

*The following School District 57 (Prince George) memo—for planning purposes only—was distributed at a May 2002 meeting to discuss school closures/amalgamations. BCSSA has reprinted excerpts of three memos from the district’s school operations office with guidelines on school library closures, school office closures and school closure financial issues. Many thanks to School District 57 for sharing this information with BCSSA members. Note: Original memo references to names of individuals and schools in the district do not appear on these pages.*

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## **SUBJECT: GENERAL GUIDELINES FOR PACKING UP SCHOOL OFFICE RECORDS**

Sufficient labels for boxes, for each affected school, will be distributed by June 11. Box labels will be 8 x 11 coloured paper. Please use the appropriate coloured labels when boxing up files and attach to the “narrow” side of the box. This will ease the transfer of boxes to the receiving school. The following colours have been designated for labels:

- Pink – active students records
- Salmon – inactive student records
- Green – financial records
- Blue – general office correspondence
- Yellow – shredding/destroying

Note: All boxes must also have attached, to the “wide” side of the box, the standard “fluorescent orange” shipping destination label, as is attached to all boxes requiring movement.

For the purposes of these guidelines, the term “primary” receiving school will be the school that is receiving the majority of transfers from the closing school.

**Student Records** (to be packaged by June 28):

**Weed student files**, where possible.

**Content of student files** - be sure the following items are included:

- Registration/Verification form
- FOIPOP permission form
- Medication form
- L/A folder should be put in student’s folder (the L.A. folder can be removed at the receiving school)

**Red Files** – to be sent to Area Support Team. The team will forward files, where necessary.

**Preparing student files boxes** - please consider the following:

- All files should be sorted in **GRADE** order
- As well, provide an alpha name and grade list for the receiving school secretary

**In and Out Record** – forward this file or binder to the “primary” receiving school.

**Inactive files** – files older than this school year (2001-02) will be picked up from the school and delivered to the central warehouse. All inactive files that are less than a school year (2001-02 school year) will be delivered to the “primary” receiving school.

**“Student Management System” Computer** – this computer will be sent to the “primary” receiving school. At a later date, TBA, once all relevant data has been transferred and non-relevant data has been deleted, the receiving school will determine the final disposition of the computer.

**Turbo School backup disks** – when preparing backup disks, select “OPTION 2” in Turbo School Utilities Backup to create disks for all years on the school computer. As well, prepare backup disks for years not on the school computer.

**Financial Records** (to be packaged by July 5):

**Trust Account files** – files from July 1995 to June 2002 must be transferred to the “primary” receiving school. Attach the year-appropriate label to boxes that you have already boxed up, in prior years (ex. 1995-1996). It is not necessary to “re-box” files, but a label must be secured on the box to provide clarity for the receiving school and for audit purposes.

**SDS Account files** – files for July 2001 to June 2002 must be boxed up with appropriate labels and transferred to “primary” receiving school. Previous years may be destroyed as the original documents are kept in the Finance department.

**Guidelines for financial issues upon school closures** – please refer to memo re financial issues.

**General Office Correspondence** (to be packaged by July 5):

Review all general office correspondence. Determine what files or documents will need to be transferred to the receiving school and prepare boxes with appropriate labels.

**Shredding/Destroying Files** (to be packaged by July 5):

Schools may have files or documents that need to be shredded/destroyed, as opposed to recycled. Please attach appropriate labels to all boxes that need to be picked up for destruction. Leave boxes in the office area at the closing school.

Our district has definite obligations under the *School Act, Freedom of Information and Protection of Privacy Act* and District Records Management Program.

### **Additional Information**

A representative from the Retired Teachers’ Association may contact your school for information that they feel is of heritage value. Please consider this when purging files.

June 2002

## **ASSET DISTRIBUTION FOR SCHOOLS INVOLVED IN AMALGAMATIONS**

Note: Determination of Schools to be closed will be made at the July 2, 2002 Board Meeting. This memo is for “planning purposes” only. Assets should only be distributed after the July 2, 2002 closure decisions are made by the Board of School Trustees.

- A general “rule of thumb” is that schools who are designated as the new “catchment” schools will have the first opportunity to receive assets from a school to be closed. Further, if there is more than one new “catchment” school designated, the “default position” for the distribution will be in proportion to the students slated for attendance at the new schools in September 2002.
- The “default position” should be used as a guide and with the agreement of the principals involved (sending school and designated catchment schools) may be modified. Depending on the asset, others such as the PAC may have input into the decision before it is finalized. In the case of network infrastructure devices such as managed switches and servers, equipment not required by the designated catchment area school(s) will be distributed, based on advice from the District Technology Support Coordinator, to another school affected by amalgamation.
- In the event that an agreement between school principals is not reached, the default position list will be used.
- Assets may involve instructional equipment and supplies, learning resources or school operating funds. Generally, assets that are “permanently attached” are not included. There are exceptions however, such as playground equipment that has been initially funded by a PAC. Note that trust fund disbursements must be in keeping with the terms of reference for the trust fund.
- Please refer to other memos in the “Amalgamation Folder” for further details on the process of selecting and distributing assets. The focus of this memo is on the default position for the % distribution between designated catchment schools.
- For further information, please contact your assistant superintendent. Non-designated school names have not been included in the distribution formula but the total number of students attending non-designated catchment area schools has been included for background information.