SALE REPORTS	PM
FACILITY OPERATIONS-UTILITY USAGE REPORTS	1 yr
FACILITY OPERATIONS-VEHICLE OPERATION LOGS	1 yr
FISCAL-ACCOUNTS PAYABLE/RECEIVABLE LEDGERS	FE+3 yr
FISCAL-ANNUAL FINANCIAL REPORTS	PM
FISCAL-ANNUAL OPERATING BUDGETS	FE+3 yr
FISCAL-APPROPRIATION REQUESTS —Includes any supporting documentation in the appropriation request	FE+3 yr
FISCAL-FINAL AUDIT REPORTS	PM
FISCAL-BANK STATEMENTS	FE+3 yr
FISCAL-CANCELLED CHECKS —Stubs/Warrants/Drafts	FE+3 yr
FISCAL-CAPITAL ASSET RECORDS	LA+3 yr
FISCAL-CASH RECORDS —Cash deposit slips; cash receipts log	FE+3 yr
FISCAL-DEEDS AND EASEMENTS —Proof of ownership and right-ofway on property	PM
FISCAL-detail chart of accounts —One for all accounts in use for a fiscal year	FE+3 yr
FISCAL-EXPENDITURE JOURNAL OR REGISTER	FE+3 yr
FISCAL-EXPENDITURE VOUCHERS —Travel, payroll, etc.	FE+3 yr
FISCAL-EXTERNAL REPORTS —Special purpose, i.e. federal financial reports, salary reports, etc.	FE+3 yr
FISCAL-FEDERAL TAX RECORDS —Includes FICA records	AC+4 yr AC=Tax due date, date the claim is filed, or date tax is paid whichever is later
FISCAL-FEDERAL FUNDING RECORDS —Title I; Chapter 2; Title VIB	FE+5 yr Or until all pending audits or reviews are completed
FISCAL—FEDERAL—USDA	AC+3 yr AC=submission of final expenditure
FISCAL-GENERAL LEDGERS; GENERAL JOURNAL VOUCHERS	FE+3 yr
FISCAL-GRANTS —State and Federal	AC+3 yr AC=End of grant or satisfaction of all uniform administrative requirements for the grant CAUTION: Retention requirements may vary depending on the specific federal funding agency

FISCAL-INSURANCE CLAIM FILES	AC+3 yr AC=Resolution of claim
FISCAL-INSURANCE POLICIES —all types	AC+5 yr AC=expiration or termination of policy according to its terms
FISCAL-LONG-TERM LIABILITY RECORDS —Bonds, etc	AC+4 yr AC=retirement of debt
FISCAL-RECEIPTS JOURNAL OR REGISTER	FE+3 yr
FISCAL-RECONCILIATIONS	FE+3 yr
FISCAL-REIMBURSABLE ACTIVITIES —Requests & approval for reimbursed expenses for travel, training, etc.	FE+3 yr
FISCAL-RETURNED CHECKS —Uncollectible warrants or drafts	AC+3 yr AC=After deemed uncollectible
FISCAL-SIGNATURE AUTHORIZATIONS — records authorizing an employee to initiate financial transactions for agency. Also, spending authority limits	US+FE+3 yr
LEGAL-LITIGATION FILES	PM CAUTION: May contain attorney/client privileged information
LEGAL-OPEN RECORDS REQUESTS —documentation relating to approved or denied requests for records under Idaho Public Records Law	PM
LEGAL-OPINIONS AND ADVICE —Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation	PM CAUTION: May contain attorney/client privileged information
NEWS OR PRESS RELEASES	PM
PERSONNEL-ACCUMULATED LEAVE ADJUSTMENT REQUEST — Used to create and adjust employee leave balances	FE+3 yr
PERSONNEL-APPLICATIONS FOR EMPLOYMENT — HIRED — Applications, etc required by employment advertisement	AC+5 yr AC=Termination of employment
PERSONNEL-APPLICATIONS FOR EMPLOYMENT — NOT HIRED —Applications, resumes, etc. required by employment advertisement	AC+2 yr AC=Date position is filled
PERSONNEL-BENEFIT PLANS	US+1 yr
PERSONNEL-COMPLAINT RECORDS —Complaints received and records documenting their resolution	FE+3 yr CAUTION: If a complaint becomes the subject of litigation, it is subject to a longer retention period
PERSONNEL-CORRECTIVE ACTION —those actions which do not affect pay, status or tenure and are imposed to correct or improve job performance	AC+3 yr AC=Termination of corrective action. CAUTION: If during the retention period these records are used to support personnel disciplinary action, the records should be retained according to Personnel Disciplinary Action series.
PERSONNEL-DISCIPLINARY ACTION DOCUMENTATION —those actions that affect pay or status. They include demotion, dismissal, etc.	AC+3 yr AC=termination of employment
PERSONNEL-EMPLOYEE STATEMENTS (Affidavits) —for insurance, personnel or other uses for which Administration has sought such statements	AC+3 yr AC=Termination of employment
PERSONNEL-EMPLOYEE BENEFITS —documents relating to selection of benefits other than insurance	US
PERSONNEL-EMPLOYEE COUNSELING RECORDS —Notes, etc. relating to job-specific counseling	AC+3 yr AC=Termination of counseling
PERSONNEL-EMPLOYEE DEDUCTION AUTHORIZATIONS — documents relating to all deductions of Pay	AC+3 yr AC=After termination of employee or after amendment, expiration or termination of authorization, whichever is sooner.

PERSONNEL-EMPLOYEE EARNINGS RECORDS	4 yr
PERSONNEL-EMPLOYEE INSURANCE RECORDS —District copy of selection records by employees of insurance offered by the District	US
PERSONNEL-EMPLOYEE RECOGNITION RECORDS —Awards, incentives, etc.	AC+3 yr AC=Termination of employment
PERSONNEL-EMPLOYMENT ANNOUNCEMENT	2 yr
PERSONNEL-EMPLOYMENT CONTRACTS	Original dates of hire +50 yr
PERSONNEL-EMPLOYMENT ELIGIBILITY —Documentation or verification of Federal report form INS I-9	AC+4 yr AC=Termination of employment, with a minimum of 4 years
PERSONNEL-EMPLOYMENT SELECTION RECORDS —all records that document the selection process: i.e. polygraph, physicals, interview notes, etc	2 yr CAUTION: Does not include criminal history checks
PERSONNEL-FORMER EMPLOYEE VERIFICATION RECORDS — minimum information includes name, social security number, exact dates of employment and last known address	Original date of hire +50 yr
PERSONNEL-GRIEVANCE RECORDS —review of employee grievances against policies and working conditions, etc. Includes record of actions taken.	AC+6 yr AC=final decision on the grievance
PERSONNEL-HIRING PROCESS—CRIMINAL HISTORY CHECKS — criminal history record information on job applications	AC+1 yr AC=After hiring decision made
PERSONNEL-JOB PROCEDURE RECORD/JOB DESCRIPTION —any document detailing duties of positions on position-by-position basis	US+3 yr
PERSONNEL-LEAVE STATUS REPORT —cumulative report for each pay cycle showing leave status	FE+3 yr
PERSONNEL-LIABILITY RELEASE FORM —statements of employees, patrons, etc. who have released the district from liability	PM
PERSONNEL-LICENSE AND DRIVING RECORD CHECK	US
PERSONNEL-OVERTIME AUTHORIZATION & SCHEDULE	2 yr
PERSONNEL-PAYROLL-DIRECT DEPOSIT APPLICATION/AUTHORIZATION	US
PERSONNEL-PAYROLL-INCOME ADJUSTMENT AUTHORIZATION ---used to adjust gross pay, FICA, retirement or compute taxes	3 yr
PERSONNEL-PERFORMANCE APPRAISAL	2 yr
PERSONNEL-PERSI ENROLLMENT FILE	6 yr from filing date
PERSONNEL-PERSI RECORD OF HOURS WORKED —Irregular help, half-time or greater	Date of hire +50 yr
PERSONNEL-PERSI TERMINATION RECORD	6 yr
PERSONNEL-PERSONNEL INFORMATION —documents that officially change pay, titles, benefits, etc.	2 yr
PERSONNEL-POLICY AND PROCEDURES MANUAL —any manual, etc. that establishes standard employment procedures	PM
PERSONNEL-RESUME-UNSOLICITED	1 yr
PERSONNEL-SICK LEAVE POL DOCUMENTATION —requests submitted, approvals, number of hours transferred in an out, etc.	FE+3 yr
PERSONNEL-TIME CARD AND TIME SHEET	3 yr
PERSONNEL-TIME OFF AND/OR SICK LEAVE REQUEST	FE+3 yr
PERSONNEL-TRAINING AND EDUCATIONAL ACHIEVEMENT RECORD-INDIVIDUAL —records documenting training, testing or continued education	AC+3 yr AC=Termination of employment
PERSONNEL-UNEMPLOYMENT CLAIM RECORD	3 yr
PERSONNEL-UNEMPLOYMENT COMPENSATION RECORDS	AC+3 yr
PERSONNEL-W-2 & W-4 FORMS	5 yr from date of termination
PERSONNEL—WORKER’S COMPENSATION POLICIES	AC+10 yr

	AC=expiration of policy
PROCUREMENT-PERFORMANCE BOND —bonds posted by individuals or entities under contract with District	PM
PROCUREMENT-PURCHASING LOG —Log, etc. providing a record of purchase orders issued, orders received, etc.	FE+3 yr
PROCUREMENT-BID DOCUMENTATION —includes bid requisition/authorizations, invitation to bid, bid specifications and evaluations	FE+3 yr CAUTION: If a formal written contract is the result of a bid, etc., the bid and its supporting documentation must be retained for the same period as the contract.
DISPOSITION LOG (listing records destroyed or transferred); CONTROL MATERIALS (indexes, card files, etc.); DESTRUCTION APPROVAL SIGN-OFFS	PM
SAFETY-ACCIDENT REPORTS	8 yrs* For Minors, 8 yrs after minor reaches age of 18
SAFETY-DISASTER PREPAREDNESS AND RECOVERY PLANS	PM
SAFETY-EVACUATION PLANS	PM
SAFETY-FIRE ORDERS —issued by fire marshal to correct deficiencies in compliance with the fire code	AC+3 yr AC=deficiency corrected
SAFETY-HAZARDOUS MATERIALS DISPOSAL RECORDS —Material safety data sheets must be kept for those chemicals currently in use that are affected by the Hazard d Communication Standard in accordance with 29 CFR § 1910.1200(g).	PM
SAFETY-INCIDENT REPORTS —Reports concerning incidents which, upon investigation, were of a non-criminal nature	3 yr (or 30 yr*) *Exposure records require 30 year retention per 29 CFR § 1910.1020(d)(ii)(B)Footnote(1)
SAFETY-INSPECTION RECORDS —Fire, safety, and other inspection records of facilities and equipment	AC+3 yr AC=Date o the correction of the deficiency, if the inspection report reveals a deficiency.
SAFETY-MATERIAL DATA SAFETY SHEETS	30 yrs after the end of use of the substance
SAFETY-WORKPLACE CHEMICAL LISTS	30 yr
STUDENTS—EDUCATION RECORDS —Student’s name, birth date, last address, dates of attendance, graduation date and grades earned	PM
STUDENTS—SPECIAL EDUCATION RECORDS —educational records, including eligibility documentation and IEPs	FE+5 yr
VEHICLE-INSPECTION, REPAIR AND MAINTENANCE RECORDS	LA+1 yr
VEHICLE-TITLE AND REGISTRATION	1 yr
VOLUNTEER RECORDS —records may include recruitment and selection records, volunteer personnel and intern personnel information forms, intern agreements, volunteer and intern time records, emergency notification forms, insurance documentation and correspondence	AC+3 yr AC=End of term of volunteer or intern
WEBSITE/WEB PAGES —INTERNET/INTRANET—system development documentation for initial setup; subsequent changes and content of pages	PM

In the event that district records do not correspond to any of the above listed categories, the Superintendent will determine the period of retention for a particular record.

Legal References: I.C. § 33-701(8) Fiscal Year—Payment and accounting of funds
I.C. § 33-407 Return of canvass of elections
I.C. § 33-508 Duties of Clerk

Policy History:

Adopted on: May 9, 2007

Revised on: