

Illinois Mathematics and Science Academy Records Retention Plan

November 12, 2018

Brief History

State of Illinois passed the State Records Act in 1957 to provide a method for State Agencies to legally preserve and dispose of public records. The Act established a set of compliancy guidelines for all Illinois State agencies to follow. In summary, the guidelines:

- Defined Public Records Items — (Student surveys; health records, POs, contracts, etc.)
- Established State Records Commission (SRC) authority
- SRC approves/denies recommendations and records destruction
- Records must be accessible to the public

Three Major Components of the Act

1. No record may be destroyed without approval
2. Agencies must designate a Records Retention Officer
3. State provides records management expertise and technological assistance

IMSA's Records Retention Plan

The Records Retention Plan was updated in 2018 under the direction of designated Records Retention Officer and Office of Institutional Research Executive Director Dr. Amber Pareja. IMSA's plan was approved on August 16, 2018 and filed with the State Records Committee. All IMSA records stakeholders have been informed of the approved plan, including the retention schedule and process to follow for records destruction.

General Guidelines

Departments conduct annual records inventory to determine changes needed to the Academy's Records Retention Schedule. The inventory consists of:

- Updating/revising/adding/removing applicable paper and digital records listed in the Schedule
- Staff need to complete and send the Application for Authority to Dispose of State Records form to Laurie Craig for processing to the State.

General Timelines

A records inventory will begin every April to allow sufficient time for any necessary revisions which need to be sent to the SRC for approval for necessary actions. After approval from SRC, documents that meet their retention period may be destroyed. Shredding service costs may be coordinated and shared among departments. Shredding will typically be scheduled for early July.

An annual review of the Academy's records ensures compliance with legal and regulatory recordkeeping requirements and minimizes storage requirements.

Laurie Craig, Administrative Assistant in the Office of Institutional Research (OIR), is the point of contact and is available to assist staff with any questions about records retention or destruction.

The full Records Retention Manual and Schedule is attached for future reference.