

**Virginia Public Schools Records Consortium (PSRC)**

Chair: Nicholas Minor [MinorN@pwcs.edu](mailto:MinorN@pwcs.edu) (Prince William County)

Library of Virginia, 800 E. Broad St. Richmond, VA 23219  
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**PSRC Meeting Minutes**  
**Wednesday, December 11, 2024**  
**10:00 AM-1:00pm**

**Meeting format: Hybrid (In-Person & Virtual)**

**Agenda:**     **1. PSRC – 2025-26 Planning & Webpage**  
                  **2. Professional Connections**

**Welcome and introductions: (in attendance)**

Name	Organization	Name	Organization
Alexandria Ferguson	City of Virginia Beach	Laura Beth Mattson	Virginia Beach City
Amy Heaton	Gloucester	Lois Ritger	City of Virginia Beach
Angela Flowers	Portsmouth	Mandy Zayatz	Manassas City
Becky Moore	Fauquier	Meade Harris	Albemarle
Bliss Cruz	Culpeper	Michelle Brittigan	Albemarle
Bonita Albergottie-Pugh	Portsmouth	Nicholas Minor	Prince William
Camm Taylor	Fredericksburg City	Pam Stewart	Loudoun
Carolyn Karawa	Fairfax	Patty Massengill	Dinwiddie
Deyrni		Roberts Scruggs	Pittsylvania
Hollye Brown	Colonial Beach	Sara Morand	Culpeper
Jeff Wick	Caroline	sdavis	
Jennifer Test	York	Shannon Berna	Fredericksburg City
Julia Green	Charlottesville City	Tammy Norman	Stafford
Julie Taylor	Galax City	Teshawna Threat	Library of Virginia
Katina Keener	Gloucester	Tracey Beaver	Prince William

**Scheduled 24-25 Meetings. (Four meetings per school year)**

In-person physical meeting location:

**Library of Virginia, 800 E. Broad St. Richmond, VA 23219**

- The meeting format will include Virtual Access (Online) at all meetings and Hybrid to include on-site as agreed for each meeting.
- Meetings are from 10am to 1pm with the Library of Virginia room scheduled until 2pm.

**Meeting Chair:**

Nicholas Minor, Prince William County Schools

**Meeting Coordinator - Planning & Speaker Outreach:**

Pam Stewart, Loudoun County Schools

**Minutes:**

Meade Harris, Albemarle County Schools

**Schedule**

**October 9, 2024 (Hybrid Format)**

**December 11, 2024 (Hybrid Format)**

**February 12, 2025 (Format TBD)**

**April 30, 2025 (Format TBD)**

**PSRC notes and agendas will be shared via the Library of Virginia**

**PSRC website:** <https://www.lva.virginia.gov/agencies/records/psrc/>

The meeting minutes from **October 9, 2024** were unanimously approved. However, due to the late posting and unavailability of the minutes prior to the meeting, we will conduct a second approval at the February 12, 2025 meeting.

Additionally, the **December 11, 2024 meeting minutes** will also be presented for approval provided they have been posted in a timely manner in advance of the February meeting.

## Meeting discussion:

Nicholas Minor began discussions regarding PSRC Leadership for the FY2025-26 school year.

- Current roles:
  - Nicholas Minor, Chair
  - Pam Stewart, Planning
  - Meade Harris, Meeting notes
- Nicholas and Pam will be stepping down from their current roles. Nicholas can help with the planning role if needed.
- Most important is having someone to step up as Chair for next year.
- We only have 2 meetings remaining this school year
- We need to have volunteers come forward for appointment before the end of the current school year.
- Anyone who wants to serve in any role for next year, please email Nicholas - [MinorN@pwcs.edu](mailto:MinorN@pwcs.edu)
- Expert subject knowledge is not required, the team meets 4 times per year between meetings to establish an agenda and plan meetings.
- Background info, the PSRC went dormant during COVID and restarted this year. Attendance and interest in general has been much higher with the virtual meeting option introduced this year.

## Library of Virginia – PSRC Webpage discussion.

Teshawna Threat (T) from the Library of Va has been working on resource efficiencies with the Library's IT staff. Meeting Agendas, notes and presentations that are over 5 years old are being removed. The current year and 4 prior years will be retained and visible. The older presentations will be archived offline and will still be available from the Library of Virginia on request.

We thank the Library of Virginia for providing this resource to the PSRC.

Nicholas asked for a motion to adopt the 5-year retention plan as discussed. Meade made the motion to adopt and Pam Stewart seconded the motion. It was adopted without objection.

Today's meeting was for members to get to know each other, see how

## **Addendum 1 – Caroline County Public Schools**

### **Retention and Disposition Chart**

The following page has an image of the spreadsheet provided by Jeff Wick of Caroline County Public Schools as requested by members during the Professional Connections Networking meeting session.

Additionally, the spreadsheet document will be uploaded to the [Library of Virginia PSRC website](#).

Awards Lists and Documentation	1 ~school yr.	Non-Confidential	Activity Sponsors	GS-21	008132
Honor Society Apps/References	0 ~school yr.	Confidential	Activity Sponsors	GS-21	008127
Participation in Interscholastic Act's Records	1 ~school yr.	Confidential	Activity Sponsors	GS-21	008154
Student Accident Reports	23 ~after birth	Confidential	Activity Sponsors	GS-21	008198
Curricula/Programs of Study	0 ~obsolete	Non-Confidential	Alt. Ed. Teachers	GS-21	008175
Student Cumulative File: Short-term	5 ~separation	Confidential	Alt. Ed. Teachers	GS-21	008224
Copyright Material Use Permission	5 ~use	Non-Confidential	Band; Drama Tchrs	GS-21	008174
Participation in Interscholastic Act's Records	1 ~school yr.	Confidential	Band; Drama Tchrs	GS-21	008154
On-site Hazardous Chemical Records	30 ~removal	Non-Confidential	Chemistry Tchr.	GS-16	005192
Minutes: Committees/Offices	3 ~calendar yr.	Non-Confidential	Committee Chair	GS-19	010030
Student Cumulative File: Short-term	5 ~separation	Confidential	Driver's Ed. Tchrs.	GS-21	008224
ESL Records	5 ~leaving sch.	Confidential	ESL Teachers	GS-21	008219
Curricula/Programs of Study	0 ~obsolete	Non-Confidential	Health/PE Teachers	GS-21	008175
Reading/Math/Academic Risk Assessments	3 ~school yr.	Confidential	IEP Case Managers	GS-21	007109
SPED Eligibility Meeting Agendas	2 ~school yr.	Confidential	IEP Case Managers	GS-21	008216
SPED Eligibility Meeting Committee Members	0 ~obsolete	Confidential	IEP Case Managers	GS-21	008217
Special Education Records	7 ~separation	Confidential	SPED Coord.	GS-21	200683
Grade Books/Reports Assoc. w/Graduation	5 ~school yr.	Confidential	ITRTs	GS-21	008151
Grade Books/Reports not Assoc. w/Grad.	1 ~school yr.	Confidential	ITRTs	GS-21	200317
SPED Eligibility Meeting Agendas	2 ~school yr.	Confidential	Psychologists	GS-21	008216
SPED Eligibility Meeting Committee Members	0 ~obsolete	Confidential	Psychologists	GS-21	008217
Special Education Records	7 ~separation	Confidential	SPED Coord.	GS-21	200683
Threat Assessments: All documentation	5 ~separation	Confidential	Psychologists	GS-21	200315
Court Notices: Discipline by School	5 ~separation	Confidential	Social Worker	GS-21	008230
Court Notices: No discipline by School	3 ~event	Confidential	Social Worker	GS-21	008229
Court Notices: Serious Crimes	0 ~separation	Confidential	Social Worker	GS-21	200313
Student Due Process Records: School and Court	5 ~separation	Confidential	Social Worker	GS-21	008232
Subpoenas	1 ~receipt	Confidential	Social Worker	GS-21	009537
Threat Assessments: All documentation	5 ~separation	Confidential	Social Worker	GS-21	200315
Reading/Math/Academic Risk Assessments	3 ~school yr.	Confidential	SPED DCs	GS-21	007109
Student Cumulative File: Short-term	7 ~separation	Confidential	SPED DCs	GS-21	008224
Publications: Materials to Produce	0 ~obsolete	Non-Confidential	Sponsor	GS-19	010086
Release Forms to Participate in Program: Adults	5 ~calendar yr.	Confidential	Sponsor	GS-19	010022
Release Forms to Participate in Program: Minors	23 ~birth	Confidential	Sponsor	GS-19	010026
Routine Reports not Listed	0 ~useful	Non-Confidential	Sponsor	GS-19	010096
Anecdotal Notes on Students	0 ~school yr.	Confidential	Teachers	GS-21	008126
Final and Routine Exams	1 ~school yr.	Confidential	Teachers	GS-21	200506
Grade Books/Reports not Assoc. w/Grad.	1 ~school yr.	Confidential	Teachers	GS-21	200317
Grade Books; Reports Assoc. w/Graduation	5 ~school yr.	Confidential	Teachers	GS-21	008151
Grades; Grade changes; Interims; P/F Req.	0 ~school yr.	Confidential	Teachers	GS-21	200316
Lesson Plans and Instructional Materials	0 ~obsolete	Non-Confidential	Teachers	GS-21	008167
Other Programs Opt-Out Forms	0 ~school yr.	Confidential	Teachers	GS-21	200314
Parent Req. to withdraw from Instruc. Mat.	5 ~school yr.	Non-Confidential	Teachers	GS-21	008156
Permission Forms	0 ~school yr.	Confidential	Teachers	GS-21	008128
Student Attendance: Tchr/Attend. Clerk Records	5 ~school yr.	Confidential	Teachers	GS-21	008160
Student Cumulative File: Short-term	5 ~separation	Confidential	Teachers	GS-21	008224
Student Elections: Ballots; Voters	0 ~school yr.	Confidential	Teachers	GS-21	008143
Student Elections: Officers Elected	1 ~school yr.	Non-Confidential	Teachers	GS-21	008142
Student Emergency Health Care Plans	0 ~useful	Confidential	Teachers	GS-21	008197
Student Work	0 ~school yr.	Non-Confidential	Teachers	GS-21	008125
Subpoenas	1 ~receipt	Confidential	Teachers	GS-21	009537
Reading Folders: Samples; Test Results	1 ~last action	Confidential	Teachers: Elementary	GS-21	008163

## **Addendum 2 - Closed Caption for meeting presentations.**

Addendum cording has been started.

10:12:18 So we want to welcome everyone to the meeting. Thank you all for

10:12:22 logging on and participating or being here in person.

10:12:28 We're going to forego our normal going around and introducing ourselves since we have the networking session and everybody

10:12:35 if they want to, we'll have the floor.

10:12:37 We're going to just allow everybody to do that during their time to speak and

10:12:42 Tell us about themselves in their school division.

10:12:47 If you don't wish to participate as far as

10:12:50 speaking, you can just introduce yourself and tell us who you are and where you're from just so we have it for the record and for the

10:12:56 minutes.

10:12:59 We're going to skip over the october

10:13:03 minutes because we don't have them yet. So we'll just revisit that at our next meeting we can

10:13:08 Take a look at the minutes and approve those. We have them. We have them. They were sent to us. Did you want to do that?

10:13:16 later in the meeting.

10:13:18 We can do it now.

10:13:21 Okay.

10:13:22 I just wonder where they were there, but thanks, T. Absolutely.

10:13:28 You can tell when I log off in the afternoon, I don't check until check my email until I get back in the office.

10:13:35 So yeah, we can, if somebody wants to make a motion, if they've had a chance to take a look at those minutes and um

10:13:46 Yeah, go ahead. I motion to proceed with the October 2024 meeting minutes.

10:13:55 Do I have a second?

10:14:03 I'll second the most.

10:14:06 That was T with the motion and Pam with the second.

10:14:12 Any discussion?

10:14:16 Hearing none, the minutes are approved for October, and then we'll get those posted on the

10:14:23 The LVAPSRC webpage.

10:14:31 I want to talk a little bit about leadership for the PSRC for the

10:14:36 for the next school year for 2526.

10:14:39 We do need to start that.

10:14:41 discussion now because we only have after this meeting we have two more

10:14:47 meetings before the end of the year.

10:14:51 So this year we have this year

10:14:53 had about three people, myself.

10:14:55 As the chairperson.

10:14:58 Pam Stewart from Loudon. She helped us with planning and then me.

10:15:02 is taking notes and producing the minutes for the meeting.

10:15:08 meet.

10:15:09 Meet Harris from Aemarle.

10:15:13 We do want to solicit volunteers.

10:15:16 new volunteers, if anybody wants to step up

10:15:19 I know Pam and I had discussed stepping away from our current roles

10:15:25 I would be happy to stay on as



10:15:28 in a planning capacity, but we are looking for a new chairperson to run the meetings.

10:15:34 schedule the meetings and lead the meetings.

10:15:38 And we've been doing pretty good, I think, with the three people team.

10:15:42 So if there's anybody that is interested.

10:15:46 please reach out to

10:15:52 reach out to me through email or email

10:15:55 contact by phone.

10:15:58 It doesn't take a lot of your time and don't feel like you have to be the expert subject expert in the area.

10:16:06 We roughly just to give you a background, we have four meetings a year.

10:16:10 And then we were doing

10:16:13 having one planning meeting before those meetings with all three of us.

10:16:17 And all three of us have helped plan.

10:16:22 And really put the meetings together.

10:16:24 So if there's anybody...

10:16:27 that feels the need to do that for next year.

10:16:30 please let me know. And I do want to say that

10:16:35 The meetings don't run themselves.

10:16:38 It takes the team and it takes all of you attending

10:16:44 But a little background during COVID or after COVID or during the COVID pandemic, the group kind of went dormant for a while.

10:16:51 And we were able to get it going again.

10:16:54 kind of really increased attendance based upon when we came back.

10:16:58 having the virtual option and

10:17:01 having

10:17:01 an avenue for more people to attend that weren't in the Richmond or near the Richmond area that can come in person.

10:17:08 So I'm really excited that we did get it.

10:17:11 going again and that people are participating and we hope that we can keep it going.

10:17:18 Is there any discussion on that topic as far as

10:17:23 You don't have to volunteer right now, but if you wanted to speak or share something on that.

10:17:27 about going forward into next year, please.

10:17:32 go ahead and speak up at this point.

10:17:47 All right. Hearing none we're going to

10:17:50 Move on.

10:17:53 I wanted to talk a little bit about the PSRC LVA webpage

10:17:58 So on October, well, the end of October.

10:18:02 Deshauna contacted me regarding the

10:18:06 library and they're updating their web pages and they wanted to reduce the amount of information on the pages

10:18:14 And their website committee is requesting that

10:18:17 We reduce the years of meetings.

10:18:19 minute meetings and agendas to five years.

10:18:22 And all presentations will be presentations will be

10:18:26 Is that all presentations from prior meetings or just from those

10:18:29 within the five years. Yes. So what will be present will be the current year plus four previous years of agenda

10:18:37 meeting minutes and any presentations.

10:18:41 beyond that five-year mark going back, we would just have just the presentations

10:18:47 available, but they won't be affiliated with any previous year. They'll be just

10:18:51 be extra presentations or resources that the PSRC has had.

10:18:56 And it's just a way of doing a cleanup. And I'm pretty sure Nicola was going to say this part. If you ever want any previous before the five years.

10:19:06 of any of the meeting minutes, we still have them available from the LVA standpoint. They just won't be visually present on the PSRC.

10:19:15 website. So it'll be the current year plus the four previous years of agenda and minute meetings, but all presentations will still be present.

10:19:31 And I think that's a good idea from the standpoint of records.

10:19:34 Retention, not keeping them up there indefinitely.

10:19:38 They all have to go at some time and the library

10:19:41 I'm sure needs a space and doesn't want to take up space on their website. They have been very good at

10:19:48 facilitating that and they're offering us the space which is...

10:19:51 Very helpful.

10:19:55 Is there any um

10:19:58 discussion on

10:20:02 Does anybody object to that? Would anybody like to talk about

10:20:06 the website.

10:20:17 Okay.

10:20:18 So with no discussion, I would like to entertain a motion that we

10:20:30 Through the five years on the website and then the library has our previous presentations.

10:20:38 Would somebody like to?

10:20:41 Make the motion.

10:20:42 I'll make that decision.

10:20:46 Was it that me?

10:20:46 Five years? Yes.

10:20:50 Okay. And do we have

10:20:53 Second.

10:20:58 I'll second again.

10:21:00 Okay. Meade made the motion. Pam made the second that we are

10:21:05 going to limit our

10:21:07 agendas and minutes on the PSRC webpage.

10:21:11 that is hosted by the Library of Virginia.

10:21:14 to five years and then those other presentations will be available.

10:21:19 upon request.

10:21:23 Tina, did you have anything else you wanted to add about that or

10:21:29 Okay. All right. Thank you so much.

10:21:37 Rolling right along, we're going to go into our...

10:21:41 Professional connections networking session

10:21:45 So often when we're at these meetings, we have speakers and

10:21:50 vendors and things of that nature.

10:21:52 But I really wanted to take some time during this meeting for all of us to get to know one another better.

10:21:59 It's very helpful and has been helpful

10:22:02 to us and Prince William

10:22:05 go out through PSRC, through other records organizations

10:22:11 through visiting the different schools and our nearby school districts

10:22:16 and seeing how they operate. Every time we go somewhere or talk to somebody, you take away something.

10:22:22 It might be an idea you never thought of and you say, oh, that's cool. I can bring that back.

10:22:29 implement that.

10:22:30 in our district.

10:22:34 So the way we're going to set it up is that we're going to give everybody at least five minutes.

10:22:40 We want you to introduce yourself, tell us who you are.

10:22:44 your job title, your school division.

10:22:47 And then some of your roles and responsibilities.

10:22:51 Tell us a little bit about your school division itself, about where you're located, geography.

10:22:57 geographically in Virginia.

10:23:00 the number of students, number of schools, and then more about your records management.

10:23:06 program, the records management staffing and logistics

10:23:10 And how you really have how you really

10:23:13 how you implement it on a daily basis throughout your school division.

10:23:19 I think it would also be helpful to talk about some areas of success.

10:23:24 to include tips and tools of how you've

10:23:28 what has attributed to that success?

10:23:30 And then some areas of challenge or struggle.

10:23:33 And I think we probably have some similarities in that.

10:23:38 In that fashion. And then we'll give a chance at the end of the

10:23:43 your comments to ask

10:23:46 Or if there were any questions

10:23:48 Because somebody might say something that somebody wants to follow up after that.

10:23:53 So we will.

10:23:54 Ask for questions at the end of each person's

10:24:00 Time.

10:24:10 So I will go ahead and...

10:24:13 go first to kick it off.

10:24:15 And then we'll go through.

10:24:17 I guess we can figure, maybe we can go, I can call you in order that you're on the screen just so we make sure we hit everyone.

10:24:24 Again, this is completely voluntary. If you don't have this.

10:24:28 put together or you don't have it in your head to rattle off.

10:24:30 Just tell us who you are and what district you're from so we can document it in the minute notes for who is attending.

10:24:39 So my name is Nicholas Minor.

10:24:43 My title...

10:24:44 I'm with Prince William County Schools.

10:24:46 And my job title is Records Management Quality Assurance Specialist.

10:24:51 I hate that it's five words long. I always say it's a mouthful when I have to introduce myself.

10:24:59 So some of my roles and responsibilities are

10:25:03 training and direct support of school staff.

10:25:07 Mainly, we are working with the

10:25:10 school registrars for the majority of the time, but we also do

10:25:16 The confidential disposition, the shred and destruction

10:25:20 for the division as well.

10:25:23 With that, we have an onboarding program for our new school registrars.

10:25:28 And generally, it's a daily support that

10:25:32 I usually have...

10:25:35 you know maybe five to six contacts a day

10:25:39 Through email, communications, phone, things like that.

10:25:45 I do, I review and approve.

10:25:47 and schedule all of our incoming records to the records center.

10:25:51 We have a physical record center and we receive those inactive and

10:25:58 graduate records in our center one year after year

10:26:02 the school year.

10:26:04 We have a system in place of a report from our student information system.

10:26:10 We review that against what the school is sending us to make sure it lines up and we

10:26:16 have a lot of factors of checking in there before we bring the records into our building.

10:26:23 I also handle the reviewing and scheduling of the confidential disposition, act as the proving officer on all of our RM3 forms.

10:26:32 A little bit about Prince William County Schools. We are in the Northern Virginia area

10:26:38 Going up I-95, we are between Stafford and Fairfax.

10:26:43 We have approximately 100 schools and sites.

10:26:47 And about 91.

10:26:50 thousand students.

10:26:51 And when I was looking up the data, I did see that we are

10:26:56 The second largest school division in Virginia.

10:27:00 As I said before, we have a physical

10:27:03 building that's a record center.

10:27:05 And we have a team of seven people.

10:27:08 That's including one supervisor.

10:27:11 five specialists and one admin support.

10:27:15 And we are part of the information and instructional technology department.

10:27:21 We just transitioned there from a restructuring the 1st of July, but prior to that, we were a part of the

10:27:28 Accountability Department.

10:27:34 Okay.

10:27:36 Our...

10:27:38 As the record center, we are responsible for alumni records requests, so any students

10:27:44 after they withdraw from the district or graduate and those records have been transferred to our facility.

10:27:52 And we house all of the records for the short term for the five-year retention.

10:27:58 And then we're responsible for the long-term archiving for the 75-year retention.

10:28:04 And at that

10:28:06 after the five-year mark is when we are getting

10:28:09 rid of the paper and then digitizing for

10:28:12 the retention of 75 years.

10:28:16 I kind of mentioned before that we received the graduates and withdrawal records on an annual basis.

10:28:22 Usually we start receiving our graduate records. So for 202

10:28:26 Those are coming in to us. We start receiving those October 1 of the

10:28:31 same year that they graduated.

10:28:35 And the inactives were usually about one year behind on bringing the inactives in.

10:28:41 about the year after.



10:28:49 So some of our successes in our school division

10:28:54 have been...

10:28:56 our records management onboarding training program for new registrars

10:29:00 I think we've had a in the last

10:29:03 three to four years of pretty high turnover of about

10:29:08 one third of our registrars.

10:29:10 or new people each year. So we generally have to do two main sessions of onboarding.

10:29:16 And then we follow up with a school visit and do hands-on with each of the registrars individually just to make sure that they're up to speed

10:29:26 on everything records management, and they have the tools they need to do their job.

10:29:33 Another success is improved accountability and receiving of inactive and graduate records.

10:29:40 We kind of stepped up the reports that we have and how we receive them.

10:29:47 Prior to doing that, we were just kind of receiving them as the school decided to send them to us.

10:29:52 Graduates were more strict but inactives, we were a little lax on that. So we kind of mirrored the same

10:29:59 process we had for graduates.

10:30:01 transitioning it all to transitioning it all

10:30:05 data from the student information systems, Excel reports.

10:30:08 And then they submit Microsoft forms. So everything is tracked online.

10:30:13 And it took out a lot of the redundancies of

10:30:16 data entry, we'll have that data already there in the

10:30:21 Excel file.

10:30:23 Also, another channel of success is another

10:30:28 are partnering with and using Scribble's software for our records request.

10:30:35 It really has helped.

10:30:36 ease to the customer that everything is handled online, I would say probably 95% of our records requests, both at

10:30:44 the record center and our schools

10:30:47 our process through Scribble Software.

10:30:49 And that allows us to track how many requests. It allows us to see at a division level

10:30:57 all the requests that are going through the school and how they're being processed and the time it takes to

10:31:03 have them processed.

10:31:06 Some of our challenges have been that turnover in the registrar staffing is just hard to keep up.

10:31:12 you know for our team at the records center to make sure that everybody's trained

10:31:17 Because it's like you're just repeating over and over again.

10:31:21 So that's been a challenge, but we're trying to do the best with that that we can.

10:31:25 I think another challenge that we face is

10:31:29 the long-term retention, the 75 years for destruction

10:31:33 it's kind of, I think...

10:31:35 not necessarily an after site, but who's still here after nobody's still here after 75 years.

10:31:41 So we've got a good program in place for the five-year

10:31:44 And a good place to retain it for 75, but who's getting rid of it at the end of those 75 years and what does that look like?

10:31:54 Okay, and that's all I had.

10:31:57 Does anybody have any questions for me?

10:32:04 And if it's hard for me to follow the chat. So if you do have any, if you couldn't mind just unmuting your mic.

10:32:10 and speaking.

10:32:16 Okay.

10:32:18 So I don't have any. So we'll go on. And the first person I see here, and again, if you're not ready or

10:32:24 Or if you don't want to have...

10:32:26 all these comments. Just tell us who you are and where you're from. But if you want to

10:32:32 share, please feel free to do that. And we're going to start with Robert Scruggs, if you're ready.

10:32:38 Yes. Can you hear me?

10:32:41 Yes.

10:32:41 Okay. Hello, my name is, you can call me Robbie.

10:32:45 Robbie Scruggs with the Pennsylvania county

10:32:49 school division. I work in the finance department.

10:32:53 My title is Accounting Specialist.

10:32:57 I started working here in June of this year.

10:33:02 So been here about six months. My wife is a school teacher in the county. My parents, both my parents were

10:33:11 educators in the county for like almost 40 years. My wife's been a school teacher for 20.

10:33:16 My daughter goes to this in this school division, to Tunsville High School. She's a

10:33:21 Freshman this year.

10:33:24 We have 19 schools in our division.

10:33:28 pits and we have roughly 7,900 students.

10:33:34 Pennsylvania County is located on the border of Virginia almost.

10:33:40 We're only like 30 minutes from North Carolina. So I always tell people, if you know where Lynchburg is and you know where Danville is, we're kind of in between.

10:33:50 Right off of 29. It's where Chatham's located, where I work.

10:33:57 As far as my roles here, like I said, I just started in June, so I'm just trying to learn everything.

10:34:05 But I help with budgeting the different

10:34:09 things that we all the different accounts that we keep up with. I help with the budgeting process.

10:34:17 I helped...

10:34:18 Make sure everything's audited correctly because we have to turn in all the stuff through the auditors.

10:34:25 I do a little bit of everything.

10:34:28 I was just trying to, you know.

10:34:30 I am in opposition here but um here

10:34:32 I helped with the cash flow, making deposits.

10:34:37 balancing the revenue and the expenditures on a daily basis.

10:34:43 I just started in the records retention. Amy Hardy was the person that we had here.

10:34:50 But she turned everything over to me, I think, in mid-October.

10:34:55 So I'm basically new here and new to Rutgers retention.

10:35:00 And so I don't really have any pros or cons or success stories

10:35:07 Or whatever. But the thing that you had mentioned earlier, Nicholas, the turnover, turnover

10:35:14 I guess it's everywhere. People just don't stay in jobs very long.

10:35:21 And so that's a daily challenge for us finding teachers, keeping them.

10:35:28 You know, and people coming and going. You know, used to people would stay at a place for

10:35:35 Like I said, my parents were educators in this county for almost 40 years but

10:35:40 We hire a teacher now and they may stay a year or they may stay

10:37:12 scanning.

10:37:14 the index files

10:37:17 did not...

10:37:18 did not come back as anticipated. So we had to rebuild all the index files on over 700 boxes of records.

10:37:27 And Michelle Brittigan who's

10:37:31 in on this meeting too. She's going to come up a little bit later.

10:37:36 we were able to hire her right at the beginning of the

10:37:41 COVID when we were allowed to bring people back into the schools. And she has completely re-indexed all of her files we've

10:37:49 gotten a lot done there.

10:37:54 the...

10:37:55 I'm also the records officer for Albemarle county

10:38:00 schools and there's one other records officer that handles hr

10:38:06 records.

10:38:09 their processes.

10:38:13 Basically, we have an electronic system for our 75 year retention

10:38:19 are permanent. And that's how we do our 75-year deletions is we have them archived

10:38:27 by year so that we can delete the older files as they come due.

10:38:32 Michelle's got a

10:38:34 system set up in her office where the student records come from the schools

10:38:41 Sometimes organized, sometimes purged, but where they're not purged.

10:38:45 She separates all of the records out by destruction category, report cards, just documents

10:38:54 that don't need to be retained for the 75 year.

10:38:57 And then about every three months, we have a shredder come in and shred those boxes.

10:39:04 by category.

10:39:07 And we do have a process where either the schools are mostly here internally

10:39:16 Michelle.

10:39:18 puts together our

10:39:20 RM3 forms.

10:39:23 Generally speaking, we like to have somebody at the school do the middle level

10:39:28 sign off on those to make sure that there's no legal holds, make sure there's nothing that needs to be retained.

10:39:35 And then it comes to me for final sign-off as the records officer.

10:39:45 Let's see.

10:39:48 One success story that we've

10:39:50 Well, a couple of success stories.

10:39:53 One stands out was just implemented this year.

10:39:57 We have an annual event called Making Connections where everybody in the entire school division

10:40:03 comes together for

10:40:05 PD training. And we were able to do two sessions

10:40:11 This year, first time we've done this in a long time since before COVID.

10:40:16 and um

10:40:18 just want to...

10:40:20 Tashauna came in and helped us do a presentation on a

10:40:26 or in the GS21 schedules.

10:40:28 And both of us hit very heavily on the changes.

10:40:36 The 75 and the five or the five year and the seven year

10:40:39 retention schedules.

10:40:42 And we also hid heavily on the RM3 forms. There was a lot of new information for registrars who

10:40:48 That was most of the people in attendance.

10:40:52 But we made the sessions open to everybody in the county.

10:40:56 the school division.

10:41:00 So that's one of our better success stories. We've kind of set up

10:41:06 a system very similar to the psrc

10:41:09 where we are trying to get feedback from the registrars on how each individual school does their

10:41:16 individual school records management.

10:41:18 And what we set up, which is new this year, is when somebody comes up with something, hey, I want to know how to do something.

10:41:27 We actually are going to do surveys to all of the school registrars if it's something that is done and

10:41:34 and managed at the school level.

10:41:36 where there's not anything prescriptive

10:41:39 But we kind of get a consensus on the best way to do things that way.

10:41:44 And hopefully that's going to take us

10:41:47 for frequently asked questions, things like that into the future. But that's another success story that I think we can share.

10:41:54 Other than that, I think we're that

10:41:56 kind of covers us.

10:41:58 If there's any questions.

10:42:07 Thank you.

10:42:13 We're just working out the in-person mics.



10:42:16 I have a question for you for the PD training you mentioned that's

10:42:20 Just for registrars only or do you train principals or athletic director or anybody else on that?

10:42:26 Okay, so because it's making connections it was

10:42:31 focused on the registrars and also the school

10:42:36 office associates, secretaries.

10:42:38 office staff. And we did have some administrators sit in on these sessions too.

10:42:44 So it was division wide.

10:42:46 Anybody that wanted to attend these sessions was able to attend.

10:42:52 Okay, thanks.

10:43:00 Maid, you may have mentioned and I just missed it.

10:43:03 Did you mention how many schools?

10:43:05 And how many students?

10:43:05 Oh, I'm sorry. Yeah, let me. So our school division um

10:43:12 Let's see.

10:43:14 I don't mean to put you on the spot.

10:43:14 We've got, no, no, we're good. 15 elementary schools

10:43:19 five middle schools, three high schools

10:43:22 one community charter school

10:43:24 And we also have some academies.

10:43:29 that are...

10:43:31 Oh, let's see.

10:43:35 So here at Center One, we have an information and communication

10:43:40 learning center which basically is technology and people come from all the high schools to take

10:43:46 specialized courses here.

10:43:48 We have a center for learning and growth.

10:43:52 which is on our Lamb's Lane campus

10:43:57 But let's see, we have...

10:44:00 Okay, we have three academies. We have an environmental studies academy

10:44:06 We have a health and medical sciences academy, and we have a math and engineering science academy. And each academy is located

10:44:14 One at each one of our three high schools.

10:44:17 But you can take, some students are allowed to go between schools if they have an interest in

10:44:24 something going on at one of the specific academies.

10:44:31 As far as

10:44:32 Heritivation.

10:44:35 Let's see. Students, we have 13,835.

10:44:42 We have...

10:44:45 1,407 teachers.

10:44:48 We have 2,792 total employees

10:44:52 181 administrators and 1,204 classified staff.

10:44:59 And our school division is located right in the middle of Virginia surrounding the city of Charlottesville.

10:45:07 Thank you. Do you have any other questions for me before we move on to the next person?

10:45:15 Okay. Thank you, me. Appreciate that.

10:45:18 Just in case there's anybody that has a...

10:45:23 time issue today and you would like to speak sooner rather than later.

10:45:27 Just drop that in the chat and I will fit you in.

10:45:30 earlier than the order that I see you on the screen, because I know some people may have to leave or something like that.

10:45:37 So we're going to go to Tina.

10:45:41 Keener.

10:45:43 Hi, everybody. I'm Katina Keener. I work for Gloucester County Public Schools.

10:45:48 title here is Associate Director of Student Services.

10:45:51 I wear many hats. I'm the division's hearing officer. I'm the homeless liaison, home instruction and homebound services go through my office.

10:46:01 I also am the foster care liaison.

10:46:04 State reports go through my office and really the person that does the bulk of the work for those things is my student service specialist, Amy Heaton.

10:46:13 And she's on the call today, so you'll hear from her whenever it's her turn.

10:46:18 But Gloucester is part of the Middle Peninsula. We're right across the York River from Yorktown and Williamsburg

10:46:25 We have about 5,000 students. We have five elementary schools, two middle schools, and one high school.

10:46:33 um and

10:46:34 records just kind of falls under me. I've never really received any training, so I was excited to find this group.

10:46:43 I am the person who signs the destruction

10:46:48 paperwork and Amy works with our registrars in each of our buildings

10:46:55 We've been in our jobs. We started together here in the office for about three and a half years now and so

10:47:02 We're still working to tighten up things here. We had a lot to learn and so we are now beginning

10:47:10 to train our registrars in the summer a little bit.

10:47:15 So we're still working on those things.

10:47:18 But yes, this records is just kind of one of the things that falls under my title. So I don't really

10:47:26 necessarily get to spend a lot of

10:47:29 time learning about it. So we kind of learn on the fly, use the website as a resource and then

10:47:36 certainly try to attend these meetings so

10:47:39 We know what to do. All of the records are housed in each of the school buildings. So really trying to make sure that

10:47:46 principals and assistant principals understand

10:47:50 the importance of their records, what they should be keeping.

10:47:54 Our bookkeepers are trained by our

10:47:58 financial office and we just recently got a new cfo

10:48:01 and a new superintendent and new directors of instruction. So we've had a lot of changes in the last year. So just making sure that everybody understands

10:48:12 What they need to be doing, what they should be doing. We are still tightening up our process of

10:48:20 record destruction. Records used to be all sent here in the summer and that's just become

10:48:28 difficult to manage. And so Amy has done a great job of working with our buildings

10:48:35 to keep the records in their buildings. We've worked with technology to turn our copy machines into

10:48:43 You know, scanners that our registrars can start taking care of their own files in their buildings correctly instead of

10:48:51 shifting them around and having them moved over the summer by various people who are working.

10:48:57 And so we're really trying to tighten up our process

10:49:02 We do not keep really records electronically, but Amy's done a great job of

10:49:09 working to get our employment verifications and transcripts and things like that online now so she can talk about that when it's her turn.

10:49:20 So we're a work in progress and we appreciate this group.

10:49:29 Thank you so much, Katina. Do we have any questions?

10:49:32 Katrina before we...

10:49:34 Move on.

10:49:39 What I'm going to do now, since Amy Heaton and Katina work together, I'm going to

10:49:45 skip ahead and skip ahead.

10:49:48 Let Amy have the floor at this time.

10:49:52 Hi, my name is Amy Heaton. I think Katina pretty much covered most everything for our division.

10:50:00 I am curious to hear how other divisions are handling the new two-year extension on SPED records.

10:50:08 And in my thought process right now, we're looking to

10:50:14 You know, have our buildings scan in everything after the five

10:50:20 And then send the hard copies of the SPED records here now.

10:50:27 for us to house for an additional two.

10:50:30 And then after those two, we'll just destroy.

10:50:34 But just curious how other divisions are doing that.

10:50:42 Are your schools holding everything for the five years?

10:50:46 This time?

10:50:46 Yes, currently our schools hold everything for five. After five, they were scanning in the queue and then destroying

10:50:55 the paper copy, scanning in the 75 year record and destroying the paper copy. But now that we have to keep the SPED for an additional two

10:51:03 I'm thinking...

10:51:05 I don't want them to have to house all those records for seven years. So I'm thinking maybe to still scan in the 75.

10:51:14 after five and then us just house the SPED for an additional two

10:51:21 But again, just curious how other divisions are going to handle that.

10:51:30 Yeah, for us, I don't know that we're there yet because they're there yet because

10:51:36 It's starting with the...

10:51:38 the current school year, right? 24, 25 and seven years out from there

10:51:43 So I think there's been a lot of talk. The library is going to have a focus group

10:51:48 that's going to delve into that a little more.

10:51:53 And with VDOE's participation.

10:51:57 I don't know if anybody else has anything they want to add there or if

10:52:01 They've already come up with some solutions or they're thinking about it.

10:52:11 And we can also come back if we have time at the end for more discussion on any of these topics that

10:52:17 have been brought up throughout the day.

10:52:21 Then we're going to move on now.

10:52:24 Jeff Wick.

10:52:27 Jeff, make sure you got your mic over there.

10:52:32 Okay, I think I got it. Okay, good morning, everybody. I am Jeff Wick. I'm from Caroline County Schools.

10:52:41 Which is...

10:52:43 I like to say pretty much halfway between Richmond and Fredericksburg

10:52:47 So we're a little bit south of Prince William.

10:52:51 About 35, I don't know, 40, 45 minutes, I guess, from Richmond. We are a small county, very rural. We have five schools.

10:52:59 one high school, one middle school, three elementaries.

10:53:03 We also have an alternative school, but that has very few number of students in it, like 15 to 20 typically.

10:53:09 Our total enrollment's around 4,600.

10:53:12 Our staffing is about 700.

10:53:15 Or so, a little over 700

10:53:18 for staffing and similar to Gloucester, I do a lot of things, discipline hearings

10:53:23 attendance, safety, crisis plans, threat assessments

10:53:27 workers comp, nurses, couple committees I'm in charge of. It's a lot that goes on.

10:53:34 do a lot with the alternative school as well. Code of conduct, various things. So records is one of those.

10:53:41 And we really didn't have a records person until 2019 when I took this job.

10:53:47 It was kind of put on me to try to organize it and figure out how we're going to handle

10:53:53 the proper retention and or destruction of records so

10:53:58 Over the last five years, we've been working on it. I think we have a pretty good process in place. I haven't trained people in a couple of years. We haven't had as much turnover.

10:54:06 Our registrars have been the same for the last five years, so I've been lucky with that.

10:54:12 Bookkeepers, same way. Most of the secretaries. So I haven't had a lot of turnover in those

10:54:18 areas. School administrators is a different story

10:54:20 But they don't do most of it anyway. So the people I train have been around. So they know it pretty well.

10:54:26 And what I actually did is I went through all the GS forms

10:54:30 And I actually created Excel sheets based on position and

10:54:35 So I have a list of records that pertain to principals, to teachers, athletic directors, superintendents, assistant superintendents, you name the position.

10:54:43 maintenance and all that stuff. So each group gets

10:54:48 that list that they're responsible for. So it's easy for them to look at hopefully every year and say, here's my 13 records.

10:54:55 Or whatever it is.

10:54:57 Here's the years I have to keep them. Here's the number they can fill out the RM3 form.

10:55:02 based on that chart, send that to me and then I do all the approvals. I'm the only person who does it. So I approve what they send and I put it into the system and all that stuff.

10:55:11 And we shred once a year, usually in September. We collect over the summer.

10:55:17 The schools have their records.

10:55:19 the ones they're going to destroy, they put in a location, maintenance picks all those up for me. They bring them to a location.

10:55:26 And then I schedule the shred truck to do it. So we still have some work to do, I think, to improve our processes.

10:55:33 For example, we destroyed records this year from

10:55:38 I think it was the special ed department that dated back to 1990 or 1991 or something like that.

10:55:45 So they're well beyond their destruction date, but that's because we never had a person.

10:55:50 So schools were just storing records.

10:55:52 And keeping them forever. So we're still going through that process, finding things like that, but we've come a long way the last couple of years. So we should be pretty much caught up now.

10:56:00 and doing it the proper way. I think my biggest challenge



10:56:05 is electronic records. We don't make all our records electronic. We're still pretty much paper, but we do have some electronic records like threat assessments, for example.

10:56:15 So I probably need some guidance on how to get rid of those records at the end of their period. Do we just delete them from the computer?

10:56:22 Because I have threat assessments on my desktop.

10:56:27 Or whatever you call that, that drive, the G drive or whatever we call it. So how do we get rid of those things properly? So I probably just need some more

10:56:35 direction on electronic records. I think it pretty much covers everything I wanted to mention.

10:56:41 Thank you, Jeff. Do we have any questions for Jeff? I do see in the chat that everybody's asking about your chart and will you share the chart?

10:56:50 I would be happy to share the chart. I can't do it from here because I have a Chromebook.

10:56:54 And it's a Word file. I'm not a big Google Docs person.

10:56:57 And I get a lot of slack for that. But I like Excel. So when I get back to the

10:57:03 I can share that and everybody can take a look at it for sure.

10:57:08 Hey.

10:57:06 I do have one question for you. Do you feel

10:57:12 Like you have a good system among your departments. You said something about

10:57:15 You mentioned the number 13.

10:57:18 Yeah, it was kind of a random number. Yeah. Do you have a particular record liaison in each of your

10:57:26 areas or departments how did you go about

10:57:28 I do not. Pretty much everybody goes through me. If they have questions or if I need to

10:57:35 to help them with something, they come to me, send me emails or call me and I work them through the process so

10:57:40 The bookkeeper is responsible for her records.

10:57:43 the registrar is responsible, the athletic director, so on.

10:57:47 Thank you.

10:57:50 Does anybody else have any questions?

10:57:53 For Jeff, before we move on.

10:57:55 If you want to send that chart to Nicholas, we can or may we can include that with the meeting minutes.

10:58:04 Okay, that sounds great. I will definitely do that when I get back to the office.

10:58:10 might not be till tomorrow.

10:58:14 So we're...

10:58:16 Julie Taylor, she had mentioned the chat that she has to leave at 1130. So if Julie wanted to take her time now.

10:58:24 We'll go to Julie.

10:58:30 Okay, can you hear me?

10:58:32 We can, yes.

10:58:34 Okay, I'm fairly new to

10:58:38 this role, Julie Taylor, Galax City Public Schools.

10:58:42 I am a finance specialist.

10:58:46 I inherited the records management system from the lady who previously

10:58:51 did payroll. That is my new role.

10:58:55 We have three schools, one high, one middle, one elementary

10:59:01 There are 1,450 students in our division, so we are very small.

10:59:07 We are located in Southwest Virginia. I like to say if you

10:59:12 look at the shape of Virginia where it's where

10:59:16 angles down on the left and then

10:59:18 and goes back up towards

10:59:21 West Virginia go straight down next to the North Carolina line and you will find a galax.

10:59:28 This has been a challenge for me. There's a lot of things that you're mentioning that

10:59:33 I feel like I need to

10:59:37 maybe investigate a little more, but taking on the payroll

10:59:42 department has been a very big challenge and

10:59:45 Right now, just kind of making it day to day-to-day

10:59:49 So the chart that

10:59:52 was mentioned earlier by Jeff. Sounds like a great plan to me

10:59:57 to be able to start organizing

10:59:59 this particular aspect of my role. I've been with the division for 19 years, just in a different department so

11:00:07 This is all very new to me.

11:00:17 If we have any questions or anything we want to ask Julie.

11:00:24 Thank you, Julie. We appreciate that.

11:00:27 And I appreciate this group. It's been so informative and I'm looking forward to

11:00:33 digging into this a little more and more

11:00:36 really trying to

11:00:38 come up with a plan to organize it and administer it.

11:00:42 We're glad to have you and hopefully through our conversations today, it'll give you more, some people to reach out to directly if you have some questions or need some help.

11:00:52 That sounds great. Thanks so much.

11:00:54 Thank you. Okay, we're going to go to Pam Stewart from Loudoun County.

11:01:04 Hi there. My name is Pam Stewart.

11:01:07 I'm with Loudoun County Public Schools.

11:01:09 We're in Northern Virginia, bordering

11:01:13 Fairfax. We're to the west of Fairfax. And like Prince William, Nicholas, we have exactly the same number of schools.

11:01:21 100 schools, a little bit less enrollment. I think we're around 85.

11:01:26 thousand on our enrollment.

11:01:31 that is divided into 65 elementaries, 22 middles, and 17.

11:01:38 high schools, and I think we have somewhere over

11:01:41 13,000 employees. So we're very similar in size to Prince William County Schools.

11:01:48 My position is record supervisor, so that includes

11:01:53 records management, records management

11:01:55 the retention and destruction of all official documents.

11:01:59 throughout the division. So not only schools, but all the offices and departments as well.

11:02:05 And then our office also handles the archiving of the student's record. Our student records stay in the schools for five years currently, although we've got that whole five seven thing that we're

11:02:17 that we're all talking about this year with the special ed records so

11:02:22 They currently stay in the schools for five years and then come to our office for archiving.

11:02:28 We have a staff in our office of myself.

11:02:33 Plus three full-time staff members and one part-time so we're

11:02:38 we greatly need more staff. We're understaffed, probably like everyone is.

11:02:43 trying to get more in the budget, hopefully at least some part-time if we don't get some full time.

11:02:50 And we do all of our own when we're archiving the students records, you know, we're going through them too.

11:02:56 pull out the short-term retention items and then scan

11:03:00 We use Laserfish for scanning our long-term retention items.

11:03:04 And we do that ourselves. I know some school divisions send the scanning out.

11:03:10 But we do that in-house with our staff. So again, that's another reason why we do need

11:03:16 More staff.

11:03:18 And we also fill the records request for alumni that are gone more than five years gone from the division.

11:03:25 We use scrib order for that. Like I know a number of school divisions in

11:03:31 Virginia u scrib order. And then just as of this summer, this new school year, we started using Scribd transfer

11:03:39 Which is for transferring current student records to other divisions for the purposes of enrollment. And that's been working out well for us.

11:03:48 So far...

11:03:51 And...

11:03:54 We're all all kind of waiting to see how our focus group

11:03:59 And what plays out for

11:04:03 the special ed records to inform how we

11:04:06 are going to come up with a new process for that. I think that will be

11:04:11 very challenging with the large number of schools we have that are all, I mean, the one common thread seems to be that

11:04:19 the vault in every school is too small, so to house those records in the schools for that period of time is going to be a challenge and then

11:04:28 our vault storage space that we have is also where

11:04:32 We don't have any extra space. So it's going to be a challenge.

11:04:35 All around, I think. And something that we're all facing.

11:04:42 And I think that's the

11:04:45 the down and dirty. Does anyone have any questions?

11:04:55 If not...

11:04:56 Thank you, Pam.

11:05:01 And we appreciate all of your work with PSRC.

11:05:06 We're going to.

11:05:06 You got really quiet, Nicholas. I don't know if something happened to your audio.

11:05:11 Can you hear me okay?

11:05:14 It's quiet for me. I don't know about everybody else.

11:05:20 Testing, one, two. Can you hear me?

11:05:22 That's a little better.

11:05:23 Okay, I guess I just lean into the mic a little more.

11:05:27 We're moving to

11:05:30 Alexandria.

11:05:39 Alexander, we can't hear you.

11:05:59 Would you like me to go to the next person and we'd come back to you?

11:06:03 Okay, sure. Okay, so we're moving on to Julia Green.

11:06:08 I'll circle back.

11:06:13 Hello, everyone. I am from Charlottesville City Schools. So we border with Albemarle county but we are

11:06:23 very smaller. So we have um

11:06:27 Well, first of all, an executive assistant to the chief operations officer. I also am a deputy clerk to the school board

11:06:37 So basically I have wear a lot of hats with operations.

11:06:43 So anything that's under

11:06:46 our chief operations officer. So we have safety and security. So sometimes I could get pulled in helping out with what we call now our care and safety assistance which are

11:06:59 We placed our SROs because we don't have SROs in the building.

11:07:04 I could be doing a crossing guard on the crossing

11:07:08 street. And plus I work really closely with transportation

11:07:13 So those are my biggest hats there.

11:07:18 And so we have roughly about 4,500 students. We have nine schools and one alternative school that has grown over the last couple of years.

11:07:33 went from approximately 20 students and we doubled it to 40 which um

11:07:39 We do like a night school because our building is very small.

11:07:43 So with us, we are trying to get ourselves together with records management.

11:07:52 So we are working right now with Scribbles trying to figure out how we'll move forward with that.

11:07:59 And also we are working

11:08:02 to get our files digitized. So in trying to figure out exactly how that will work.

11:08:09 Of course, we'll be sending it off to get it done.

11:08:15 But we're excited about this new process, but it's going to be a lot of work going forward. So the next year or two is going to be like

11:08:26 Fire.

11:08:39 Does anyone have any questions for Julia?

11:08:46 Julie, could you repeat your division one more time?

11:08:51 Yep, it's Charlottesville City Schools. So we're right here with Albemarle County, but of course we're the city with the EVA.

11:09:10 Changed my view and now I don't know who's next. Give me just a moment.

11:09:24 Alexander, do you want me to come back to you now or

11:09:27 You want to...

11:09:27 Can you hear me now?

11:09:30 We can hear you. It's a little low, but we can hear you.

11:09:35 I don't know.

11:09:36 I don't know if I'll be able to get much louder.

11:09:39 That's much better, yes.

11:09:39 Oh, okay. Awesome. So I'm Alexandria Ferguson. I'm an archivist for the city of Virginia Beach Records Management Program, which is technically outside of the school system.

11:09:50 And then with me, I have Lois Ridger. I'm a record specialist for the City of Virginia Beach also.

11:09:56 Yes. So I think Laura Beth, who is with Virginia Beach City Schools.

11:10:00 was on earlier, but I don't see her name anymore. So the City of Virginia Beach Public Schools has about 86

11:10:09 schools and then a couple of specialty centers. And we serve about 65,000 students.

11:10:16 across the city. We recently this past summer actually did an audit survey type situation

11:10:24 with schools where Laura Beth, as well as members of our staff visited almost every single school site over the summer to talk with their bookkeepers and talk with their registrars.

11:10:35 about their record situations and what we can do to



11:10:40 help with training and onboarding because akin to many other school systems, turnover can be a problem with registrars in particular

11:10:49 And we're looking to address kind of training gaps and better supporting staff as they come in as well as

11:10:56 After they've been established after a handful of years.

11:11:02 Is there anything you think you would add? Just the fact that we have the boxes. Yes, we do house the boxes. We have three on-site record centers and most of our school records

11:11:11 end up in two of them.

11:11:15 For the most part, most of our schools, depending on their size, because not all of our schools have true vaults for their records.

11:11:21 Depending on their size, they'll retain three to five years worth of

11:11:26 records before they transfer them to our record centers and then we'll help facilitate destruction when that comes available.

11:11:33 At this time, we don't really do any digitizing of records. There's laserfiche and part of our audit survey.

11:11:39 was trying to figure out where these duplicates are existing and

11:11:44 how they're being addressed, because if we destroy a short-term box

11:11:48 But some things on laserfiche somewhere else, do we have confirmation that it's been

11:11:53 destroyed as well. So trying to find those

11:11:56 kind of drops in the process is something that we're actively working on.

11:12:02 And I think that's all I have for right now.

11:12:05 Unless we're good. So that's us.

11:12:08 Okay, thank you.

11:12:11 Before I open it to questions, I have two. So I'm going to ask first and then hope I'm not butting in line.

11:12:19 Can you tell us a little bit about the partnership with the city government

11:12:24 and the school division and how if you know how that came about and why it exists.

11:12:30 That's going to go back to some history and Alexander here has been with us for almost two years now and

11:12:38 One year. Yeah, one year. Seems like it's longer. Yeah, that's good. Yeah, she's been with us about a year and um

11:12:46 The history was when the records management program went into effect

11:12:52 we started servicing all of the departments within the city, which included the schools.

11:12:58 We also do the courts.

11:13:00 Commonwealth attorney. So that is just how the program was set up so that it would encompass all the agencies, the schools, and hopefully Laura Beth is still on here somewhere.

11:13:12 The schools do not have a records person per se.

11:13:18 so um

11:13:20 Our manager serves as the approving official for all RM3s for city and schools.

11:13:28 And you said you house some of the records. Is any of that student records that you're housing or more like internal departments and

11:13:37 It's a mixture, but the majority I would say would be those 75 year long-term cumulative files.

11:13:44 As well as school board council, all of those administrative ones when they get sent to us.

11:13:50 Which was another reason why we did the audit survey was so that we could start tracking down and having more of a comprehensive understanding of what records are where and which departments within schools

11:14:01 are holding on to their records and not utilizing our services.

11:14:06 For the most part, we don't take a lot of the bookkeeping and financing finance records because they're

11:14:12 their destruction and retention is so much shorter. They can typically

11:14:17 manage that themselves in-house.

11:14:20 But some of our schools are very small and some of them are very large and they may not have the space to even keep their short-term records

11:14:28 within their site for even a minimum of five years.

11:14:34 So we were actually very, I'm very interested in Nicholas. I'm going to reach out to you later because I

11:14:39 I'm very interested in the fact that your position exists because I think that's something that Virginia Beach schools

11:14:44 We're a little bit smaller than you guys, but I think that could be really powerful for Virginia Beach schools to have.

11:14:53 I think it's unique. I don't

11:14:55 Correct me if I'm wrong, and I don't know if any of the other divisions

11:14:59 that their local government, whether it's city or county

11:15:03 would be partnering and being involved with the school district as you all are because I don't

11:15:09 I don't know if you all are the only ones that do that. Do you have any idea or have you talked to any other

11:15:15 county governments or city governments that

11:15:18 are more involved with the school district.

11:15:21 No, I don't think so. I think there's a few

11:15:25 Our boss, Cynthia Hart, our records manager for the city

11:15:29 She might know of a few outside of the state that were

11:15:33 considering trying to reach out to and maybe visiting.

11:15:35 Just so we can learn more. She's not new to the city or to city libraries because we're actually housed underneath public libraries.

11:15:46 But she's new to the department.

11:15:48 of records management just a couple of months before I joined in. So we're starting to reach out to try and see who else can we meet.

11:15:56 And learn from as far as how they're managing their records.

11:16:03 I look forward to hearing from you.

11:16:05 Yes.

11:16:06 Does anybody else have any questions for Alexandria before we move forward?

11:16:14 All righty. Thank you all so much.

11:16:19 Next, we're going to go to Shannon Berna.

11:16:27 Can you hear me?

11:16:29 We can.

11:16:30 Okay, so my name is Shannon Burna. I have a few job titles. I'm a network account manager here for

11:16:38 City Public Schools. I'm also an alumni academic records manager

11:16:43 So Clarksburg City Public Schools is we're kind of nestled

11:16:47 And between Spasania County, Stafford County, King George, and Caroline, we're

11:16:52 It's only 10 square miles.

11:16:54 So we have a little less than 4,000 students. We have five schools, but we also have one being built.

11:17:01 Our staff is of roughly about 800 staff members.

11:17:07 So I also do lots of other things here. So, I mean, I do the network accounts and the security.

11:17:13 I do security training and I set up phishing alerts and phishing

11:17:18 I also am certified in PowerSchool in several

11:17:23 fields there, but mostly for security. And I'm also tier one help desk

11:17:27 for the division.

11:17:31 So unfortunately, Rutgers doesn't hold a lot of my time.

11:17:36 But I do convert all the short term records into long term

11:17:41 So that's about 700 files a year. And I do it by myself

11:17:47 Before I took that over, we used to have

11:17:51 a hodgepodge of people who would do that.

11:17:54 And from my understanding.

11:17:56 it kind of create a little bit of chaos. So this is like having one person with their hand in the pot is much

11:18:02 cleaner, more streamlined.

11:18:05 way of doing it.

11:18:07 I also, this is the this year in August is the first year

11:18:11 I've been doing records, the alumni records for about six years and this is the first year

11:18:17 that they have ordered a shredding truck and we shredded. So we cleaned out. We have a building across the street from us.

11:18:23 And we really do clean house.

11:18:27 We found records from my oldest that I found was 1989, big boxes of short

11:18:33 term records. We have been using laser fish a long time ago before I stepped in, they did use laserfish.

11:18:42 But now our system is pretty good. So the high school keeps the house the records at their school.

11:18:49 for an entire year. And then I get, well, actually to go across the street from us once a year

11:18:54 And then I'll order the records and then they'll come in in boxes and I will work through

11:19:00 this 700 files and it takes about half a year to do about six months. Like I said, I can't do it

11:19:05 all the time. And then we send them out to standing we use um

11:19:11 We use paper vision, silo images is the name of the company that does our scanning

11:19:18 So we have it electronically. We do ask for the short term i mean

11:19:22 the long-term records back so that way we do have a hard copy

11:19:26 Comes in handy every once in a while some

11:19:29 you know, before I took over, I noticed that sometimes files are missing electronically

11:19:35 But we're able to find them in the

11:19:38 the long term you know the the real skinny files that I sent out that were sent out at one point

11:19:43 So it comes in handy.

11:19:47 Our success is before I took over

11:19:51 the record.

11:19:53 people would have to either email, fax, or they would come in person

11:19:58 to get to request records to be sent to them.

11:20:01 And we did a lot of snail mailing like a lot

11:20:05 I took over and we started using parchment.

11:20:08 In parchment, you are allowed to upload

11:20:11 so many like I've got from 2010

11:20:13 all the way to current of kids uploaded into parts. I could go back further

11:20:19 But now I just don't have the time to get back much further than that.

11:20:24 And also our power school system, we switched over at some point. So it's going to be harder to get those. But anyways, so we use

11:20:33 We use...

11:20:35 parchment.

11:20:43 And now that I've taken over the last six years.

11:20:46 It is so much more accessible to our alumni

11:20:48 So in the past, they would do roughly 100, 100 transcripts per year.

11:20:54 We do like over a thousand now and that's just me. I'm the only one who gets the transcripts that come in for alumni.

11:21:02 So I think we've also had it put on our website

11:21:06 So it's much more transparent, much more easier for the kids to access.

11:21:11 We do have a

11:21:13 person stationed at the high school

11:21:15 And I talk to her quite often so that way she can, she's there to help the kids get on path for graduation and what they're going to do.

11:21:22 afterwards and i make sure she knows and the kids know how to get into parchment. They can go ahead and order it before.

11:21:29 we even

11:21:30 go ahead and have parchment repay.

11:21:33 for parchment yearly to

11:21:36 not charge a fee for our students for alumni.

11:21:40 We are kind of a socially economic disadvantaged

11:21:44 area, yes and no. But we try to do some things like that for our students. So that way if they need to request their transcript

11:21:53 we don't charge. The only people we charge is our third party companies

11:21:57 And we have gone through parchment and made sure that charge does not go

11:22:01 down to the student but stays you know that charge stays within that company

11:22:07 And I think that's everything. I tried to make little notes as we went. So if I forgot something, let me know.

11:22:17 Okay, do we have any questions for Shannon?

11:22:27 Just a second. We have Patty Massengill. She said she wasn't able to speak due to some dental surgery.

11:22:35 I just wanted to recognize that she did list her information in the chat.

11:22:43 from Denwindi County Public Schools. So if you all want to take a look at that.

11:22:48 Please feel free to do so.

11:22:49 But I just wanted to recognize her.

11:22:53 The next person we have is sarah

11:22:57 And Sarah, you can do your last name because I don't want to mess it up.

11:23:07 Are you talking to me?

11:23:07 Yes, sir. Go ahead.

11:23:09 Okay, I am Sarah Moran, and I am from the Culpepper County Public School.

11:23:16 division, my counterpart bliss cruise is also on this call

11:23:22 And I am...

11:23:24 the assistant to the superintendent, the deputy clerk of the school board, and the FOIA officer

11:23:30 We do have about 8,300 students, 12 schools

11:23:35 And about 1,400 staff.

11:23:39 And that's about it.

11:23:43 Okay, thank you so much.

11:23:49 We're moving on to bliss.

11:24:00 If you're not there or not ready, we can come back to you.

11:24:04 We would at least, if you don't want to speak.

11:24:08 Let us know in the chat your name and what school division you're from.



11:24:12 Okay, next we have Angela Flowers.

11:24:31 Angela, we can't hear you.

11:24:34 We can see you, but we can't hear you.

11:24:40 gifted and talented eligibility meetings.

11:24:44 Yeah, we can hear you now.

11:24:46 I am. Can you all hear me okay?

11:24:49 Yes.

11:24:50 Okay. I am with poor smooth public schools and I serve as the Director of Student Support Services.

11:24:59 So I wear many hats.

11:25:02 homebound, homeless education, home school, foster care liaison

11:25:08 attendance and truancy, enrollment

11:25:14 Community partners.

11:25:15 You name it, I feel like I get it. I get it.

11:25:21 And we just recently inherited records about a month and a half ago, maybe two months ago.

11:25:28 My counterpart, Mrs. Albagata Pugh is

11:25:34 In the meeting with me. So right now

11:25:37 When we inherited this

11:25:41 duty. We thought that it was only us

11:25:47 managing

11:25:48 Just student records.

11:25:50 And we found out that it's a little more involved than that.

11:25:56 So we recently met with Ms. Threat and she did the initial training and we are in the process of

11:26:04 Identifying people from each one of our departments to serve as a coordinator within their department to manage their records.

11:26:13 I do know that our IT department chief

11:26:17 has met with her.

11:26:20 But we've had so much turnover in our division, so many new

11:26:27 leaders. So three of our chiefs are relatively new

11:26:32 I myself am new and my role as well.

11:26:36 So we have work to do. That's pretty much where I am. I've heard a lot of good things and

11:26:45 This group, and I'm hoping that between you all and

11:26:49 Miss T that I will...

11:26:51 be able to work with my partner to figure out what we can do in Portsmouth to at least put something together. I do know that

11:27:00 Our director of school counseling used to have student records, but she said that she did not know it was as involved as we told her it was.

11:27:09 And last year's was, I think she said the first time she even had the opportunity to go in and audit any

11:27:18 records, but they didn't even get through that full process.

11:27:24 So happy to be here.

11:27:28 Okay, thank you. Did you say you had a colleague that was in the meeting, in this meeting or in the meeting that you were coming out of? I don't want to call them.

11:27:35 No, in this meeting right now, Mrs. Benita

11:27:39 Albergatti pew.

11:27:42 Okay, we can call on her next.

11:27:47 Awesome.

11:27:44 Since I didn't know when you say meeting, I know you were coming out of a meeting. So I didn't want to call on her if...

11:27:50 Yes.

11:27:51 She was in that meeting. I do have one question for you.

11:27:55 Yes.

11:27:54 How is it going with identifying a records liaison in your departments?

11:28:00 Where are you at in that process and do you have trouble

11:28:04 getting someone to take on that role or stepping into that role.

11:28:08 So I don't anticipate a lot of problems, but we just hired an HR chief. So getting someone from HR, I'm getting her to know who is best in her department.

11:28:22 I think that's going to be our biggest holdup

11:28:26 finance officer, I mean, finance chief. I've spoken with him. He has a couple of people identified

11:28:34 And then in the schools, because I am enrollment and registrars.

11:28:40 I'm just making sure that our administrators and those registrars are trained

11:28:47 I think we'll be okay. Transportation.

11:28:51 They have someone, but...

11:28:54 I don't believe anybody is really trained.

11:28:57 I guess that's the best way to say it.

11:29:01 Thank you.

11:29:04 What we're going to do now is just so everyone's aware, we do have a break coming up, but since we're in the

11:29:10 same school division, we're going to go to Mrs. Albergatti

11:29:15 And then we would take a break. Following the break, we have about

11:29:20 five people left on the call that haven't spoken.

11:29:24 That would be Carolyn.

11:29:25 from Fairfax County. We have Jennifer Test. There's Michelle.

11:29:31 Pam Arrington and Tracy Beaver.

11:29:33 So following the break, you five will have the opportunity to speak and share information.

11:29:40 about yourself and your school division.

11:29:44 You had the floor, Mrs. Albagattier.

11:29:47 Thank you. My name is Benita Abergatti Pugh. I am an executive associate for the Office of Student Support Services.

11:29:56 I have been in the district for quite a while.

11:30:00 almost 28 on the books and 11 off the books.

11:30:04 I do a multitude of things, whatever needs to be done

11:30:08 I could have done whatever doctor.

11:30:11 flowers needs me to support her where I will. We do homebound homeschool

11:30:17 Sherwood Scholarship attendance

11:30:21 Tracy.

11:30:24 foster care, it's a multitude of things, but that's all I have to say.

11:30:27 And I'm glad to be here.

11:30:31 Thank you so much.

11:30:32 Do we have any other questions for...

11:30:35 Forsmith, correct?

11:30:39 Okay. Any questions for Portsmouth before we um

11:30:43 Take our break.

11:30:46 Okay, thank you so much.

11:30:48 So we're going to take about a 15 minute break.

11:30:51 And we will resume at 1145.

11:46:12 Okay. I wanted to circle back to Bliss Cruz if you wanted to speak. I know you

11:46:18 Left some information in the chat. Did you want

11:46:21 Did you want to...

11:46:24 Share.

11:46:27 Hi.

11:46:29 I'm Bliss Cruz. I'm the Student Services Department Coordinator for Culpeper County Public Schools.

11:46:36 If you know where Fredericksburg is, then we're

11:46:39 Not too far from there, about 45 minutes.

11:46:44 So we have.

11:46:47 for secondary schools, two high schools, two middle schools, six elementary schools, one technical school, and one alternative ed

11:46:55 I maintain records and such for all 10.

11:46:59 And including the McKinney-Vento records, as well as updating and maintaining policy

11:47:05 safety and transcripts and diplomas etc for

11:47:11 the rest of the division.

11:47:22 Liz, I have a question. Do you...

11:47:25 how's the individual student records or do they come to you at a certain point? How does that

11:47:31 How does that work?

11:47:31 So our schools maintain them up to five years. We are working on trying to figure out the seven year stretch now.

11:47:38 However, a lot of our buildings are older and lack adequate storage space

11:47:43 um so

11:47:45 we are looking for every nook and cranny that we can store boxes and documents in.

11:47:52 Beyond that, we do have a storage facility that is a warehouse in our division.

11:47:58 Some of our records have been digitized over the past 10 years plus.

11:48:03 However, they were not done very well. So we are going back through gradually and trying to get them digitized.

11:48:11 I do not maintain anything at central office outside of our disciplinary safety and policy records.

11:48:18 Anything beyond that goes to the warehouse to storage properly labeled and

11:48:23 kept within filing cabinets and or file boxes.

11:48:29 How do you handle the retrieval when you have alumni records requests?

11:48:35 begrudgingly. I'm just kidding. If anything is beyond, so because we have so many that are digitized, it's fairly simple. I can search our Google Drive with the last name

11:48:49 of the request and pull it up. A lot of times

11:48:55 should, you know.

11:48:55 Obviously, we have multiple last names that have

11:48:59 hundreds of students under that. So once we get that narrowed down to the last name, I can scroll through and figure out the first name. Those are alphabetized by first name after they've been done.

11:49:11 My last name. Again, this wasn't all done very well. So sometimes there's information that's been cut off and then I will physically have to go down to the archives or to the records room and pull

11:49:23 the hard copy record.

11:49:27 And then do you have the in your warehouse, is that the whole

11:49:31 for the 75 years there in the warehouse?

11:49:33 Yes, sir.

11:49:35 Okay.

11:49:41 Hold on.

11:49:44 digitizing thing. I do have a question about the digitizing so

11:49:48 You mentioned you digitized the records and then you have a hard copy. So when you we don't digitize anything yet. So when you digitize, you maintain the hard copy forever or does

11:49:58 it sounds like, or does the digital version replace the hard copy?

11:50:02 We maintain the hard copy for the 75 years.

11:50:07 But the digital record just gives us an easier access to it and it gives us a more efficient way of being able to reply back to the records or transcript requests.

11:50:16 We maintain what we call, and I don't know if it's the same term for across the state or not, we maintain what we call a cover sheet.

11:50:23 that's got the birth date, first, last name first

11:50:26 Sometimes it has the most recent

11:50:29 address from when the student was in school listed on it.

11:50:32 no guarantee and

11:50:34 not everything was maintained or retained as properly as it should have been between

11:50:40 Are division boundaries changing and zoning changes, students coming in, withdrawing, that kind of thing

11:50:47 But that and then the transcripts are stapled together

11:50:51 And that is what we maintain. If there's anything beyond that, if there's a disciplinary record, a special education record.

11:50:58 any sort of special medical record, those are maintained in a separate

11:51:02 area of our warehouse and labeled as such.

11:51:07 But the rest of it, if they have writing samples or if they have um

11:51:12 Sometimes they'll have permission slips from field trips from 1924 or things like that.

11:51:18 Those all get shredded and documented that they've been shredded.

11:51:23 But what has been digitized is mainly the cover sheet and the transcript.

11:51:28 Okay, gotcha. Thanks.

11:51:30 Mm-hmm.

11:51:34 Hey, this is T. I'm going to piggyback up on

11:51:36 when it comes to digitizing. So from the library Virginia point of view

11:51:42 When you digitize

11:51:43 you now have a digital format and you didn't have a physical format.

11:51:48 In that instance, you identify which one is the actual record because it's only one true record and everything else is just a copy.

11:51:56 With that being said, we let

11:51:59 localities, agencies decide how long they want to keep.

11:52:04 those snail physical copies. And just like Bliss said, they digitized before and they saw some errors. So they were able to go back to their printed

11:52:13 copies to correct their errors and also have that as a backup. You get to make that discretion.

11:52:20 So I advocate, you know, have an amount of time that you're going to keep anything that has been physical that's now digital so you can have a backup plan.

11:52:29 But from the library point of view, you get to choose how long you want to keep those

11:52:34 physical backup copies for reference purposes for your own sake.

11:52:38 So yeah, it's only one official record and everything is just a copy and you at your locality can choose how long you're

11:52:45 choosing to keep those. And thank you, Bliss, for letting us know, like, hey, a lot of um

11:52:51 localities are having the issue of like, we digitize what we're seeing that everything didn't get digitized correctly. So you're able to go back and

11:53:00 make corrections and just have a backup plan.

11:53:05 Yeah, not a problem.



11:53:07 Thanks for having us on. And I'm sorry I missed my opportunity earlier. I had a parent phone call that I had to take.

11:53:15 That's okay. We're circling back.

11:53:18 Thank you for sharing. We appreciate you.

11:53:21 Telling us a little bit about yourself and your school district.

11:53:25 Okay, next we're going to go to carolyn.

11:53:28 from Fairfax County.

11:53:40 Hi, my name is Caroline Carrawa.

11:53:43 And I'm with Fairfax County Public School. My title is record management specialist

11:53:49 And I've been with Fairfax for about two years now.

11:53:55 my responsibility is from training the registrar

11:54:00 school registrars and handling all personnel record from hr

11:54:06 And I also review and approve all incoming short-term and long-term record for storage in our record center.

11:54:15 Our office and the whole student records

11:54:20 We have about

11:54:22 six full-time employee and we have about seven hourly employees who handle the student record from

11:54:30 Processing, scanning and

11:54:34 indexing of the student record

11:54:36 We use paper vision for record depository and we use Paper Vision Capture for scanning of our records.

11:54:47 What else can I talk about?

11:54:50 I'm also responsible for record destruction

11:54:56 I understood the record destruction from the schools and offices.

11:55:00 And we also have a lot of challenges with turnover for registrar and concert training and retraining of the schools.

11:55:09 We use script order for alumni request, which is done online.

11:55:15 And we have about 198 schools and 11 centers.

11:55:22 And about 180 students.

11:55:27 Thank you.

11:55:30 Thank you, Carolyn. Does anybody have any questions?

11:55:39 Thank you.

11:55:42 Next, we have Michelle.

11:55:46 Hi, my name is Michelle Burdigan. I'm the student records analyst with Albemarle county schools

11:55:52 In Charlottesville. I work with Meade Harris, who introduced our school division at the beginning

11:55:58 of this. So I'm not going to go into, you know.

11:56:01 all the school information since that's already been covered. But I just wanted to introduce myself and then my main

11:56:09 responsibility with Albemarle County Schools is

11:56:12 digitizing and destruction of the student paper records.

11:56:17 That's pretty much what I do day in, day out. Also with providing

11:56:21 student information to the school registrars as they request information that we've already digitized.

11:56:32 When I used to go to this team

11:56:36 I figured I was going early.

11:56:39 So you wa                      ? e                      1                      u                      5n                      6  
B

11:56:55 I had a question and it went...

11:56:59 Michelle, can you talk a little bit about

11:57:03 You had mentioned that the requests come in and then do the requests come to you and then you filter the request to the schools or

11:57:08 I'm surprised we're going to...

11:57:08 The school's handling all alumni records requests and you're

11:57:12 Yeah, all the requests come through the registrars and then they request it

11:57:17 through me and then I go back through them.

11:57:23 And are you using a type of program? How do those requests come in to you?

11:57:29 How do they make those requests?

11:57:31 No, no. If it's something they don't have already in PowerSchool, so they're looking there first and then

11:57:37 the information that we have digitized, I just go through our system and look them up and then

11:57:43 Currently, we're emailing back and forth through the registrar, but we're hoping to change that soon.

11:57:51 That's good.

11:57:50 Okay. So the former student would go back

11:57:53 to the school registrar of where they attended.

11:57:55 Correct. Correct.

11:58:04 Next, we're going to go to

11:58:06 Cam Arrington.

11:58:11 Good morning.

11:58:13 My name is Cam and I'm the registrar for Fredericksburg City Schools.

11:58:18 So I handle all of the registrations for incoming students for K through 12 for our division.

11:58:25 You met Shannon Berna earlier and she's the one that handles all the records.

11:58:30 I don't keep anything with me. Once I complete registration and the student is placed in power school.

11:58:37 I send over their file to send over to

11:58:40 to the school. And the school's the one that collects the records from the previous placement.

11:58:45 And so they also work with withdrawing the student and getting records. And then Shannon

11:58:50 does like the alumni records and the transcript

11:59:01 Cam, can you tell us a little more about that process? You say you do the actual registrations.

11:59:06 Yep. So when a family moves to our division

11:59:10 They come and see me. I do all, like I said, for kindergarten through 12th grade

11:59:15 And I make sure we have everything, birth certificate parent id

11:59:19 proof of residency, any physicals and immunization that we need. They're coming from out of the country.

11:59:27 the documents that they would need for us. And then I place the student in power school

11:59:32 And then send the file to the school

11:59:36 they'll get the records from the previous placement and work with placing the student in class.

11:59:45 And then you forward any

11:59:48 records that you create onto the school and they store them while the student is active and they're

11:59:53 particular school.

11:59:54 Yeah, if I get any records, like I said, I usually don't. Sometimes the parents will provide

11:59:59 IEPs, 504 plans, anything like that. And I put it in the folder

12:00:04 with all the student information and it's sent to the building. So I'm housed at central office.

12:00:12 Are you still completely

12:00:13 paper for registration or are you paperless?

12:00:16 So it depends on which day. So right now we are paper, but we are getting ready

12:00:23 to open up a new elementary school in Fredericksburg. We currently have two elementary schools, one middle and one high school.

12:00:30 Next school year, we'll have three elementary schools.

12:00:33 So because we're still trying to tweak out the zoning and the

12:00:38 how it's going to work with school placement and which school they're zoned for. We're trying to get numbers.

12:00:45 So normally I start registration for the next school year in April of this April.

12:00:51 This year, they want me to start it in January. So right now our online registration is down while we get all that ready to go.

12:01:00 For our kindergarten kickoff that's happening a lot earlier this year.

12:01:07 So you do do online registration.

12:01:10 And then...

12:01:11 Yeah, so we do both. We do both. We have paper yes

12:01:16 And then how does that translate from the registration piece to

12:01:21 the physical record. Is there a paper file or is it

12:01:26 Is it digitized?

12:01:27 Right now there is a paper file.

12:01:29 Okay. All right. Thank you.

12:01:31 Mm-hmm.

12:01:32 Any other questions for Cam?

12:01:37 Next, we have Tracy Beaver.

12:01:45 Hi, I jumped on a little late, but I am in the same school division as Nicholas, so I'll

12:01:51 skip through skip through

12:01:53 talking about our school division

12:01:55 I wanted to talk about one of the projects that our department is undergoing this year in working with our

12:02:03 Department of Information and Instructional Technology we are

12:02:08 Doing a project to categorize records to determine how we're going to maintain our electronic records.

12:02:16 Right now, we're kind of in a keep everything mode, which we all know isn't the right thing to do.

12:02:23 So we are looking at different software solutions that can maybe do some of the analysis for

12:02:31 tag records.

12:02:32 depending on if it's confidential or if it's public or if it's an internal record.

12:02:38 And we're focusing right now on our email

12:02:43 system and also our Office 365 system where people are storing records and

12:02:49 It's kind of a situation right now where things are just stored all over the place.

12:02:54 So we have a data governance project this year to try to rein some of that in and we're starting small.

12:03:00 We're starting with our student information system, our Microsoft Outlook.

12:03:05 And we're most likely going to start with former employees who are no longer here.

12:03:10 I think as you all may know, the tricky thing about email is it's not necessarily

12:03:17 all the same retention. It can depend on the content. And that's definitely one of the biggest struggles

12:03:23 that we're having this year.

12:03:26 My office assists with responding to FERPA requests when it's the entire record.

12:03:32 And we also deal with any FERPA disclosure notifications that need to go out.

12:03:38 And we deal with a lot of requests for records through subpoenas and search warrants and sending the prior notice

12:03:45 For those things that are required by FERPA,

12:03:49 And I'm sure Nicholas really talked about the overall general program here.

12:03:56 So that's really all I have. The project this year with the categorizing records

12:04:02 And setting retention schedules is

12:04:05 Every time we start talking about it, it just gets bigger and bigger. So it's definitely a challenge.

12:04:11 We're right now looking at

12:04:13 Microsoft Purview as an option.

12:04:16 And also another company called Spirion. So as I get more information and as we figure it out, I'll be happy to share that with everyone.

12:04:29 Okay, thank you, Tracy. Does anybody have any questions for Tracy?

12:04:39 So that does conclude. I think we've given everyone a chance to speak.

12:04:44 that was on the call.

12:04:46 Oh, I'm sorry. I am going to go to...

12:04:50 T from the Library of Virginia to

12:04:53 introduce herself and share some information from the library.

12:04:58 Hi, everyone. It's T here at the Library of Virginia.

12:05:02 I wanted to just follow up from October's meeting we do um

12:05:08 have a focus group for special education. I did send an email out and

12:05:12 we don't have everyone on a call, but I did send an email out to those who wanted to participate in the focus group.

12:05:20 I didn't get much feedback on scheduling a date, but that was during the time when we had Thanksgiving and we're rolling into the Christmas holiday break.

12:05:28 What I'm going to do is send a follow-up email today to the people who have asked to participate.

12:05:35 so that we can get the ball rolling with that focus group. In addition to that, I'm looking forward to our next

12:05:43 PSRC meeting to talk about other revisions that I would like to make to GS2.

12:05:49 That schedule has some...

12:05:52 some series in it that I want more clarification on from the group. So I look forward to sharing that because I would like to make a major update.

12:06:00 to GS21 at the end of the school year.

12:06:04 So if you are interested and have not told me to join the PSRC focus group for special education.

12:06:11 Please feel free to email me. Or if you would like to just give your input without joining the focus group, you can just simply email me.

12:06:20 your expression or any concerns you have at your school system, that is totally fine. And I can bring that back to the group.

12:06:27 So other than that, I look forward to sending out that email to get a date solidified. I would like to have one in January to get the ball rolling.

12:06:37 That way I can advocate and connect you with VDOE so they can make changes to

12:06:43 their scholastic records.

12:06:46 document that they have.



12:06:48 Other than that, from my standpoint.

12:06:50 Just like we had Fort Smith Public Schools say

12:06:55 I am more than welcome and more than happy to speak with you at your public school. You can schedule me to come out or we can do a one-on-one

12:07:03 or with a group virtually. I am here to support you, train you, and train your staff on

12:07:10 the management of records.

12:07:12 In addition to that, if you would like for me to come out, I just ask for you to have at least 25 people so that I can host a training with you.

12:07:20 In addition to that, I don't have to have a conversation just with you and your registrars. I can talk to your IT people.

12:07:28 to your administrators.

12:07:30 That is what I'm here for. I have one school system. I have had five meetings all together to speak to different people in different departments that impact records management.

12:07:40 So the point I'm making is that I'm here for you. Feel free to call me or email me so we can set that up.

12:07:49 That is all that I have for the Library of Virginia standpoint. Did anyone have any questions for me?

12:08:02 I'll take that as a no. Of course, I am here for you whenever you need me.

12:08:07 Okay, I'm noticing. Thanks, T. I noticed that uh

12:08:11 I bypassed Jennifer test. Jennifer?

12:08:14 Did you want to share with the group?

12:08:17 Hey there, it's okay. I wasn't going to say anything. My name is Jennifer Test. I'm the records manager and FOIA officer for the York County School Division.

12:08:28 We have about 19 schools and 13,000 students.

12:08:33 We're number one in the region and we're the number three division in the state of Virginia. So very proud of that.

12:08:41 I am the records department here. It's just me and I also have a temp worker

12:08:46 I've been in this position for about a year and a half now.

12:08:51 I oversee everything records for the division, record trading for all of our clerical staff to include a registrar. So we train twice a year.

12:09:01 We're responsible for the retention and destruction of all of our records throughout the division. I am the proving officer on our for

12:09:10 RM3 forms.

12:09:13 We use scribbles for transfer to transfer schools as well as

12:09:20 records requests for alumni graduation verifications, and we also use laser fish for storage

12:09:31 Other than that, I do have something to throw out there to you guys as a question about what your division does.

12:09:42 um but uh

12:09:44 in speaking with another local division, they told one of our registrars, when a transfer student comes in that

12:09:53 their birth certificate does not transfer with the cumulative folder.

12:09:58 Now, that is something that their attorney advised them on.

12:10:03 We do transfer a copy of the birth certificate with a cumulative folder and that is something that our attorney is vetted. So reaching out to you guys, what do you guys do with birth certificates when you're transferring it to

12:10:16 another school for one of your students.

12:10:23 Anyone?

12:10:29 T, do you have any...

12:10:29 I'm from such a small division that we don't have a lot of students switching between schools, but we keep the birth certificate with the cuminum.

12:10:36 cumulative record if it were to occur.

12:10:37 Okay.

12:10:39 Okay, thank you.

12:10:49 We do not keep the birth certificate.

12:10:52 Your birth certificate number is written on the back of a cumulative folder.

12:11:00 So did you just mean transfers within your division or outside the division?

12:11:06 Outside the division.

12:11:07 Okay.

12:11:11 We keep the birth certificate in the QM folder unless the parent objects. Otherwise, the registrar

12:11:18 visually confirms it and they don't keep it. But as far as outside transfers, I don't believe they are sending those here.

12:11:28 Okay.

12:11:36 any other divisions purged the birth certificate before you transfer to another division?

12:11:42 So to my knowledge, Virginia Beach.

12:11:47 verifies the birth certificate but does not necessarily keep it in the cumulative record.

12:11:53 But we've also in our survey found that that was being inconsistently applied.

12:11:58 But to my knowledge, it's verified but

12:12:01 not kept.

12:12:03 Okay. Thank you.

12:12:06 So I know that when I register a student, the copy of the birth certificate

12:12:12 placed in the file. I'm not sure.

12:12:18 how long it stays in the file.

12:12:23 Okay.

12:12:29 In Prince William County, we do

12:12:31 Thank you.

12:12:32 We do retain it. The parents provide it during the registration process. We retain it as part of the record.

12:12:40 And we are, I think, holding on at

12:12:42 current time holding on to it.

12:12:44 for the long-term retention.

12:12:47 Our school division, our schools

12:12:49 do send it out with the

12:12:51 packet they prepare for records going to.

12:12:54 Another school.

12:12:58 And you did so.

12:12:57 Okay. Yeah, it's just interesting that, you know, two separate

12:13:01 divisions, two different attorneys, both have different takes on it.

12:13:05 So I was just curious to see what everybody else does.

12:13:09 Thank you.

12:13:11 Hey, Nicholas, did you say that you keep it with the long-term cumulative file for a student?

12:13:17 Great. This is T. This is all great feedback because this has been

12:13:22 a topic where

12:13:24 school divisions vary with if they keep

12:13:26 the birth certificate in general or in short or long-term human to file.

12:13:32 So this feedback is great for me to take back to the VDOE. At the end of the day, we're learning that localities are still going to choose what's best for them.

12:13:40 But from the LVA standpoint, I am trying to get more clarification

12:13:44 Just to put it out there to you all.

12:13:48 Thank you, Ms. Jennifer, for pointing this out, even though you were talking about transfer students.

12:13:52 No, absolutely. Thank you.

12:13:55 I do have one more thing to add there.

12:13:57 We also have internal birth certificate affidavit.

12:14:01 which then the code that

12:14:04 if they don't have the birth certificate, it references an affidavit.

12:14:07 I think it's probably up to the

12:14:10 school division to create their own affidavit of

12:14:13 how they want it to look and what information they want.

12:14:16 But that affidavit

12:14:18 is not listed on the GS21, to my knowledge

12:14:22 of any type of retention of how to keep it or how long to keep it. It is not.

12:14:27 I remember Tracy emailed me about that, and correct me if I'm wrong, Tracy, about getting

12:14:34 retention series to reflect

12:14:35 the affidavit for the affidavit for

12:14:38 Birth certificates and also proof of residency as well. We talked about that. So this has been a topic discussion that I've had with Rutgers officers.

12:14:48 Yeah, and I'd like to add another one that um

12:14:52 we keep long term, even though the series says short term and that's the registration form.

12:14:58 And we found that we found that

12:15:00 we go back to it so often, even for former students

12:15:05 that we've just found that it's helpful to keep it

12:15:10 Especially when you need parent information and we get a lot of requests related to immigration. So we have been keeping that long term and I look at the retention schedule and it

12:15:19 You know, it makes me cringe a little bit because I know that we're doing something outside of that timeline.

12:15:26 Just getting some clarity on where we have that leeway would be helpful.

12:15:33 I find the registration forms are very helpful. We keep them as well.

12:15:41 I got you.

12:15:45 We have Lois.

12:15:47 Is it Ritgar that joined the call? Lois, would you like to um

12:15:52 Share with the group. Tell us who you are in your school division and share some information.

12:16:20 I'm not sure that her audio came through, but she did get introduced earlier with me. She's a record specialist for the city of Virginia Beach.

12:16:29 Her Zoom is not 100% up and running if you didn't hear her.

12:16:33 Okay. Okay. We appreciate that.

12:16:36 Thank you, Alexandra.

12:16:40 So I think everybody's had a chance to speak. I hope that you all found this networking session

12:16:47 where we can introduce ourselves and talk about our divisions

12:16:51 helpful. I think maybe it started the conversations

12:16:56 You found somebody that's similar to you that you want to follow up with individually.

12:17:01 Please do so.

12:17:03 I always used to heard the terminology of don't stay in your silos.

12:17:09 I always use that.

12:17:11 as a...

12:17:14 having a dairy farming family in my background, I use that farming reference of

12:17:18 Get outside of your silo. Talk to other school divisions.

12:17:21 Go visit them.

12:17:26 and and

12:17:26 It's always a learning opportunity. You make connections and you

12:17:31 can learn something and can learn something

12:17:33 You have some takeaways and you see how people do things differently. That might be better than what you're doing.

12:17:40 might be worse, but there's always something to look at and to share.

12:17:45 There were some commonalities. I noticed a lot of people that participated in the PSRC are records officers with the Library of Virginia.

12:17:53 I think some commonalities we mentioned were training was key for our

12:17:58 people in records management positions or school registrars

12:18:02 And then I also noticed we have a lot of people that work in

12:18:07 Financial. Finance.

12:18:10 So maybe that would be an area that we could expand upon in one of the PSRC meetings.

12:18:17 And I noticed that in the smaller divisions, you wear many hats.

12:18:20 And the larger divisions you might be more focused on a certain area.

12:18:26 Just a little, so I thank you all for participating and coming to the meeting.

12:18:30 I did want to give a little heads up for future meetings. We have a confirmed speaker.

12:18:38 For the February and April meeting, at least one confirmed speaker.

12:18:42 We're going to have...

12:18:44 The library, I'm sorry, the University of Virginia

12:18:49 Records management department speak at our February meeting.

12:18:53 And then at that.

12:18:55 our April meeting, we're going to have Alan Gerhart from the FOIA Council.

12:19:01 that will be speaking.

12:19:05 I'd still want to put that plug out there one last time about leadership for the next school year.

12:19:12 Please reach out if you are interested.

12:19:15 If you know someone that's interested, encourage them.

12:19:19 But our goal would be to have the leadership team, candidates or volunteers.

12:19:27 presented at the February meeting.

12:19:29 And then have them in place by the end of the April meeting so they can take over for

12:19:35 The 25, 26 school year.

12:19:40 I believe that's all we have for the meeting today. Before we dismiss, is there anybody that has

12:19:47 any...

12:19:49 like Jennifer threw out that question there is anything that you all would like to discuss that's

12:19:56 pressing that you want to share with the group before we depart.

12:20:00 or conclude the meeting.

12:20:02 I did have one question. Everybody kind of

12:20:07 circled around, it was mostly focused on paper records

12:20:12 Now, a lot of things have gone digital. Things are being transferred, like from PowerSchool to digital.

12:20:18 the transcripts, you know, they clearly articulated

12:20:23 documents that are within documents that are within

12:20:25 the GS21 schedule.

12:20:27 However, like for SPAD records and for other records

12:20:32 there are...



12:20:33 emails that frequently become part of a student's record.

12:20:37 So how do you, does anybody have or know what their IT process is for dealing with those emails?

12:20:55 I think that's one of our biggest challenges right now, especially with IDEA and the Virginia Procedural Safeguards saying that

12:21:03 any email related to special education should be maintained with the child's special education record

12:21:08 And we are really challenged right now.

12:21:12 with doing that. And that's the project that we're doing this year is to try to get a handle on that. Are we going to

12:21:19 use some type of email.

12:21:21 And is it going to be manual or is it going to be something that's AI generated using keywords?

12:21:28 And we just, if anybody has figured that out, I would love, love to have a bigger discussion.

12:21:35 We're looking right now at

12:21:38 some things that we can use in conjunction with Microsoft Curview.

12:21:43 that will sit on top of purview

12:21:45 and run some of these searches and tags for us.

12:21:50 I'm not the most technical when it comes to the IT terms.

12:21:54 But as I learn more, I'll be happy to share. And I would love for anybody to share any information they have on that.

12:22:01 I know in the past it was if this email needs to be part of the student record, you print it out and put it in the folder.

12:22:08 But we know that's not consistently applied.

12:22:15 And if somebody gets an email in the first grade

12:22:18 and they graduate, then it needs to be seven years past graduation date. So you could be talking close to 20 years.

12:22:25 Right.

12:22:29 Okay, thanks.

12:22:33 Kind of along those similar lines. And as we're talking about the special education records.

12:22:38 When you look at the children that are receiving services throughout their whole time with the school division.

12:22:44 That's another challenge that we're facing are those

12:22:47 Data collection sheets.

12:22:49 So the teachers collecting data every day

12:22:53 Maybe it's handwritten, maybe it's in a log

12:22:57 But what are schools doing to store that information

12:23:01 And how long are you keeping it? And in talking with my special ed office.

12:23:06 they're saying, well, we have to keep it at least two years

12:23:10 because of due process.

12:23:13 But there's really nothing in the retention schedule. And I've talked to T about this that says we can get rid of it because it's special education.

12:23:21 But if you have a kid that's getting speech, occupational therapy as a behavior plan.

12:23:27 And they're getting daily reports on all of these services that they're receiving.

12:23:31 what are people doing with those data collections?

12:23:56 We don't have any other comments.

12:23:59 For questions?

12:24:01 Want to let everybody know our next meeting will be held on Wednesday, February the

12:24:06 12 of 2025.

12:24:10 We do have, again, the University of Virginia caroline

12:24:15 Walters is going to be a speaker.

12:24:19 topic yet to be determined, but we will have that set up before the February meeting and let you all know what it is.

12:24:26 We do encourage you.

12:24:28 come out and see us at the library. We are here in person.

12:24:32 and also

12:24:34 having the hybrid option of joining us online.

12:24:38 So without any further discussion.

12:24:42 We will dismiss the meeting. Thank you so much.

12:24:45 Thank you for participating. Have a good day.2 – Meeting Closed Caption from presenters at todays meeting.