

RECORDS RETENTION & DISPOSAL FOR SCHOOL DISTRICT OPERATIONS: FROM COMPLIANCE TO PRACTICAL IMPLEMENTATION

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INTRODUCTIONS

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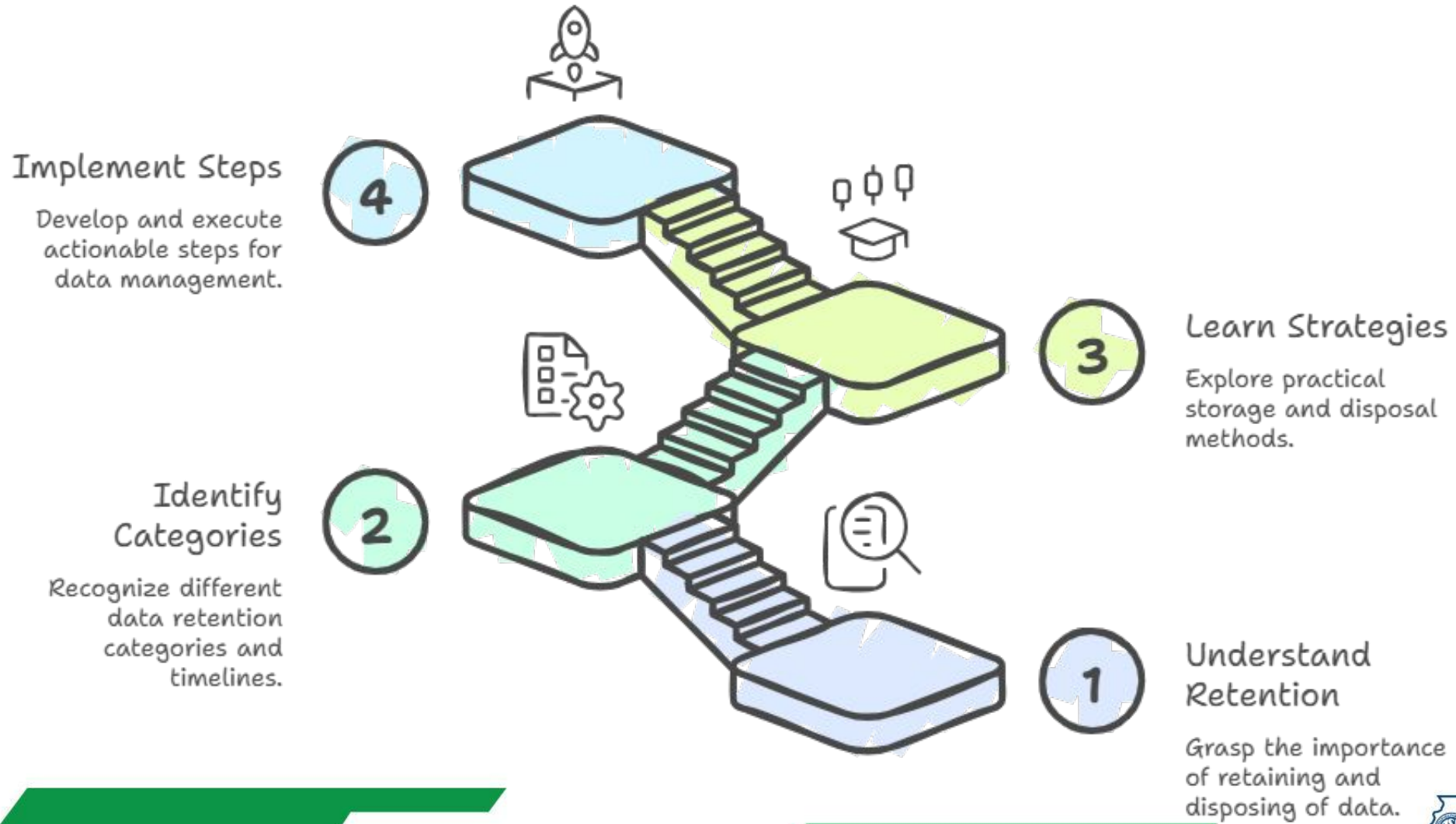
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SESSION OBJECTIVES



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WHY RECORDS RETENTION MATTERS IN OPERATIONS

A risk management function, not just clerical work



Regulatory and audit requirements



Liability protection and litigation readiness



Operational continuity and institutional memory



Financial accountability and grant compliance



Public transparency and FOIA considerations

Any success or horror stories to share?

RECORDS CATEGORIES IN SCHOOL DISTRICT OPERATIONS



Capital & Construction

Records related to capital investments and construction projects.



Facilities & Maintenance

Records concerning the upkeep and management of facilities.



Safety & Compliance

Records ensuring adherence to safety regulations and compliance standards.



Financial & Contractual

Records detailing financial transactions and contractual agreements.



Transportation & Operations

Records related to transportation logistics and operational efficiency.

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RECORDS CATEGORIES IN SCHOOL DISTRICT OPERATIONS

Capital & Construction Records



 Construction documents

 As-built drawings

 Specifications

 Warranties

 Commissioning reports

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RECORDS CATEGORIES IN SCHOOL DISTRICT OPERATIONS

Facilities & Maintenance Records



Preventive Maintenance

Work Orders

Inspection Reports

Equipment Service History & Warranties

Site / Grounds Documentations

RECORDS CATEGORIES IN SCHOOL DISTRICT OPERATIONS

Understanding Retention Requirements



State Records Schedules

Local Records Act (LRA) and Secretary of State guidelines.

Local District Policies

Board-approved protocols and administrative procedures.

Federal Regulations

OSHA requirements, FERPA, and IDEA mandates.

Legal & Risk Guidance

Insurance counsel and litigation hold requirements.

Golden Rule of Retention

The strictest applicable requirement (state, federal, or local) should always guide retention decisions.

RECORDS CATEGORIES IN SCHOOL DISTRICT OPERATIONS

Safety & Compliance Ecosystem



Environmental & Life Safety

AHERA/Asbestos, Fire Inspections, Environmental testing, and Life Safety Surveys.

Operational Compliance

OSHA documentation, Playground inspections, and Construction documents.

Student & Personnel

Permanent Student Records and Employee Discipline documentation.

Fiscal & Contractual

Successful Bids, Purchase Orders, and Formal Contracts.

Compliance Mission

Ensuring a safe, transparent, and legally sound environment for every student and staff member through meticulous record-keeping.

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RECORDS CATEGORIES IN SCHOOL DISTRICT OPERATIONS

Safety & Compliance Retention Summary

Record Type	Retention Period	Source Basis
Permanent Student Records (ID, Transcripts)	60 Years	105 ILCS 10/4(e)
Temporary Student Records (Discipline)	5 Years after leaving	105 ILCS 10/4(f)
Special Education Files	27 Years after birth	23 Ill. Admin. Code 375
Lawsuit Records	3 Years after settlement	General Practice
Annual Financial Reports	7 Years	Local Records Act

RECORDS CATEGORIES IN SCHOOL DISTRICT OPERATIONS

Safety & Compliance Retention Summary

Record Type	Retention Period	Source Basis
Asbestos Management Plan (AHERA)	Life of Building	IDPH / AHERA Requirement
Inspections (all general)	Life of Building	Health & Life Safety Code
OSHA 300 Logs	5 Years	IL OSHA / IDOL
Successful Bids	10 Years	Contractual / Audit Standard
Fire Inspections	10 Years+	OSFM / Risk Management

RECORDS CATEGORIES IN SCHOOL DISTRICT OPERATIONS

Operations & Maintenance Retention Summary

Inspection Type	Minimum Retention	Recommended (Risk Mgmt)
Routine Playground Logs	2 Years	5 Years
Annual Playground Audits	5 Years	15 Years (Statute of Repose)
Professional Bleacher Certs	2 Years	10 Years
Fire Drill Logs	3 Years	3 Years
General Life Safety Reports	10 Years	Permanent (recommended)

RECORDS CATEGORIES IN SCHOOL DISTRICT OPERATIONS

Financial & Contractual Retention Summary

Record Type	Retention Period	Source Basis
Vendor Contracts	10 Years after expiry	Local Records Act
Purchase Orders	7 Years	Audit Requirements
Invoices & Receipts	7 Years	IRS / State Guidelines
Bids & RFPs	10 Years	Procurement Policy

Construction Plans

Life of Building

Health & Life Safety Code

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RECORDS CATEGORIES IN SCHOOL DISTRICT OPERATIONS

Transportation & Operations Records



Fleet Maintenance

Fuel Logs

Route Documentation

Incident Reports

Reporting



UNDERSTANDING RETENTION REQUIREMENTS

WHERE REQUIREMENTS COME FROM

- State records retention schedules
- Local district policies
- Federal regulations
- Insurance and risk management guidance
- Legal counsel recommendations
- Industry best practices

KEY PRINCIPLE

The strictest applicable requirement should guide retention.

CONSEQUENCES

Over-retention: Storage costs, discovery risk

Under-retention: Compliance violations

STRATEGY

Retention is a balance of

COMPLIANCE
&
RISK

“KEEP FOREVER” vs. TIMED RETENTION vs. DISPOSABLE

A Simple Decision Framework

KEEP FOREVER

- As-built drawings and major renovation documents
- Property records and deeds
- Environmental remediation documentation
- Long-term warranties
- Board-approved contracts with lasting obligations

TIMED RETENTION

- Work orders (often 3–7 years)
- Maintenance logs (varies by equipment)
- Bid documents (varies by state)
- Inspection reports (varies by regulation)
- Financial transactions (audit cycles)

DISPOSABLE

- Duplicate copies
- Draft documents
- Transitory communications
- Routine scheduling emails
- Outdated reference materials

Decision Tree: Regulatory Requirement → Legal Risk → Operational Value → Storage Cost

PAPER vs. DIGITAL vs. HYBRID

Pros and Cons to Storage Options

Paper Storage

- Limited access based on location of storage
- On-Site storage security
- No searching capability
- No up front cost, costly to lose documents down the line?
- Quality fades over time
- Use file cabinets for each building
- How to recover lost or damaged documents?



PAPER vs. DIGITAL vs. HYBRID

Pros and Cons to Storage Options

Digital Storage

- Accessible anywhere with wifi
- Secure Cloud Storage
- Search or filter for what you need in seconds
- No worry of document quality fading
- Inspections on hand / audit ready
- Every document in one central location
- Weekly Back-Ups

SCHOOL	Actions	DocName	RevDate	Description	Discipline	DocType	Project	Facility
Search Folders			yyyy-mm-dd					
CONSTRUCTION PROJECTS								
1966 NEW CONSTRUCTION								
1979 ADDITION								
1994 MECHANICAL UNIT REPLACEMENT								
1997 TECHNOLOGY WIRING								
2000 ADDITION								
2009 SAFETY REFERENCE PLAN								
2010 DOOR REPLACEMENTS								
2011 FACIA AND SOFFIT REPLACEMENT								
2011 WINDOW REPLACEMENTS								
2012 RENOVATIONS								
2013 CIVIL PROJECT								
2013 MECHANICAL AND ELECTRICAL WORK								
2013 RENOVATIONS								
2013 WINDOWS REPLACEMENTS								
2017 DOOR REPLACEMENTS PROJECT								
2017 FIRE ALARM UPGRADES								
2017 SITE IMPROVEMENTS								
2019 INTERIOR BUILDOUT AND ADDITION								
2025 HEALTH AND LIFE SAFETY IMPROVEMENTS								
2025 HLS AND COOLING IMPROVEMENTS								

	DocName	RevDate	Description	Discipline	DocType	Project	Facility
	_COVER	2024-10-16	TITLE PAGE	GENERAL	SPECIFICATION	2025 HEALTH AND LIFE SAFETY IMPROVEMENTS	COVENTRY ELEMENTARY SCHOOL
	_COVER	2024-12-11	TITLE PAGE	GENERAL	SPECIFICATION	2025 HLS AND COOLING IMPROVEMENTS	COVENTRY ELEMENTARY SCHOOL
	_COVER	2019-02-25	TITLE PAGE	GENERAL	ADDENDA	2019 INTERIOR BUILDOUT AND ADDITION	COVENTRY ELEMENTARY SCHOOL
	_COVER	2017-02-06	TITLE PAGE	GENERAL	SPECIFICATION	2017 FIRE ALARM UPGRADES	COVENTRY ELEMENTARY SCHOOL
	_COVER	2017-02-06	TITLE PAGE	GENERAL	SPECIFICATION	2017 DOOR REPLACEMENTS PROJECT	COVENTRY ELEMENTARY SCHOOL
	_COVER	2012-02-07	TITLE PAGE	GENERAL	SPECIFICATION	2012 RENOVATIONS	COVENTRY ELEMENTARY SCHOOL
	_COVER	2019-03-22	TITLE PAGE	GENERAL	SPECIFICATION	2019 INTERIOR BUILDOUT AND ADDITION	COVENTRY ELEMENTARY SCHOOL
	_COVER	2017-03-09	TITLE PAGE	GENERAL	PLAN	2017 SITE IMPROVEMENTS	COVENTRY ELEMENTARY SCHOOL
	_G0.1	2011-03-17	TITLE SHEET	GENERAL	PLAN	2011 FACIA AND SOFFIT REPLACEMENT	COVENTRY ELEMENTARY SCHOOL
	_G0.2	2011-03-17	GENERAL NOTES, ABBREVIATIONS, AND SYMBOLS LEGEND	GENERAL	PLAN	2011 FACIA AND SOFFIT REPLACEMENT	COVENTRY ELEMENTARY SCHOOL

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PAPER vs. DIGITAL vs. HYBRID

Pros and Cons to Storage Options

Hybrid Storage

- “Some stuff is over here, some stuff is over there”
- Personal drive organization
- No searching capability
- Quality fades over time
- Using folder structures to “search”
- Digital mess can take just as long as a paper mess



DISPOSAL PROCEDURES & RISK MITIGATION

Disposal must be:

- Intentional
- Documented
- Consistent
- Authorized

Topics:

- Approved destruction schedules
- Litigation holds
- Secure destruction methods
- Documentation of disposal actions
- Chain of custody for sensitive records

Key Principle

“If you can’t prove you followed policy, you didn’t.”

BUILDING A PRACTICAL RECORDS MANAGEMENT PROGRAM



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COMMON MISTAKES & LESSONS LEARNED

Case Study / Scenario Discussion

Common Pitfalls & Mistakes

- Saving everything forever
- Department silos
- Personal drives and email storage
- No ownership or accountability
- Lack of documentation for disposal
- Ignoring legacy paper archives

Example Scenarios

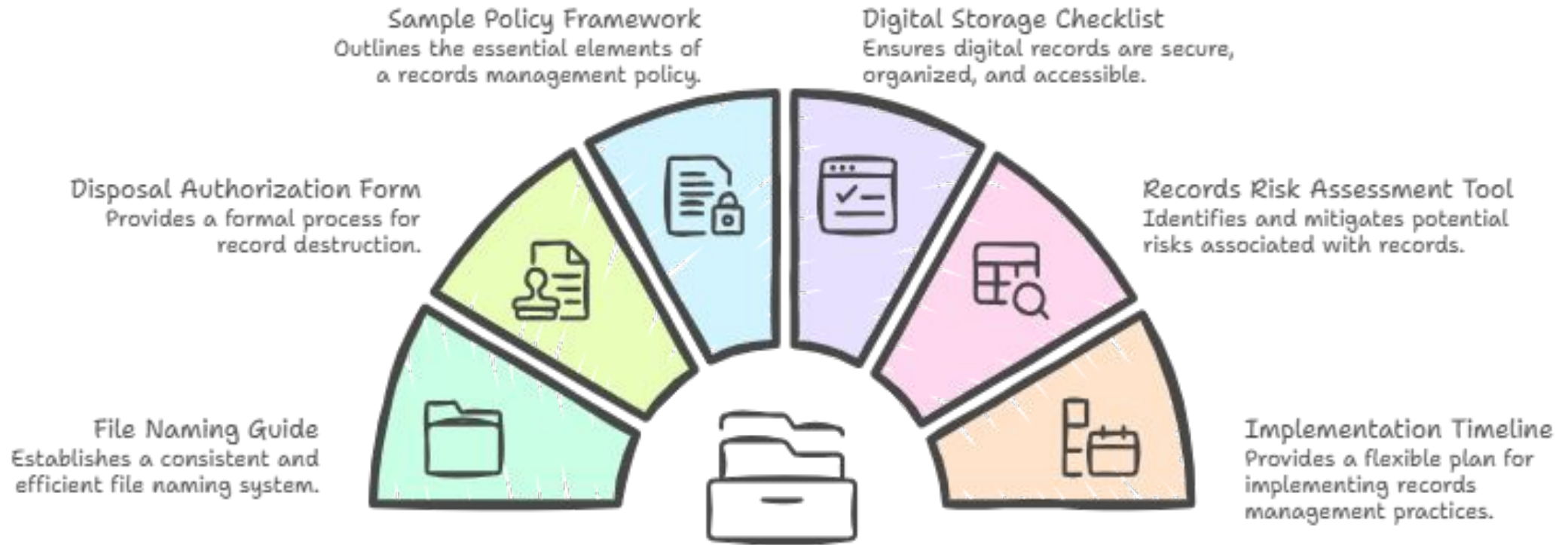
- Construction litigation 12 years after project completion
- Equipment failure investigation
- FOIA request for maintenance history
- Insurance claim after facility damage

Discussion Question:

“What records would you need?”

TOOLS, TEMPLATES & RESOURCES

Records Management Framework



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BEFORE



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AFTER



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Questions and Answers

We thank you for your time!

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