

# **PUBLIC RECORDS & RETENTION POLICIES**

**ChallengeU**  
Ohio Community School

The School will utilize the following procedures regarding the availability of public records. Any person may inspect or obtain a copy of the public records of the School during the regular business hours of the office in which such records are maintained. An Employee or representative will be present during inspection of the records. Except as required or authorized by state or federal law, the Board shall not limit or condition the availability of public records by requiring disclosure of the requestor's identity or proposed use of the records, or by asking the request to be put in writing, unless it first discloses to the requester that a) none of that information is mandatory and b) whether disclosure of that information or making the request in writing would enhance the ability to identify, locate or deliver the records sought by the requestor. The School may require disclosure of the requester's identity or the intended use of student directory information in order to ascertain whether the directory information is for use in a profit-making plan or activity, and no student directory information, if any has been designated, shall be released to or accessed by any person or group for use in a profit-making plan or activity.

The School maintains a database or list that includes the name and birthdates of all Board Members and employees employed by the School. The database or list shall be made available upon a public records request.

A viewer, or a requester of copies of public records, may purchase copies of the School's public records upon payment of a fee not to exceed the cost for reproduction, supplies, mailing, delivery, transmission and/or handling. When making copies or records available, the preparer shall notify the requester of redactions or make redactions plainly visible to the requester. The current fee for copies shall be set by Board resolution.

If a request for public records is ambiguous, or overbroad, or does not reasonably identify what public records are being requested, the request may be denied so long as the requester is informed of the manner in which records are maintained and accessed by the School. Each ultimate denial, in whole or in part, shall provide the requester with an explanation, including the legal authority, as to why the request was denied, and such reasons shall be put in writing if the initial request was put in writing. The Board does not waive its rights to additional legal authority of reasons for denial by way of its written explanation to a requester.

No public record may be removed from the office in which it is maintained except by a Board officer or employee in the course of the performance of his/her duties.

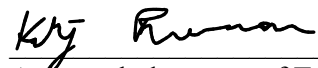
The Board or its designee shall 1) participate in training concerning public records which is required by the Ohio Attorney General and which is free of charge under section 109.43 of the Ohio Revised Code, 2) erect a poster about its public records policy in a conspicuous place in all locations or branches of operations (See **Appendix 147-A**), 3) require its employee in charge of public records to sign an acknowledgement of receipt of its public records policies, and 4) include its public records policy in its manuals or handbooks of general policies and procedures for all employees. In addition, as of February 1, 2016, all Board members and administrators must attend public records training annually

The Board authorizes the Principal or his or her designee to dispose of, on a daily basis, routine messages transmitted by means of voicemail or email, provided the messages do not alter existing School records.

Redacting, Encrypting, or Truncating Personal Information

An individual may request that his/her personal information, (social security number, federal tax identification number, driver's license or state identification number, individual checking account, saving account, or credit card number) which is made available to the general public on the internet, be redacted. The request must be made in writing on the form contained in **Appendix 147-B**. Within five business days of receiving the request, the School shall redact the personal information requested to be redacted, if practicable. If impracticable, then the School shall the individual with a verbal or written explanation of why the redaction is impracticable.

The School shall redact, encrypt or truncate the social security number of any individual whose social security number is contained in a document which is available to the general public on the internet. If the School becomes aware that an individual's social security number was mistakenly not redacted, encrypted or truncated, the School shall do so within a reasonable period of time. This requirement does not apply to documents that are only accessible through the internet with a password.

  
\_\_\_\_\_  
Acknowledgement of Employee or Designee  
in Charge of Public Records

SY 2024  
\_\_\_\_\_  
Date

*R.C. 149.43*

See Appendix 147-A Public Records Poster; Appendix 147-B Request to Redact Personal Information. See also Policy 325.1 Public Records.

## **147.1 Records Retention and Disposal Policy**

The orderly acquisition, storage and retention of School records and reports are essential for the overall efficient and effective operation of the School.

The Board President, Treasurer (fiscal officer), and Principal shall be Records Committee and meet annually to carry out the necessary work associated with the School's records. The procedures listed in **Appendix 147.1-A** shall guide them, as modified from time to time.

The Records Committee may not review or select for its custody either of the following:

- a. Records containing personally identifiable information concerning any pupil attending a public school other than directory information, as defined in section 3319.321 of the Revised Code, without the written consent of the parent, guardian, or custodian of each such pupil who is less than eighteen years of age, or without the written consent of each such pupil who is eighteen years of age or older;
- b. Records the release of which would, according to the "Family Educational Rights and Privacy Act of 1974," 88 Stat. 571, 20 U.S.C.A. 1232g, disqualify a school or other educational institution from receiving federal funds.

Records shall be destroyed only as directed by the Records Committee.

### **Email and Correspondence Retention**

The following retention policy for email and correspondence is endorsed by the Local Government Records Program of the Ohio Historical Society. In general, the policy is based on the premise that email does not constitute a category of records in and of itself. Rather email is a delivery medium, like paper or microfilm, and individual emails should be retained according to the information which is contained in the message. There are four categories of email and correspondence retention.

#### **1. Non-Record Materials** (delete immediately)

- A. Email messages and correspondence that do not meet the criteria of being a "public record" under R.C. 149.43, because they do not document the organization, functions, policies, decisions, procedures, operations or other activities of the office, may be deleted immediately. These emails include:
  - B. Personal correspondence.
  - C. Publications, promotional materials, and similar materials (unless specifically incorporated into other materials that are "records")

## 2. Official Records

### A. Transient Retention (Retain until no longer of administrative value)

#### i. Transitory messages of very limited administrative value.

(e.g., a message of an upcoming meeting only has administrative value until the meeting occurs; telephone messages; drafts, and other documents which serve to convey information of temporary importance in lieu of oral communication).

### B. Intermediate Retention

#### i. General Correspondence (Two years)

##### a. Internal Correspondence (letters, memos)

##### b. Correspondence from various individuals and organizations (requesting information or correspondence that is informative but does not attempt to influence policy)

#### ii. Routine Correspondence (One year)

##### a. Referral letters, requests for routine information, and requests for publications which are answered by standard form letters.

### C. Long term Retention

#### i. Executive Correspondence

##### a. Correspondence dealing with significant aspects of the administration of their offices. (e.g., information concerning agency policies, program, fiscal, and personnel matters).

## Storing Email Records

For purposes of record retention, it is acceptable to store emails: (1) in the current email system; (2) in an electronic format (e.g., in a file on a local hard drive); or (3) by saving paper print outs in a filing system.

In order to ensure that someone in the agency takes responsibility for maintaining the email record during the retention period, the School shall choose one of the following procedures:

X 1. The individual who sends an email maintains the “record” copy. If an email is received from someone outside the organization, the recipient should retain it.

X 2. A mailbox is created (i.e. admin@<School Name>) for individuals sending out email to copy (cc) when email is sent and retention will then be administered by the IT Department of the School or Management Company.

*RC 149.41; RC 149.351*

See Appendix 147.1-A Records Retention.

### **325.1 Public Records**

Public records are recorded accounts or information that are kept by the School for the conduct of School business and instruction. Any person may inspect the public records of the School during regular business hours of the office in which such records are kept, provided adequate advance notice is given to the custodian of the records. An Employee or representative will be present during the inspection of the records. A person may purchase copies of the School's public records upon payment of a fee, which is equal to the exact cost of making the copies. The School's public records may not be removed from the School except by an Employee who is authorized to do so.

*R.C. 149.43.*

See also Policy 147 Public Records Policy and Policy 147.1 Records Retention and Disposal Policy.