

Policy Reference No. 7010
Title: RECORDS MANAGEMENT
Section: BUSINESS SERVICES AND BUDGET

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Effective Date:

3 August 1999

RECORDS MANAGEMENTPROCEDURE

- 1.0 The Deputy Superintendent shall appoint a staff member to be responsible for records management in the district. Each district department head and school principal shall be custodian of the records of that unit. The custodian of each unit shall provide for:
 - 1.1 proper storage of the unit's records;
 - 1.2 retention for no less time than specified by the Records Management Manual and General Records Retention Schedules for School Districts in the State of Washington (hereinafter, state records manual);
 - 1.3 disposition when the retention period has expired.
- 2.0 To the extent that proper security and environmental conditions can be provided, each unit is encouraged to store its own records. Records must be stored in a location and manner that will ensure their security and preservation during the required period of retention. Records to be retained permanently must be stored in acid-free containers in metal cabinets or on metal shelving and be protected from fire, flood, bright light and excessive heat and humidity.
- 3.0 When records storage capacity, security or environmental conditions are beyond the capability of the unit's offices, the district shall provide storage facilities for permanent or long-term-retention paper records, short-term-retention paper records and microfilm. These facilities will be managed by the district records-retention specialist, under the direction of the staff member charged with records management in the district. In addition, records having historical value shall be sent to the regional state archives as specified in the state records manual. These records are to be submitted to the district records-retention specialist for transmittal to the archives. Requirements for the district storage facilities shall be as specified in 4.0, 5.0, and 6.0.
- 4.0 Permanent or long-term paper-records storage
 - 4.1 Only records designated as permanent by the state records manual, or as requiring retention for such an extended period of time that special storage conditions must be provided, will generally be accepted. The Deputy Superintendent may grant well-justified and limited requests for storage of other records.
 - 4.2 Records awaiting microfilming will be accepted.
 - 4.3 Storage shall be in four-drawer metal file cabinets to be furnished by the unit that originates the records.
 - 4.4 Each file drawer shall be labeled with the originating department, names of the records and, if applicable, dates of the records.

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- 4.5 A minimum ongoing storage of four drawers will be accepted from a department, unless the department does not have satisfactory storage conditions for long-term records.

- 5.0 Short-term paper-records storage (up to six years)
 - 5.1 Only records to be retained for a maximum of six years, then destroyed, will generally be accepted. The Deputy Superintendent may grant well-justified and limited requests for storage of records for longer periods of time.
 - 5.2 Each unit will be allotted space in this short-term storage area and shall be responsible for boxing, labeling, shelving and disposition of the records it wishes to store there.
 - 5.3 All records must be stored in standard archival boxes with a standard label that includes contents, date of origination of record, date of disposition and type of disposition (intact or shred).
 - 5.4 A minimum ongoing storage of six boxes will be accepted from a department. Fewer records should be stored in the originating office.

- 6.0 Microfilm storage
 - 6.1 Departments having voluminous records that must be retained permanently are encouraged to microfilm the records, with the approval of the Deputy Superintendent. Requirements that certain permanent records have microfilm backup, as specified in the state records manual, shall be met.
 - 6.2 Reel film or microfiche may be used, whichever is most appropriate for a given record, and filming may be performed by the district microfilm center or by a private vendor. Computer-output-to-microfilm (COM) is encouraged when feasible.
 - 6.3 Working copies of microfilm will be stored in the district microfilm center and/or the originating office, and a security copy of all microfilm shall be placed in the state archives.

Policy Reference No. 7450
Title: MANAGEMENT OF DISTRICT EQUIPMENT/MATERIALS
Section: BUSINESS SERVICES AND BUDGET

MANAGEMENT OF DISTRICT EQUIPMENT/MATERIALS

PROCEDURE

Employee Use of District Property

One of the major responsibilities of a public agency is the prudent stewardship of property owned by the public.

As a school district accepting this responsibility it becomes necessary to provide guidance to the staff and to inform the citizens of the district's position regarding the use of district property.

Use of district property is restricted to authorized district business and such other services as are available to the general public.

In trying to envision the various situations a district might find in the use of property, some would obviously be a blatant misuse of public property and therefore not acceptable; e.g., the use of a vehicle or of a copy machine or of a facility for personal gain or enjoyment.

Some situations involving use of district property are less clear and reasonable people will differ as to whether a situation presents a misuse. The following guidelines are provided in these cases.

1. If a question arises as to whether the use of district property is appropriate in a given situation, the administrator charged with the responsibility for the property will be consulted.
2. In all cases, use of district property shall not expose the user to a safety hazard beyond an acceptable level nor promote a serious liability situation.
3. In addition, the administrator, before making a decision, will apply the following tests. If the request for use fits one or more of the tests, and the administrator is satisfied with having a true picture of the intended use, then authorization to use the property as described may be granted.

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Tests for determining whether use of district property may be authorized:

- A. Will the intended use of the district property directly and significantly benefit the students of the Bellevue School District?
- B. Is the use of the property directly and significantly related to assigned function of the individual?
- C. Will the use of the district property lead to the improvement of the performance of a staff member in the current assignment or an identified future assignment of the individual within the Bellevue School District?
- 4. Use of district property for other than authorized district business is available to all staff in the same way as use of district property is available to the general public.

Lease or Rental of District-owned Equipment and Materials

The following procedures are provided to guide in the leasing and renting of district equipment and materials:

- 1. The Bellevue School District shall have priority in use of district-owned equipment and materials.
- 2. All parties wishing to lease or rent either equipment or materials from the Bellevue School District will be required to sign a lease/rental agreement which contains at least the following:
 - A. Agreement to hold harmless the Bellevue School District from all liabilities resulting from use of said equipment or materials;

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- B. Agreement to replace any lost equipment or materials with equipment or materials of equal value, or to restore to the satisfaction of the District any damaged equipment or material to the condition at the time of loan;

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- C. Agreement to certify that the equipment or material is being used for community benefit, public purpose, or in a nonprofit activity and to specifically state for what activity the equipment or material will be used;
 - D. Agreement to pay, at the time specified, the rate indicated for lease or rental of equipment or material;
 - E. Agreement to return said equipment or materials at the time and place specified on the agreement.
- 3. Lessees or renters shall be responsible for picking up and returning equipment or material on loan.
 - 4. Deposits may be requested for the loan of any district equipment or materials.
 - 5. Where equipment or materials is past due, a penalty fee of three times the agreed upon lease or rental fee may be charged.
 - 6. District equipment or materials may be leased or rented to a party only after approval for such action has been granted by the building principal or department administrator responsible for said equipment or materials.
 - 7. Billing Procedures:
 - A. Payment will be required prior to pick up, where cost of lease or rental does not exceed \$25.
 - B. Where cost of lease or rental exceeds \$25 and/or the lessee or renter has not paid at the time of pick-up, billing will be required.
 - C. Where billing is required, the district unit issuing the rental agreement shall submit the second copy of the agreement to the Business Office for processing.

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- 8. Revenue generated from the lease or rental of equipment or materials will be credited to the account of the unit responsible for replacing and/or maintaining the equipment or material.
- 9. A knowledgeable operator must be assured by the applicant when equipment is to be used. In the case of highly technical equipment, the district may furnish an operator at the lessee's or renter's expense.
- 10. Those units responsible for the equipment or materials to be loaned will determine the rates to be applied.

In determining rates, each unit will take into consideration such factors as:

- A. Cost of processing lease/rental agreement;
- B. Cost of preparation of equipment or materials for lease or rental;
- C. Cost of depreciation;
- D. Cost of maintenance;
- E. Cost of insurance;
- F. Cost of cleaning and restoring upon return of equipment or materials.

Reference: RCW 28A.58.040

Prepared by: _____
Signature

Approved by: _____
Howard M. Johnson

Title: _____

Title: Assistant Superintendent

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