

**MONTGOMERY  
COUNTY  
INTERMEDIATE  
UNIT #23**

SECTION: OPERATIONS  
TITLE: RECORDS MANAGEMENT  
ADOPTED: June 26, 2019  
REVISED:

<p>1. Purpose</p> <p>2. Authority</p> <p>SC 518, 914-A</p> <p>65 P.S. Sec. 67.901</p>	<p style="text-align: center;">800. RECORDS MANAGEMENT</p> <p>The Board recognizes the importance of establishing and maintaining a Records Management Plan that defines responsibilities of Intermediate Unit staff and complies with federal and state laws and regulations.</p> <p>The Executive Director or the Executive Director's designee shall develop such Administrative Regulations as are necessary and appropriate to ensure compliance with applicable federal and state laws and regulations and which provide for the enhanced efficiency of Intermediate Unit operations.</p> <p>The Administrative Regulations shall provide guidelines to assist employees in determining what information/documents/data should be retained and what information/documents/data need not be retained and creating guidelines for appropriate uses of particular means of communication.</p> <p>The Board directs the Executive Director to retain as a permanent record of the Intermediate Unit, 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 Intermediate Unit for a period of not less than six (6) years.</p> <p>The Intermediate Unit receives and generates volumes of information in both electronic form and hard copy. Not all information received constitutes a "record" that the Intermediate Unit will retain for an extended period of time.</p> <p>The Intermediate Unit shall make a good faith effort to comply with all proper requests for record production. Selective destruction of records in anticipation of litigation is forbidden.</p> <p>References:</p> <p>School Code – 24 P.S. Sec. 433, 518, 914-A</p> <p>Right-to-Know Law – 65 P.S. Sec. 67.101 et seq.</p>
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Family Educational Rights and Privacy Act – 20 U.S.C. Sec. 1232g

Federal Rules of Civil Procedure – 16, 26, 34, 37, 45