

[Virginia Public Schools Records Consortium \(PSRC\)](#)

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

Library of Virginia, 800 E. Broad St. Richmond, VA 23219
Represented by Chad Owen, Records Management Manager
(chad.owen@lva.virginia.gov)

PSRC Meeting Minutes
Wednesday, March 6, 2024
10:00 AM-1:00pm

Meeting format: Hybrid (In-Person & Virtual)

FERPA & Student Records

Welcome and introductions: (in attendance)

Name	School Division
Amy Babines	Virginia Beach City
Amy Hardy	Pittsylvania
Amy Snodgrass	Mecklenberg
Babara Rypkemaba	Lynchburg City
Becky Moore	Fauquier
Carolyn Karawa	Fairfax
Chad Owen	LVA
Charise Ward	Norfolk
Christina Parlow	Chesterfield
Cindy Pikerall	Roanoke
Darlene Gorman	Chesapeake
Demetrice Samuels	Essex
Elizabeth Donaldson	Fairfax
Jean Harper-Smith	Frederick
Jennifer Test	York
Jessica Hawks	Danville City
Julie Lewis	Middlesex
Laura Beth Mattson	Virginia Beach City
Leorie Mallory	Brunswick

Name	School Division
Lucero Santa Cruz	Fairfax
Meade Harris	Albemarle
Melanie Terrell	Hanover
Melissa Hanes	Buckingham
Michelle Brittgan	Albemarle
Michelle Cassell	Grayson
Miranda Ball	Augusta
Molly Shannon	Fairfax
Nicholas Minor	Prince William
Pam Stewart	Loudoun
Pearl Jamison	Culpepper
Rachel Johnson	Loudoun
Rae Henderson	Campbell
Renee' Blackshear	
Shannon Berna	Fredericksburg City
Sheila Eggleston	Powhatan
Stephanie Burch	Lexington
Susan Gardner	Williamsburg-James City
Susan Leonard	Henrico
Tracey Beaver	Prince William

AGENDA for March 6 Meeting

VIRGINIA PUBLIC SCHOOLS RECORDS CONSORTIUM (PSRC)

Location: Library of Virginia (Richmond, VA) and Virtually on Zoom

Date: March 6, 2024

Time: 10:00 a.m. – 1:00 p.m.

Agenda Items

10:00 – 10:30	Welcome Introductions January Meeting Minutes
10:30 – 11:30	Records Management – The Basics and a Bit More <i>Chad Owen – Library of Virginia</i>
11:30 – 11:45	Break
11:45 – 1:00	Complete Educational Records Requests – Sharing of Processes and Discussion <i>Pam Stewart - Loudoun County Schools</i> <i>Tracey Beaver – Prince William County Schools</i>

Remaining Scheduled 23-24 Meetings.

In-person physical meeting location: (we will also support virtual attendance)
Library of Virginia, 800 E. Broad St. Richmond, VA 23219

May 15, 2024 – 10am – 1pm with Library of Virginia room scheduled until 2.

Ongoing meeting dates to be determined.

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 January 24, 2024 were unanimously approved and will be posted on the Library of Virginia website.

PRESENTATIONS:

Chad Owen, Records Management: A Bit Beyond the Basics.

1. VIDEO Presentation uploaded to the LVA PSRC website.
2. The Slideshow is appended to these minutes (ATTACHMENT A)
3. Q&A included with the Video presentation.
4. The presentation saved chat is appended to this document (ATTACHMENT C)

Complete Educational Records Requests – Sharing of Processes and Discussion

Pam Stewart - Loudoun County Schools

Tracey Beaver – Prince William County Schools

1. VIDEO Presentation uploaded to the LVA PSRC website; this is a continuation of the first presentation.
2. Loudoun screen displays are embedded in the VIDEO presentation.
 - a. To be appended.
3. Prince William FERPA Slideshow (ATTACHMENT B)
4. Q&A included with the Video presentation.
5. The presentation saved chat is appended to this document. (ATTACHMENT C)

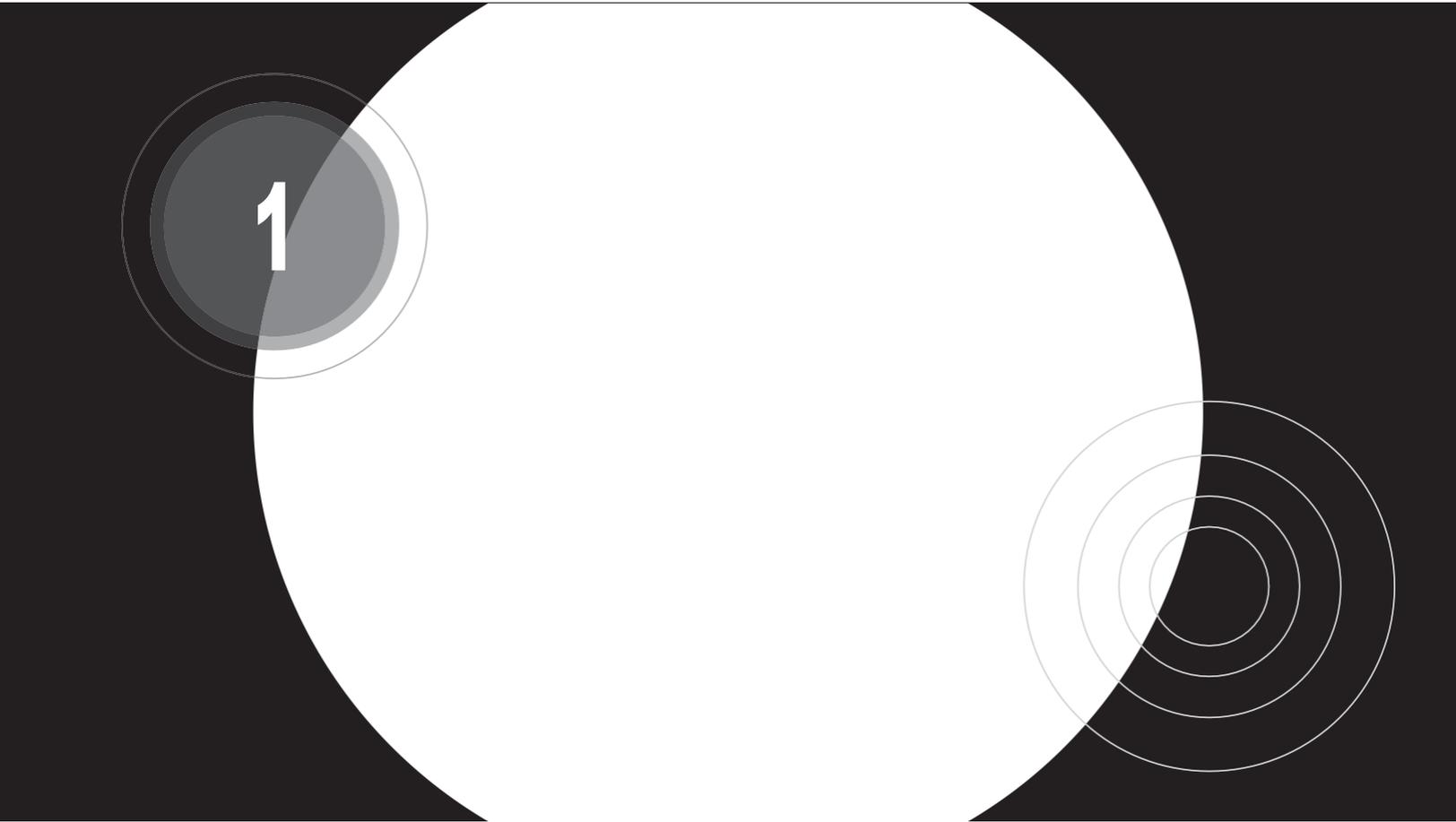
ATTACHMENT A:
Chad Owen, Records Management: A Bit Beyond the Basics.

The logo for the Library of Virginia, featuring the text "LIBRARY OF VIRGINIA" in a serif font next to a colorful icon of three books. The logo is enclosed in a circular frame with a thick black border and a thin white border.

LIBRARY
OF VIRGINIA

A grayscale photograph of a desk setup. In the foreground, a spiral-bound notebook lies flat. Behind it, a laptop is partially visible. In the background, a potted plant with long, thin leaves sits in a light-colored pot. The scene is softly lit, creating a professional and organized atmosphere.

A Bit Beyond the Basics



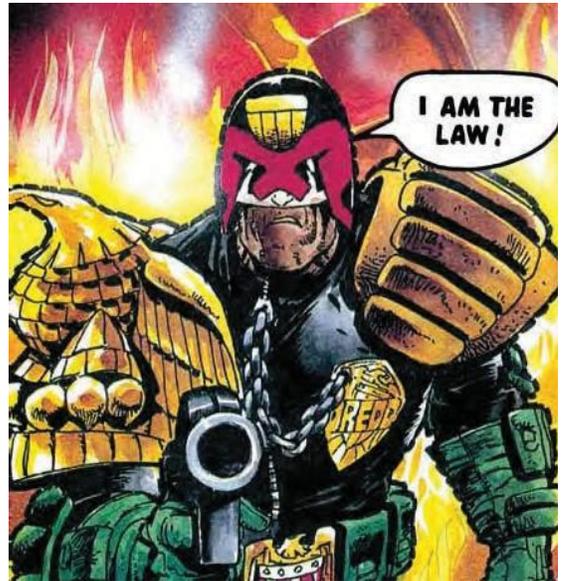
1

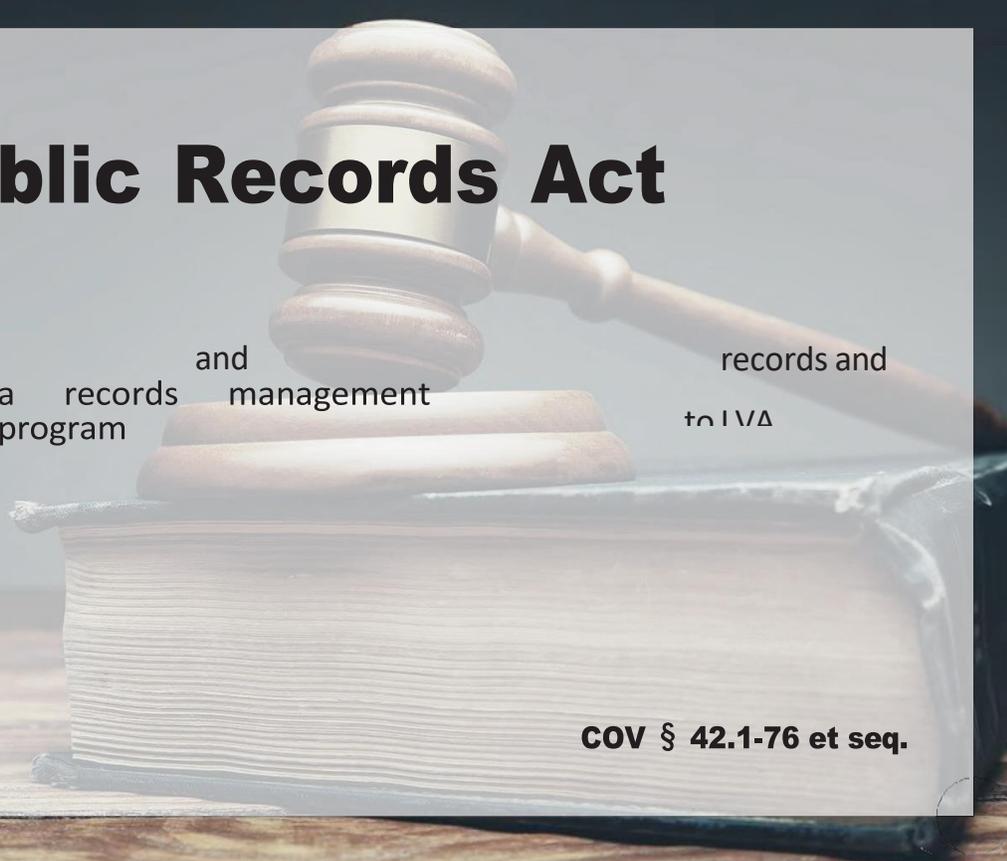
Records management facilitates access and efficiency.



2

The records you create when conducting government business are **public records.**





Virginia Public Records Act

a records officer

and
a records management
program

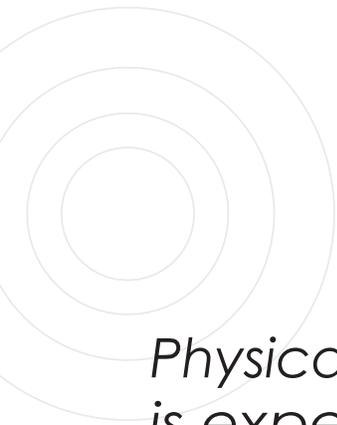
records and
to IVA

COV § 42.1-76 et seq.

3

Institutional knowledge is lost when that knowledge is not documented, organized, and accessible.





*Physical storage
is expensive!*

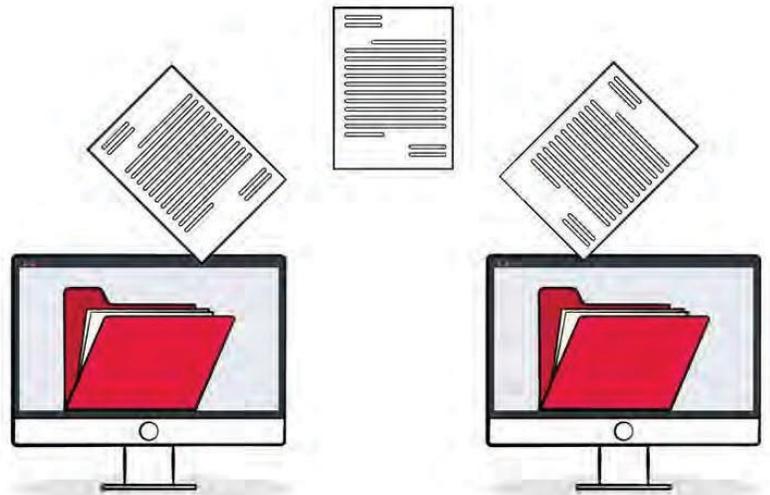
*Storing a single filing
cabinet can cost over
\$200/month.*





Digital storage is also expensive!

Data migration can cost **tens of thousands** of dollars – especially in systems bloated with obsolete records.

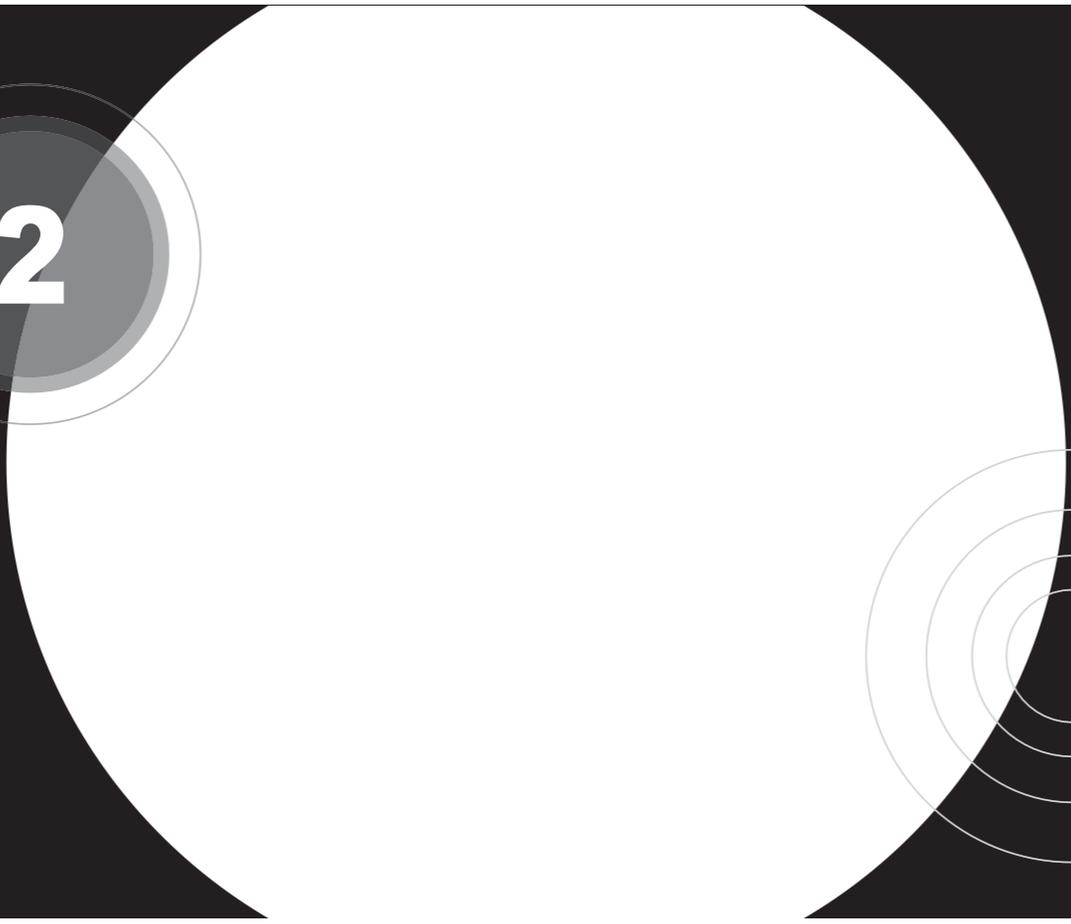




The cost of discovery & e-discovery

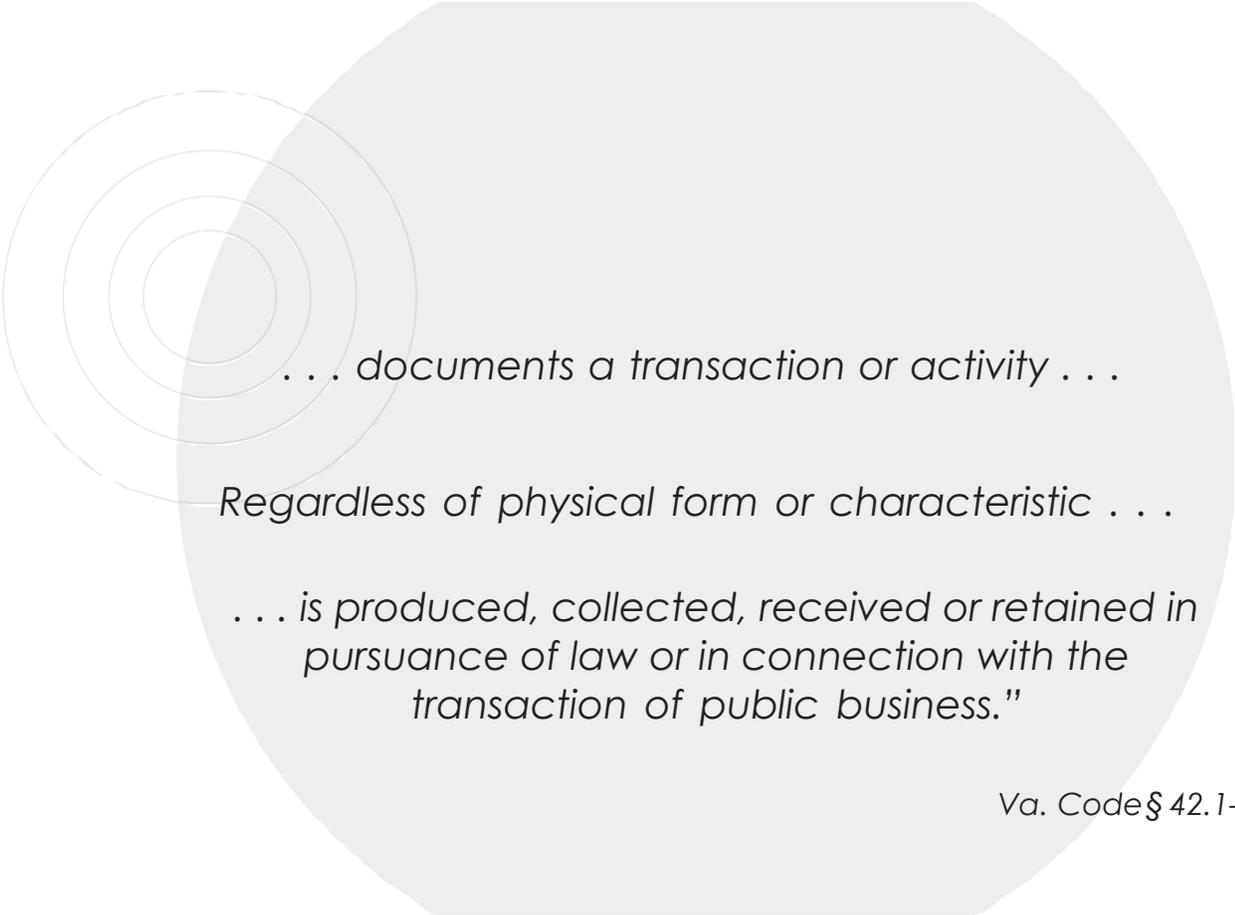
3. In a lawsuit, records can be subpoenaed regardless of age
4. "Spoliation of evidence"
5. Practice **defensible disposition**





2



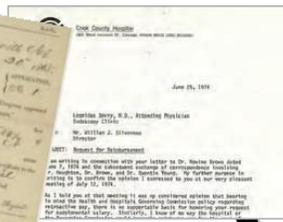


. . . documents a transaction or activity . . .

Regardless of physical form or characteristic . . .

*. . . is produced, collected, received or retained in
pursuance of law or in connection with the
transaction of public business."*

Va. Code § 42.1-77



- 
- ❑ Email is a format and can contain many kinds of records.
 - ❑ Keep personal and work email separate.



not

reference materials,
trade journals,
listserv messages,
spam, informal
notices, out of office
messages





not

COPIES

duplicates

(extra copies kept for convenience;
stocks of publications)

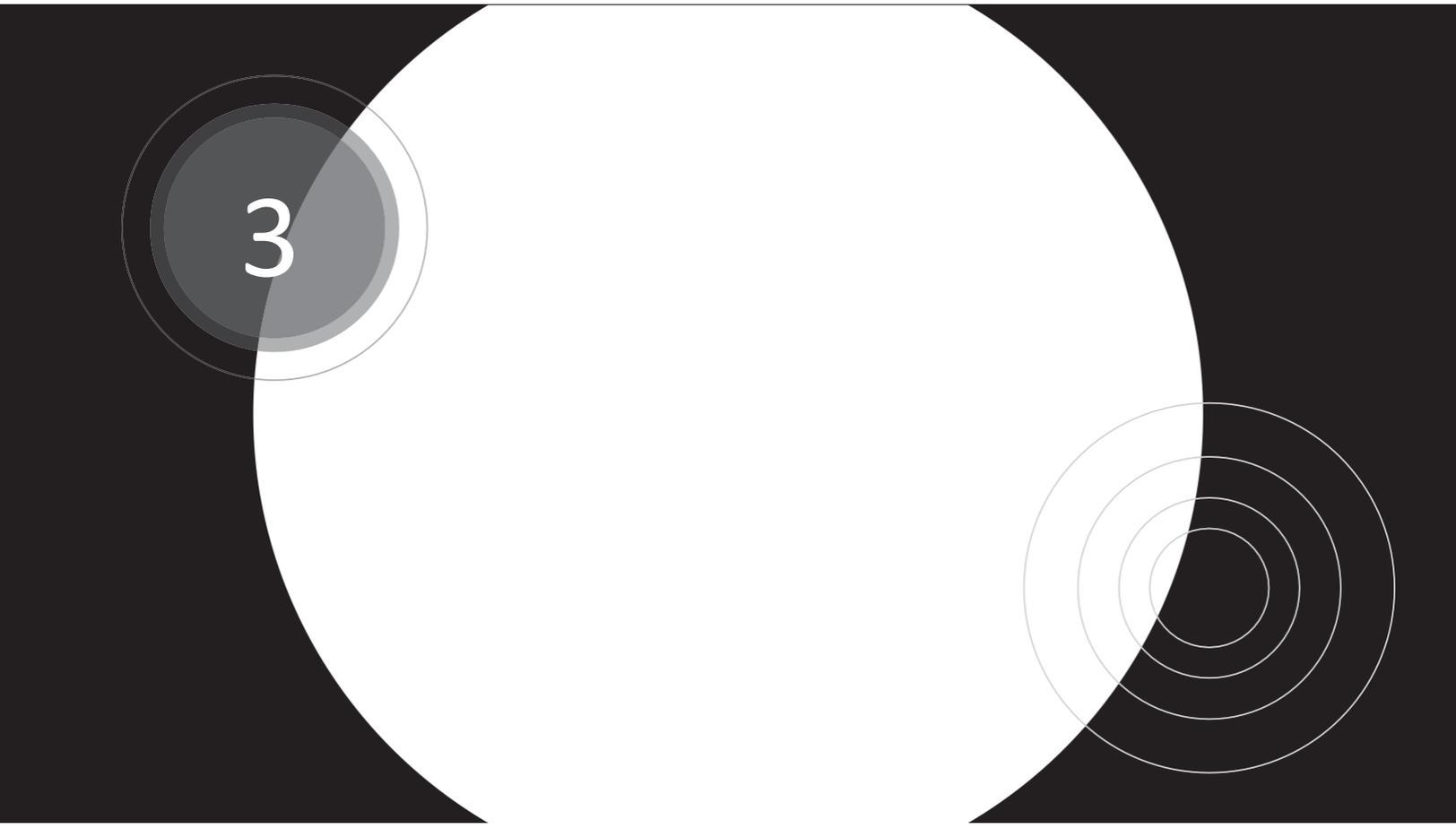


public records

open records

- *Public records can be open or closed.*
- *Examples of closed records:*
 - *attorney-client privileged records*
 - *attorney work product*
 - *minutes of closed meetings*
 - *vendor proprietary information software*
 - *records protected by HIPAA, FERPA*





3



Records Management

ion at the Library assists state
throughout their life cycle.
records by publishing records
non-permanent records, and

CONTACTS

[Records Management](#)

[Records Management & Archives](#)

[Privacy](#)

[Accessibility](#)



RECORDS RETENTION AND DISPOSITION SCHEDULE

GENERAL SCHEDULE NO. GS-02

← Schedule number & title

COUNTY AND MUNICIPAL GOVERNMENTS

Fiscal Records

EFFECTIVE SCHEDULE DATE: 8/9/2012

RECORD SERIES AND DESCRIPTION	SERIES NUMBER	SCHEDULED RETENTION PERIOD	DISPOSITION METHOD
Insurance Records and Reports This series documents insurance coverage carried by the locality, such as commercial policies, third-party coverage, and self-insurance programs. This series may include, but is not limited to: insurance policies, claims, invoices, and investment files.	010165	Retain 3 Years after end of state fiscal year	Confidential Destruction
Payroll Records This series documents the payroll activities of the locality. This series may include, but is not limited to: deduction authorizations and registers, leave records, ledgers and reports,	200105	Retain 5 Years after end of state fiscal year	Confidential Destruction
Retirement Files: Locally-Managed Retirement System This series documents the locally managed retirement system. This series may include, but is not limited to: employee participating and financial documentation.	200417	Retain 3 Years after last action	Confidential Destruction

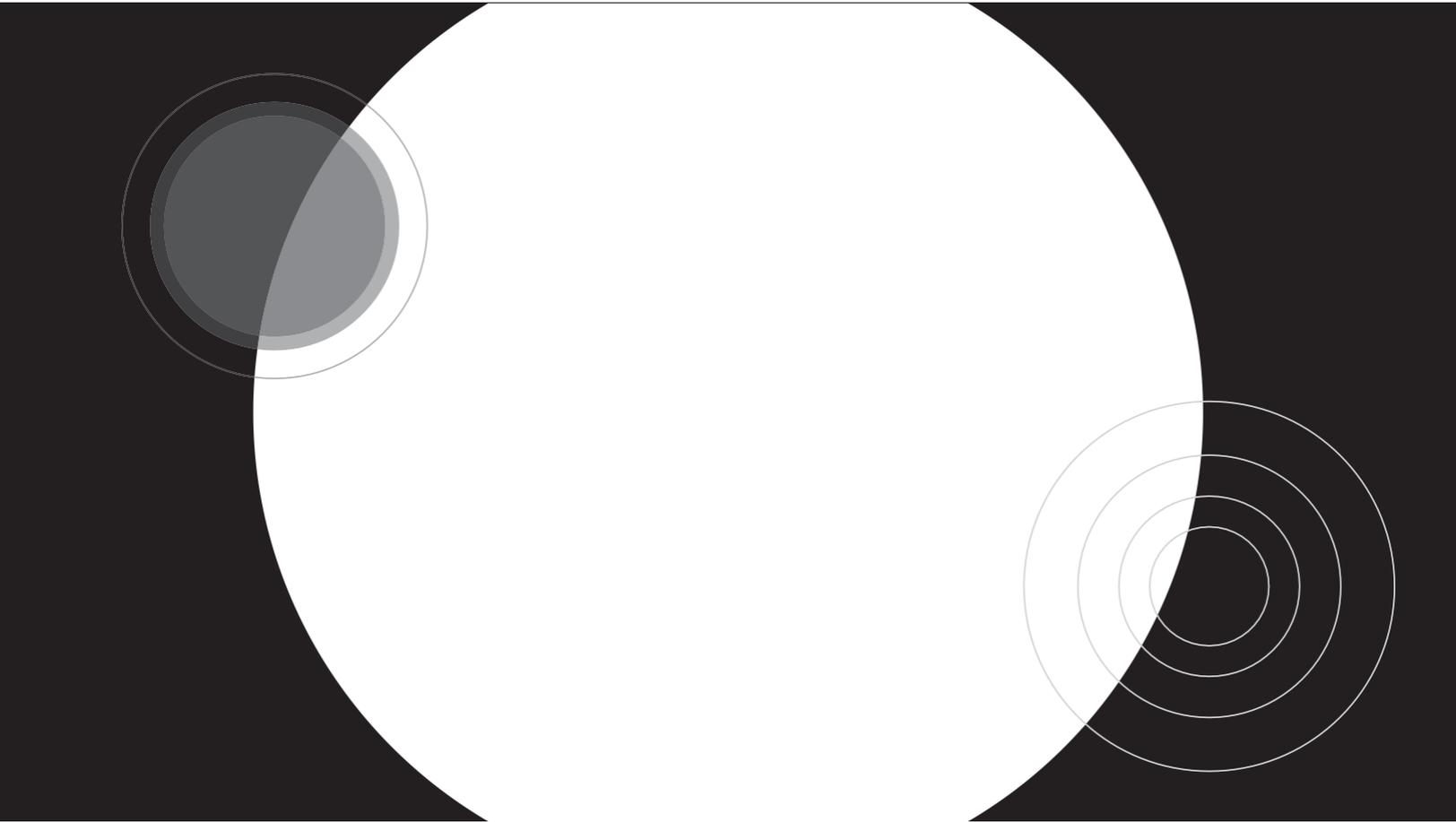
Series title

Series description

Series number

Retention period and cutoff

Disposition



Organize your electronic records like a grocery store. If you have a new person start tomorrow, they should be able to find records.

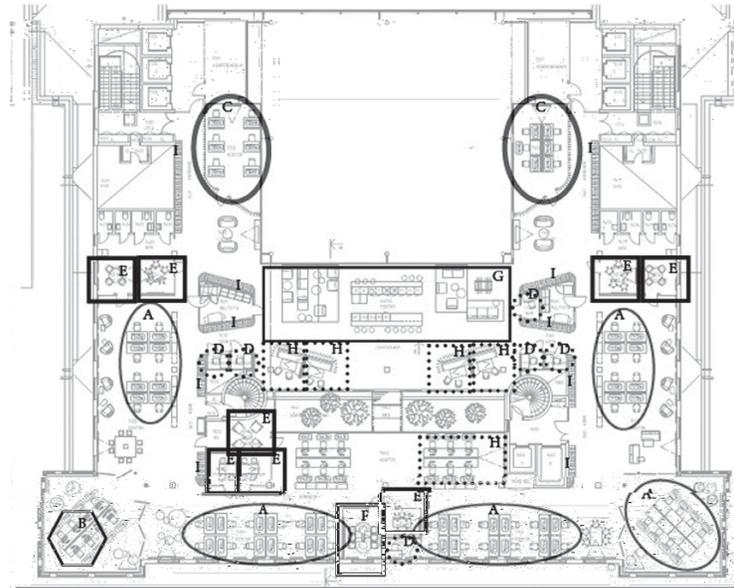
- If records are used together, keep them physically near each other.
- Go from general functions to specific functions to specific incidences.
- Consider clear alpha or chrono arrangement.



Name files so that they are easily organized and sorted by date and/or subject.

Keep records with similar security needs together under restricted access.

Where possible, keep frequently accessed records closer to people who use them.



Block time for email management on your calendar.

- *Read receipts*
- *SPAM/promotional emails*
- *Distributed messages*
- *Listserv messages*
- *Duplicates*
- *Meeting arrangements; accepted/declined meeting requests*

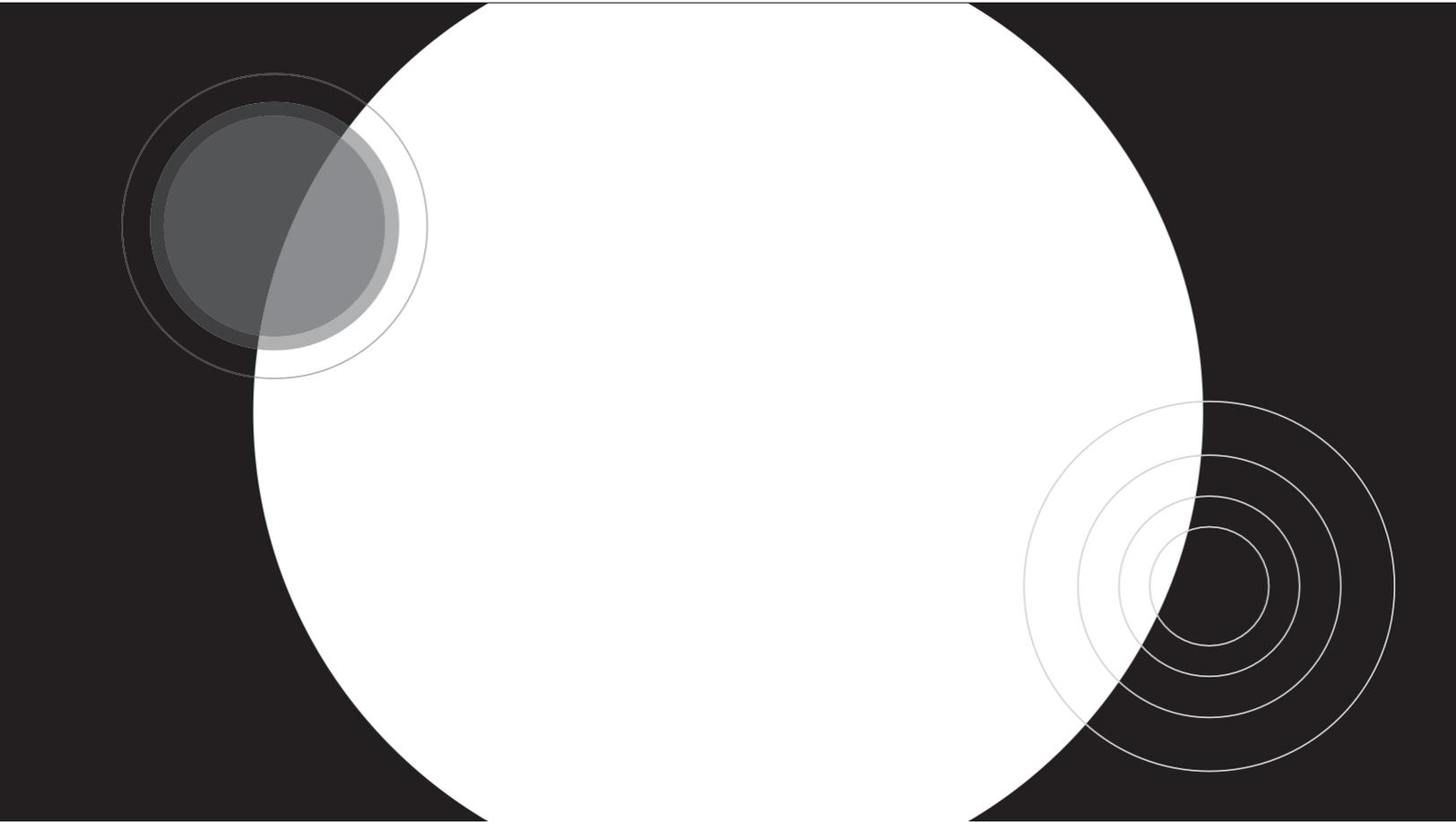
Manage both sent and received messages.

Assign a “record-keeper” on projects.

Keep only the final email in a thread.

Save significant records outside of email (including attachments).







Certificate of Records Destruction

Organization Information

STATE AGENCY OR LOCALITY

LOCALITY / REGIONAL ENTITY NAME

Locality / Regional Entity

Gloucester County

DIVISION / DEPARTMENT

Social Services, Dept. of

DESIGNATED RECORDS OFFICER

Diane Rebertus

Approving Official ?

APPROVING OFFICIAL'S NAME

APPROVING OFFICIAL'S TITLE

APPROVING OFFICIAL'S E-MAIL

CONFIRM APPROVING OFFICIAL'S E-MAIL

Records Management Forms

Submit forms that are completed in full and type-written.

Which form do I use?

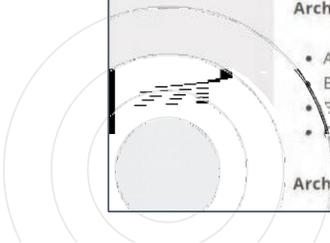
Archival Transfer List and Receipt (ARC-1 Form)

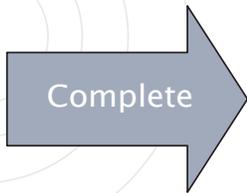
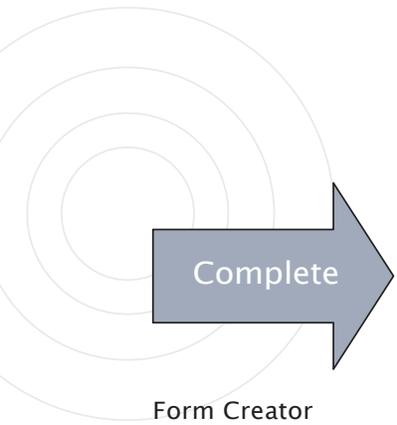
- [ARC-1 Preparation Instructions \(pdf\) \(video\)](#)
- [Blank ARC-1 Form \(Word\) Aug 2013](#)
- [Blank ARC-1 Continuation Form \(Word\) Jul 2012](#)
- [Completed Sample ARC-1 \(pdf\)](#)

Archival Transfer Folder List (ARC-2 Form)

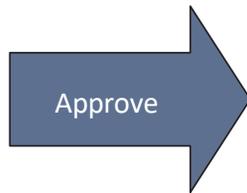
Certificate of Records Destruction (RM-3 Form) April 13, 2021

- [RM-3 Preparation Instructions \(pdf\) \(videos\)](#)
- [Reporting Destruction Tip Sheet \(pdf\)](#)
- [Volume Equivalency Table \(pdf\)](#)
- [RM-3 Form](#)
- [In-Progress Dashboard](#)
- [Completed Forms Search](#)



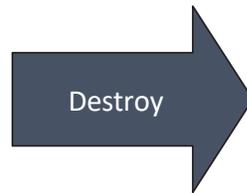


Form Creator
completes online
Certificate of
Records Destruction
(RM-3 Form)



Approving Official
receives email
notification and
approves

Records Officer
receives email
notification and
approves



Records are
destroyed

Form Creator or
Records Officer
confirms final
destruction and
closes form



In-progress certificates
may be reviewed via
dashboard

Completed certificates
may be viewed via LVA
website



CONFIDENTIAL DESTRUCTION

Shredding, pulping, burning

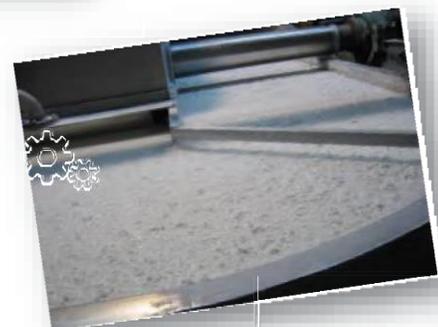
For electronic records: electronic shredding, overwriting the hard drive's free space, or magnetic-media degaussing

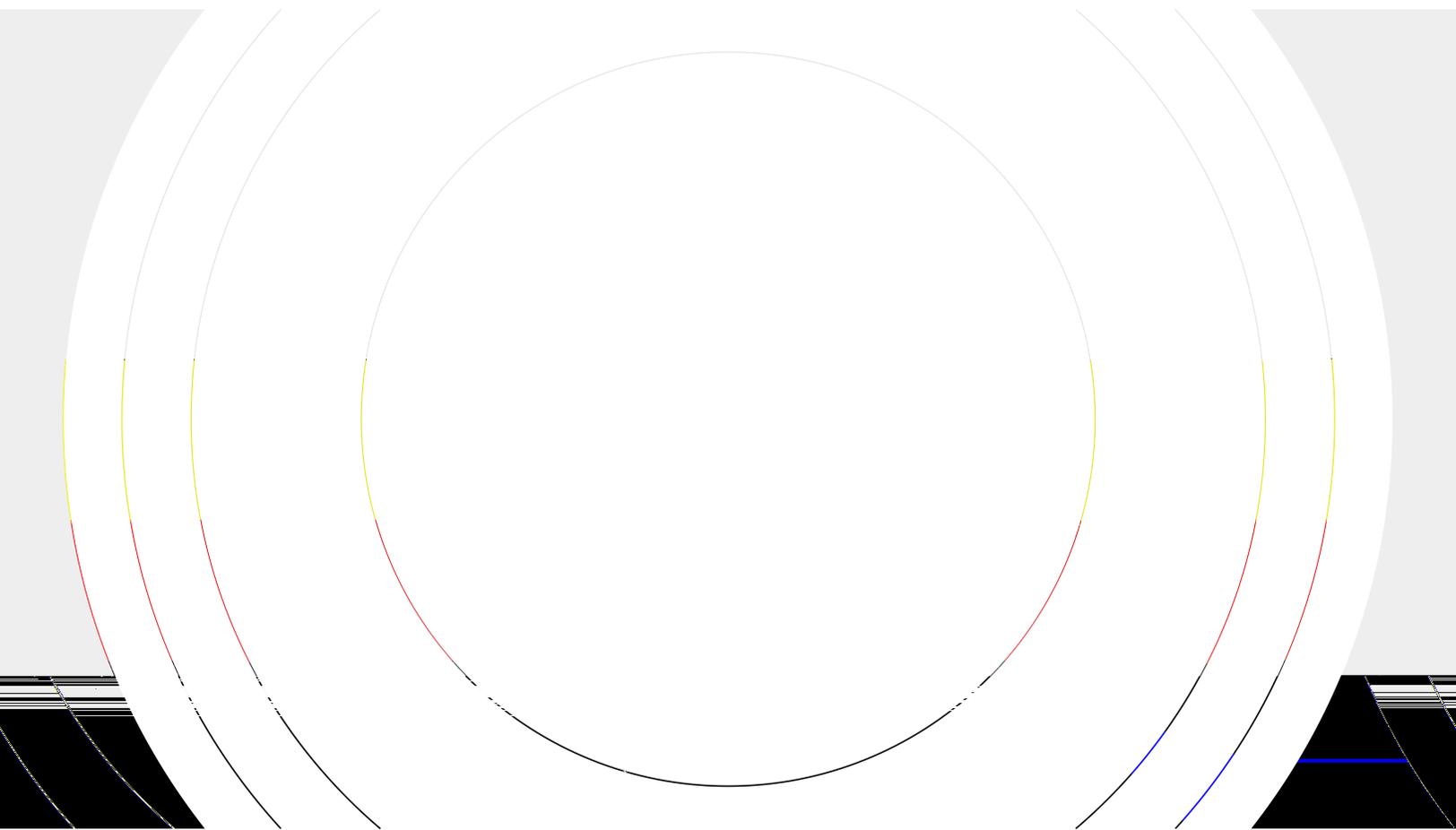


NON-CONFIDENTIAL DESTRUCTION

Landfill

Recycling



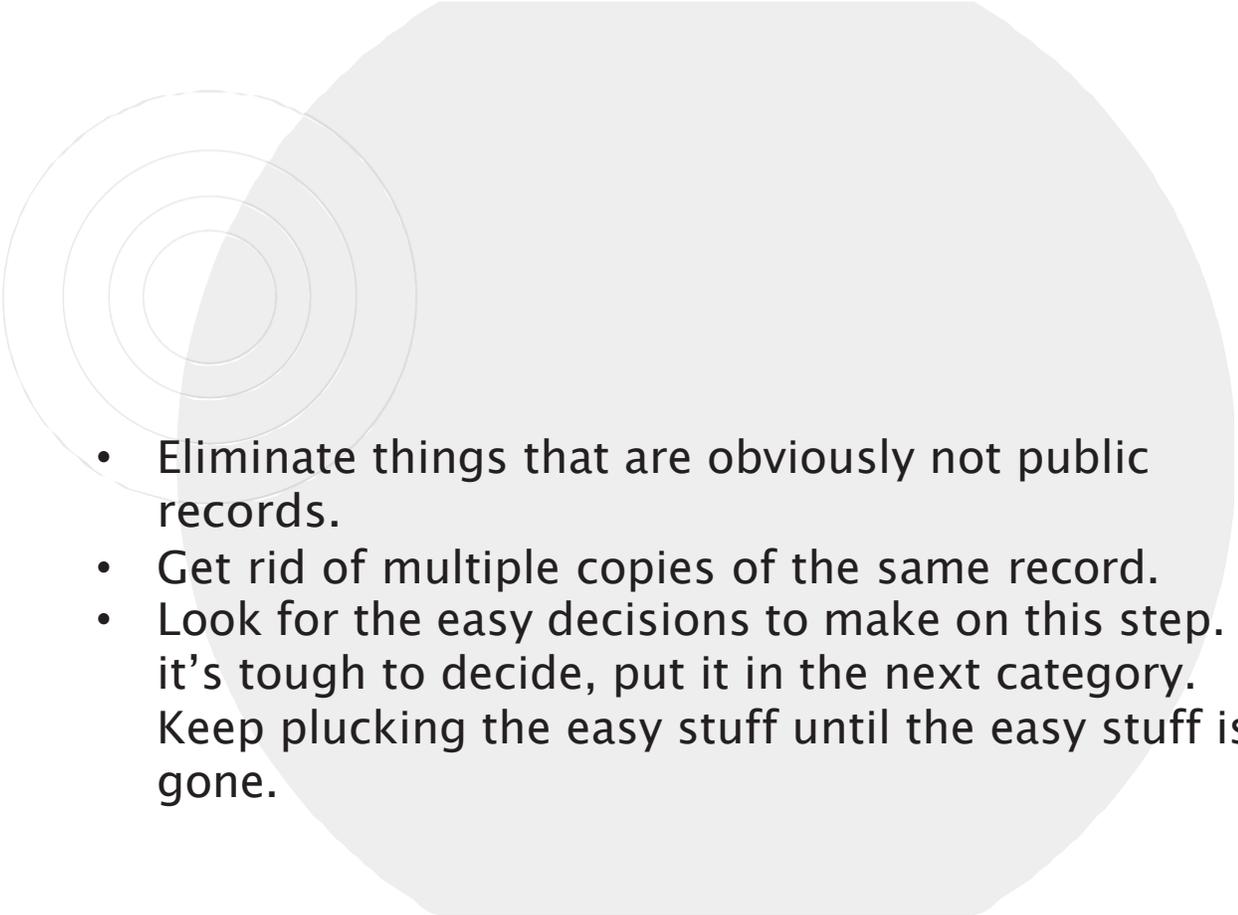


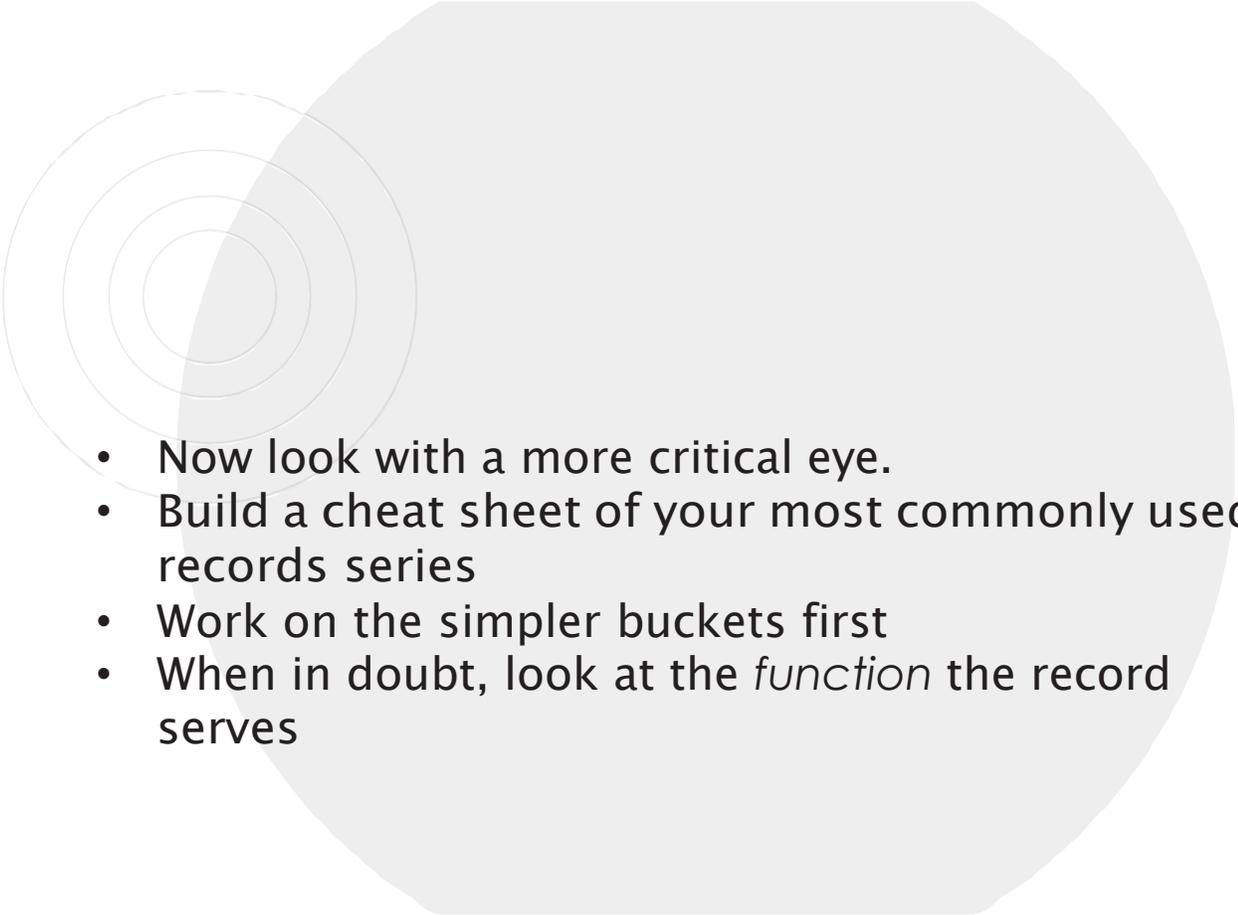


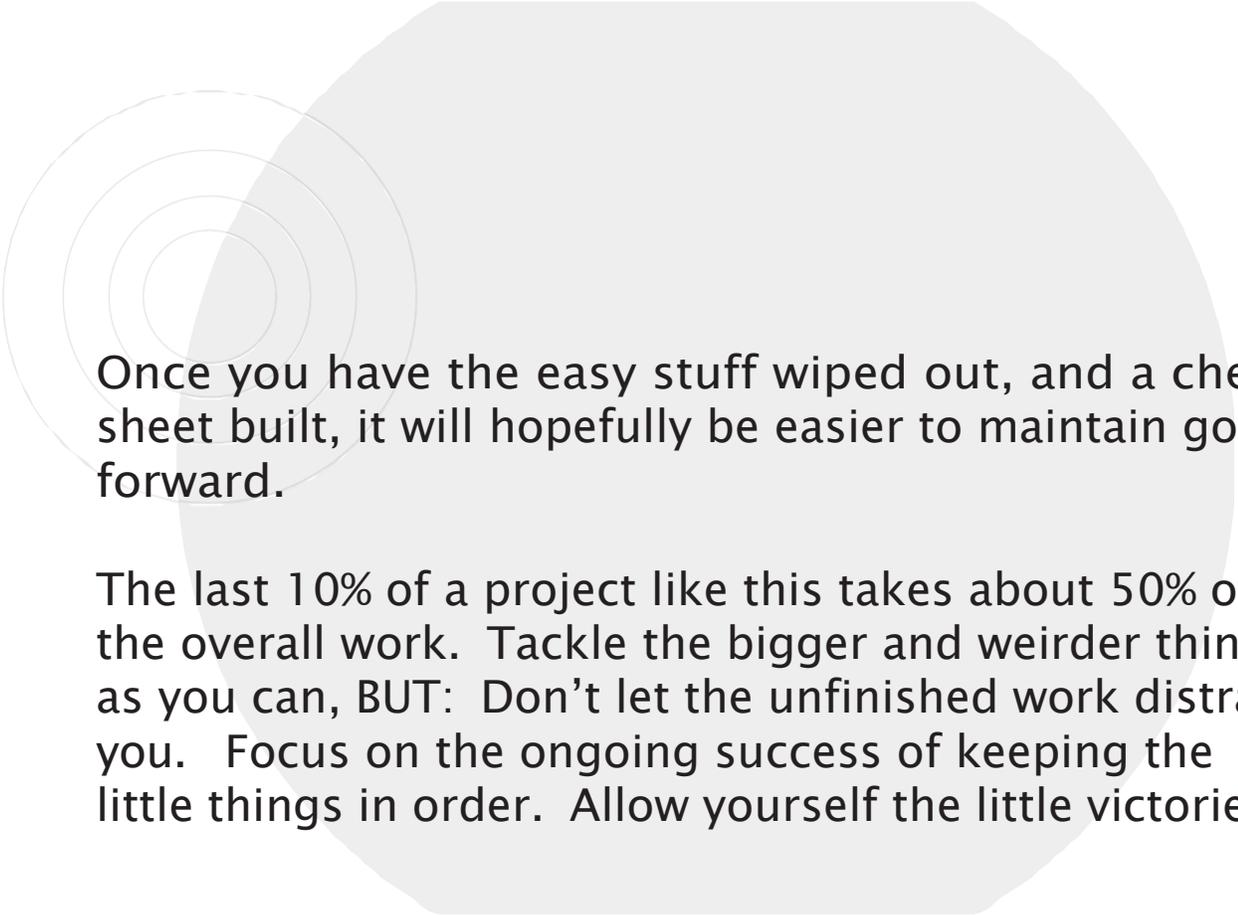


Evil
Records
Scoffla
W

Valiant
Records
Manager

- 
- Eliminate things that are obviously not public records.
 - Get rid of multiple copies of the same record.
 - Look for the easy decisions to make on this step. If it's tough to decide, put it in the next category. Keep plucking the easy stuff until the easy stuff is gone.

- 
- A decorative graphic consisting of a large, light gray rounded rectangle on the right side and a series of four concentric circles on the left side, overlapping the rectangle.
- Now look with a more critical eye.
 - Build a cheat sheet of your most commonly used records series
 - Work on the simpler buckets first
 - When in doubt, look at the *function* the record serves



Once you have the easy stuff wiped out, and a cheat sheet built, it will hopefully be easier to maintain going forward.

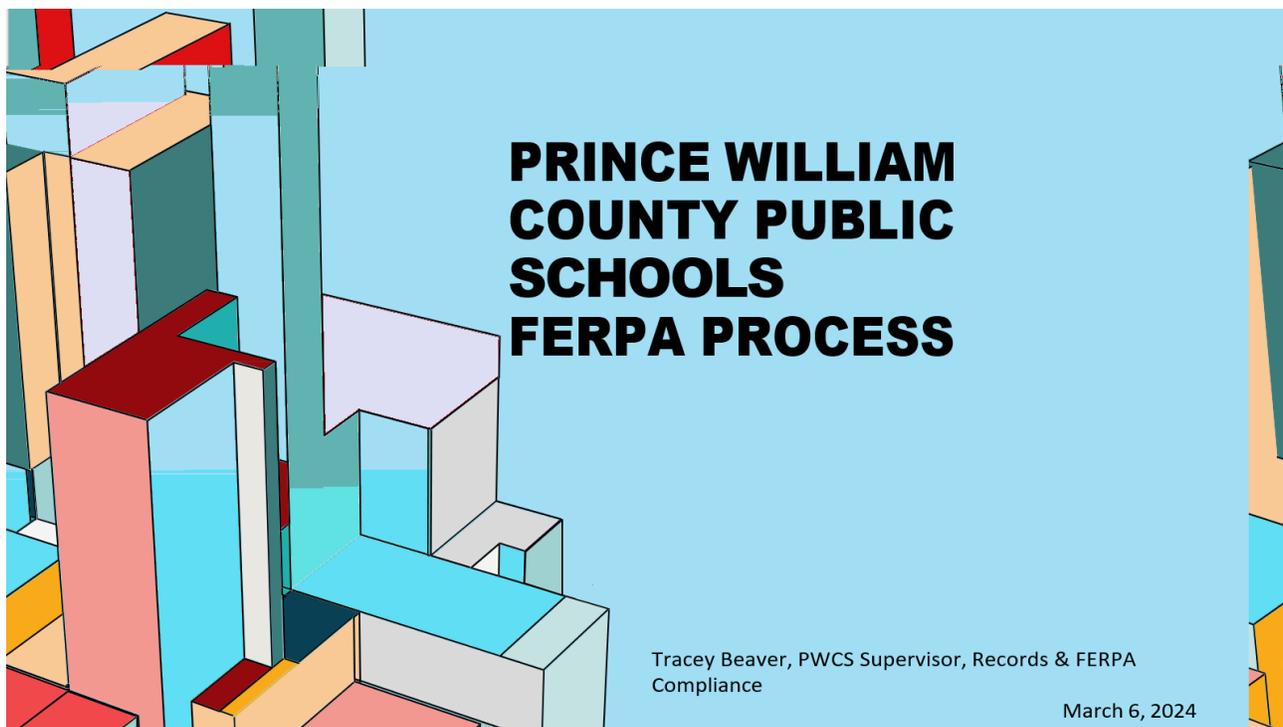
The last 10% of a project like this takes about 50% of the overall work. Tackle the bigger and weirder things as you can, BUT: Don't let the unfinished work distract you. Focus on the ongoing success of keeping the little things in order. Allow yourself the little victories!





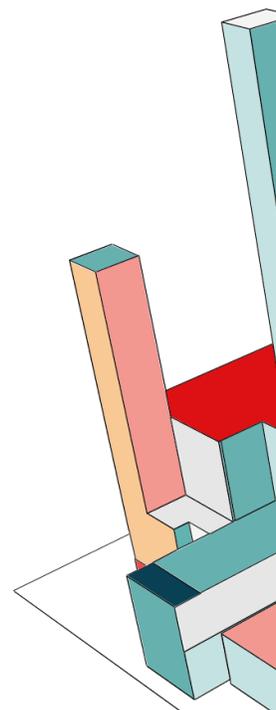
Records Management Coordinator
Library of Virginia chad.owen@lva.virginia.gov

ATTACHMENT B
PRESENTATION SLIDES:



SOURCE OF REQUESTS

- Parents may email the FERPA Officer directly
- Schools/Offices forward requests via email
- Received through Scribbles (online request system)
- FERPA Quick Reference Guide

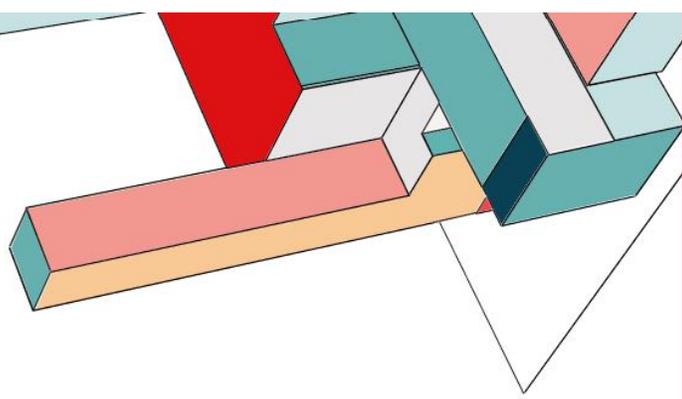


FERPA QUICK REFERENCE GUIDE

FERPA QUICK REFERENCE

Scenario	Action
Parent/guardian requests a copy of their child's educational record (full content and/or extensive request)*	Forward request to FERPAOfficer@pwcs.edu
Parent/guardian requests a copy of items within their child's educational record (i.e. transcript, immunization record, IEP - simple content, not extensive)*	Fulfill at the school site, fee collected (as deemed appropriate)
Parent/guardian requests to review/inspect their child's educational record*	School administration/staff to coordinate efforts
Student requests a copy of their educational record (i.e. transcript, immunization record, IEP – simple content (not extensive)	Parent/guardian authorization required
Guardian ad litem requests a copy of a student's educational record (Order of Appointment must be signed by a Judge) (full content and/or extensive request)	Refer to https://pwcvva.scriborder.com , 'Government Agency' icon
Guardian ad litem requests to review/inspect a student's educational record and/or a copy of items within an educational record (i.e. transcript, Report Card, IEP – simple content, not extensive) (Order of Appointment must be signed by a Judge)	School administration/staff to coordinate
Subpoena is received for witness testimony or educational records	Forward a copy of the subpoena to Risk Management immediately (extremely time sensitive)
Juvenile Justice requests copy of a student's educational record (full content and/or extensive request)	Refer to https://pwcvva.scriborder.com , 'Government Agency' icon
Juvenile Justice requests to review/inspect a student's educational record and/or a copy of items within an educational record (i.e. transcript, Report Card, IEP – simple content, not extensive)	Parent/guardian signed authorization required OR Pre-adjudication & Nondisclosure Certification required! School administration/staff to coordinate
Third-party request is received for a copy of a student's educational record	Parent/guardian signed authorization required; Forward request to FERPAOfficer@pwcs.edu
Third-party request is received to review/inspect a student's educational record	Parent/guardian signed authorization required; School administration/staff to coordinate
Request is received which references email(s) or communication(s)	Forward request to FERPAOfficer@pwcs.edu (ALL searches for email/communications under FERPA will be conducted by the FERPA Officer)

*If/when requests are received via telephone or email to deliver via the student and/or electronic formats, efforts must be made to obtain parent/guardian authorization and verify identity before releasing info.



STEPS TO FILL REQUESTS



Software

- Electronic delivery using secure SharePoint links (internal and external)
- Email searches use Microsoft Purview
- Redactions using Logikcull
- Virginia IEP to share links to available Special Education Records

4

CHALLENGES

Email maintenance

- Not typically maintained as part of the educational record
- ~~IFPA and Procedural Safeguard requirement for students with disabilities require~~ maintenance

Record Locations

- Identifying records not maintained in the student's cumulative file

Records Center Resources

- Reviewing records for compliance and redactions
- Deadlines for IEP Meetings

FERPA/VFOIA crossover

- FERPA allows fees for duplication

5

All forms and schedules, as well as additional resources, available at:

www.lva.virginia.gov/agencies/records

ATTACHMENT C
PRESENTATION CHAT:

09:59:42 From Meade Harris to Nicholas Minor(Direct Message):

1. you are muted.

10:00:04 From Nicholas Minor to Meade Harris(Direct Message):

Just testing the technology

10:00:10 From Meade Harris to Nicholas Minor(Direct Message):

do you have a sign in sheet for in person attendees?

10:04:10 From Tracey Beaver to Nicholas Minor(Direct Message):

only allowing direct messages to you or the room currently

10:05:23 From Susan Gardner to Everyone:

There you go!

10:05:34 From Pam to Everyone:

yes for me too

10:06:23 From Pam to Everyone:

Nicholas, your camera is off.

10:07:14 From Cindy to Everyone:

I think that is a good idea Nickolas.

10:07:20 From Pam to Everyone:

Seems like a good idea

10:07:27 From Susan Gardner to Everyone:

It's nice to have a reference

10:07:49 From rypkemaba to Everyone:

I appreciate the idea and having it on a shared file to see.

10:09:56 From Amy Snodgrass to Everyone:

Sounded clear

10:09:57 From Pam to Everyone:

yes

10:09:58 From Molly Shannon to Everyone:

good

10:12:15 From Pam to Everyone:

@Amy Babines I'm trying to connect with the person who oversees Student Records in your district. Can you share contact information for that person?

10:16:11 From Bliss to Everyone:

Pearl Jamison (Deputy Clerk of the School Board) and I (Student Services Department Coordinator) are from Culpeper County Public Schools. Our wifi service has been in and out today, so we currently do not have mic capabilities.

10:19:18 From Miranda Ball to Everyone:

My apologies for missing the opportunity to introduce myself. I had a phone call from a principal. I am the Executive Director of Communication and Administrative Services for Augusta County Public Schools.

11:34:54 From Tracey Beaver to Everyone:

While Chad is pulling that up - do other divisions maintain proof of residency as a registration record? As part of the shorter term record?

11:36:34 From Jean Harper-Smith to Everyone:

Frederick County - yes

11:36:50 From jtest to Everyone:

Yes, part of short term-YCSD

11:38:20 From Tracey Beaver to Nicholas Minor(Direct Message):

you might need to check Chad's connection, the screen is flashing like the connection is not stable through the hdmi cable

11:38:40 From Jean Harper-Smith to Everyone:

FCPS - we list all schools attended on the first page of the folder

11:38:55 From Charise Ward to Nicholas Minor(Direct Message):

Hey, can we check on the powepoint? Its still doing a lot of flashing.

11:38:55 From Jean Harper-Smith to Everyone:

Dates are listed as well

11:40:19 From Jean Harper-Smith to Everyone:

We scan that and is kept long term

11:40:59 From jtest to Everyone:

I keep all the withdrawal/reg forms scanned long term-YCSD

11:41:51 From Pam to Everyone:

Thanks, Chad!

11:41:56 From Molly Shannon to Everyone:

Thank you!

11:42:06 From Jean Harper-Smith to Everyone:

Thanks Chad

11:42:07 From Charise Ward to Everyone:

THANK YOU CHAD!!

11:42:07 From Pam to Everyone:

Will this slide deck be added to our PSRC site?

11:49:21 From Tracey Beaver to Nicholas Minor(Direct Message):

I have to be at KLC at 1pm - didn't realize it was back to back so I may have to cut out about 10-15 minutes before the end of this meeting.

11:49:35 From Rachel Johnson, LCPS to Everyone:

Is someone speaking?

11:49:45 From Rachel Johnson, LCPS to Everyone:

Because I don't hear anyone :)

11:50:10 From Tracey Beaver to Everyone:

Hi Rachel, we are currently on a break, but Pam and I will be talking about our FERPA processes once the break is over

11:55:36 From Cindy to Everyone:

Tracey Roanoke County Schools destroys Transfer info no longer educationally relevant. We also document on the back of the cumulative folder what schools the student attended TO and FROM

11:58:18 From Nicholas Minor to Pam(Direct Message):

Just made you a cohost, so you can share you screen if needed.

11:58:28 From Nicholas Minor to Tracey Beaver(Direct Message):

Just made you a cohost, so you can share you screen if needed.

11:59:45 From Pam to Nicholas Minor(Direct Message):

thanks and yes, I plan to screen share

12:00:40 From Tracey Beaver to Nicholas Minor(Direct Message):

Reacted to "Just made you a coho..." with 

12:00:49 From Rachel Johnson, LCPS to Everyone:

Reacted to "Hi Rachel, we are cu..." with 

12:03:29 From Chad Owen to Everyone:

Hey there Pam, now logged in myself - I think the easy thing would be to save this as a PDF and put it up on PSRC's site, but I can do that, no problem.

12:04:08 From Susan Gardner to Everyone:

Are you willing to share the document with us for possible adaption/use in our divisions?

12:04:46 From Chad Owen to Everyone:

Susan, absolutely. Everything I do is for-hire for the Commonwealth anyway, so it's not like I copyright these things or the like!

12:12:03 From Amy Snodgrass to Everyone:

can you go back to the bottom and the flow chart so I can see that

12:14:10 From Jean Harper-Smith to Everyone:

This information is great. I have to leave for another meeting but would appreciate access to this document.

12:14:14 From jtest to Everyone:

How do you store recorded IEP meetings saved on thumb drives?

12:15:26 From Tracey Beaver to Everyone:

We ask the school to save them in a SharePoint drive so that we can share them with the parent. I have seen schools tape the thumb drive to the inside of the Special Ed folder

12:16:25 From Chad Owen to Everyone:

Nothing like an 1824 solution to a 2024 problem! :D

12:17:00 From Tracey Beaver to Everyone:

Reacted to "Nothing like an 1824..." with 😂

12:17:05 From jtest to Everyone:

Reacted to "Nothing like an 1824..." with 😂

12:17:19 From Susan Gardner to Everyone:

Thank you so much for sharing!

12:17:28 From Charise Ward to Everyone:

Reacted to "Nothing like an 1824..." with 😂

12:18:04 From Molly Shannon to Everyone:



12:18:15 From Meade Harris to Nicholas Minor(Direct Message):

Send to me and I can include with the meeting notes for this meeting. Unless you want to go straight to the PSRC site

12:30:36 From Pam to Nicholas Minor(Direct Message):

We have Title IX in Guardian and Threat Assessments in a system called Navigate360

12:30:52 From Pam to Everyone:

We have Title IX in Guardian and Threat Assessments in a system called Navigate360

12:32:05 From Pam to Everyone:

YES, YES, YES!!!

12:34:18 From Charise Ward to Everyone:

THANK YOU PAM AND TRACEY!!

12:39:20 From Pam to Everyone:

Yes, we do the same!!!!

12:41:43 From Tracey Beaver to Everyone:

Thanks, everyone. I have to jump off to run to another meeting.

12:45:42 From Pam to Everyone:

I vote for 4 meetings

12:46:07 From Molly Shannon to Everyone:

September is tough

12:46:41 From Amy Snodgrass to Everyone:

I agree with 4

12:46:51 From 0910981 to Everyone:

Reacted to "I agree with 4" with 

12:47:38 From Cindy to Everyone:

Reacted to "I agree with 4" with 

12:47:43 From Molly Shannon to Everyone:

Reacted to "I agree with 4" with 

12:49:56 From Chad Owen to Everyone:

Cindy, if you don't get enough responses here, you can always throw it out on the EDSIG listserv.

12:53:56 From Cindy to Everyone:

Thank you

12:54:43 From Cindy to Everyone:

Reacted to "Cindy, if you don't ..." with 

12:55:30 From Cindy to Everyone:

Thank you everyone