

REQUEST FOR RECORDS RETENTION SCHEDULE
To be Submitted to the Records Management Division
Hall of Records Commission

1. Requesting Agency: DEPARTMENT OF EDUCATION
2. Division or Bureau of Requesting Agency: DIVISION OF ADMINISTRATION, FINANCE, AND RESEARCH

3. Authorization Requested (Check only one of the squares below).

A Dispose of present accumulation. No additional accumulation is anticipated. Records have ceased to have value to warrant retention.

B Establish retention schedule for records for which there is a continuing accumulation. The records will cease to have value to warrant their retention after the period of time indicated.

C Microfilm and destroy originals. Originals if not microfilmed would be retained for the period of time indicated.

4. Item No. 5. Description of Records: Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.
6. Recommendation of Hall of Records and Board of Public Works.

1. FEDERAL IMPACT FILE (PUBLIC LAWS 815 and 874 - FEDERAL AID TO AREAS AFFECTED BY FEDERAL ACTIVITIES).

Size: 8 1/2" x 11"
Dates: 1950 - -
Quantity: Office, 1 drawer (1956 - -)
 Storeroom, 1 transfile (total 4 cubic feet)
File Arrangement: By year and by county
Disposable Amount: 2 cubic feet

This file is concerned with the supervision of Federal aid to counties for school construction or for current educational expenses. Counties apply for aid through the Department of Education which checks and forwards the applications to the Office of Education, Department of Health, Education and Welfare, the responsible Federal agency. Construction grants are made in accordance with the provisions of Public Law 815 and grants for current expense in accordance with the provisions of Public Law 874. The majority of the file consists of information copies of correspondence or other forms prepared or received by the counties.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

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7. Agency, Division or Bureau Representative

[Signature] State Superintendent of Schools April 14, 1959
Signature Title Date

Schedule Authorized as Indicated in Col. 6 by Hall of Records Commission.

Disposal Authorized as Indicated in Col. 6 by Board of Public Works.

4/29/59
Date
[Signature]
Archivist

MAY 4 1959
Date
[Signature]
Secretary

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5. Description of Records

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Item No.

2. PRINCIPAL'S REPORTS

Size: 8 1/2" x 11"
Dates: 1958 - -
Quantity: Office, 1 drawer (1 cubic foot)
File Arrangement: By county and by district therein

Principal's Reports outline the school's program of studies and statistical information (enrollment and distribution of enrollment among various courses or programs). The Weekly Assignment of Professional Staff Report (F & R 9/57) is filed with the Principal's Reports.

RECOMMENDATION: RETAIN FOR TWO YEARS. THEN TRANSFER TO THE DIVISION OF INSTRUCTION.

3. ENROLLMENT BY GRADE REPORTS

Form No.: F & R 12/52
Size: 8 1/2" x 11"
Dates: 1955 - -
Quantity: Storeroom, 1 cubic foot
File Arrangement: Chronological
Disposable Amount: 1 cubic foot

These reports are prepared by county school superintendents to summarize enrollment by grade, color, and sex as of a particular date. Specific information shown includes the date, the name of the county, the total elementary school enrollment (with separate breakdown as to numbers of white and colored boys and girls), and the total junior and senior high school enrollment (with breakdown as to color). A summary of the information in these reports appears in the Department's printed annual report.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

4. TRANSPORTATION FILE

Size: 8 1/2" x 11"
Dates: 1951 - -
Quantity: 1 1/2 drawers, 4 transfiles (total 11 cubic feet)
File Arrangement: By county
Annual Accumulation: 1 cubic foot (est.)
Audit: State

This file is concerned with negotiating contracts for public school bus transportation and making cost estimates and disbursing funds to carry out the program. The file contains the following records pertaining to school bus transportation in each county:

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6. Recommendation of Hall of Records and Board of Public Works.

- Lists of contractors and drivers of public school buses
- A & F 9/55 Summary of Estimated Cost of Transporting Public School Pupils at Public Expense - with detailed attachments
- T6 - A & F&R-4/58 Summary of Actual Expenditures for Pupil Transportation
- Correspondence
- T-1 A&F 8-57 Request for Approval of Change in Public School Transportation Contract

RECOMMENDATION: RETAIN FOR FIVE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.

5. IBM TABULATING CARDS

- Size: IBM card size
- Dates: 1952 - -
- Quantity: 90 boxes (est.) - 23 cubic feet
- File Arrangement: By category and chronological therein by year
- Annual Accumulation: 23 boxes (est.) - 6 cubic feet
- Disposable Amount: 19 boxes - 5 cubic feet

IBM tabulating cards are used by the Department for statistical and reporting purposes. Cards are prepared and used specifically for the following purposes:

- State Aid - for the computation and reporting of State payments to the counties
- Handicapped cases - for statistics on handicapped children
- Rehabilitation - for statistics on rehabilitation cases
- Teacher Certification - for statistics on qualifications of individual teachers.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

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6. STATE AID FILE

- Size: 8 1/2" x 11"
- Dates: 1945 - -
- Quantity: Office, 1 drawer (1957 - -); Storeroom, 1 cubic foot; (total, 3 cubic feet)
- File Arrangement: By year and therein by name of county
- Annual Accumulation: 2 cubic feet (est.)
- Audit: State

This file relates to the administration of State aid to counties, the formulation of the Department's budget, and disbursements for aid to education. Specifically, the file contains the following categories of records:

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State aid folders - one for each county containing forms which show the calculations of State aid, assessed county valuations (county funds for current expenses), statements of distribution of State aid as to type (aid per pupil, aid per classroom, equalization, part payment of salaries); also included are breakdowns of average school enrollment.

State budget data folders - one for each county containing forms received from counties on handicapped children and pupil transportation cost; worksheets; and breakdowns on enrollment and the number of principals and teachers in each school.

Records supporting disbursements for aid to education (transmittals).

RECOMMENDATION: RETAIN FOR THREE YEARS, OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.

7. GENERAL CORRESPONDENCE

Size: 8 1/2" x 11"
Dates: 1922 - -
Quantity: 6 1/2 drawers
File Arrangement: Alphabetical by name or subject
Annual Accumulation: 1 cubic foot (est.)

This file is maintained for both informational and administrative purposes. Informational material consists of printed or mimeographed items which relate to various educational subjects of interest to the Department as well as correspondence concerned with the collection of this material. Correspondence and other records concerned with general administration are also filed--particularly correspondence with other State agencies and copies of opinions of the Attorney General.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

8. CORRESPONDENCE--COUNTY

Size: 8 1/2" x 11"
Dates: 1948 - -
Quantity: 1 drawer
File Arrangement: By county

This file contains correspondence with county boards of education. It relates primarily to county requests for general information from the State Department.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

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9. PUBLIC JUNIOR COLLEGE AND TEACHER COLLEGE FILE

Size: 8½" x 11"
Dates: 1946 - -
Quantity: 1 drawer (1958 - -)
File Arrangement: Alphabetical by name of college
Annual Accumulation: 1 cubic foot (est.)
Audit: State

This file contains college reports from which the Department extracts statistical information and calculates the State-aid payments which are due the various colleges. Specific reports and other records contained in the file are listed below:

- TC 2 A&F 10/55 Teacher Training and Junior College Enrollment by County-Class
- TC 4 A&F 10/55 Distribution of College Freshmen (as to county, name of high school, year of graduation from high school, and numbers of men and women)
- TC 1 A&F 10/56 Enrollment Data - showing distribution among various programs
- JC-1 A&F 10/57 Certification of Maryland Students for State Aid
Statements of State aid payment to junior colleges
Transmittal letters

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.

10. STATE AID FOR PUBLIC LIBRARIES FILE

Form No.: A F&R 4/58
Size: 8½" x 11"
Dates: 1945 - -
Quantity: ½ drawer (1 cubic foot)
File Arrangement: By year and by county therein
Annual Accumulation: ½ cubic foot (est.)
Audit: State

This file contains correspondence and county certifications of the amounts of local library levies.

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11. SUMMARY OF ENROLLMENT, ATTENDANCE, AND PROMOTION (ATTENDANCE SUMMARIES)

Form No.: A&F - 9/55
Size: 8 1/2" x 11"
Dates: 1955 - -
Quantity: 1 cubic foot
File Arrangement: By year and by county

Counties summarize school enrollment, attendance, and promotions on this series of forms. The face sheet (A&F-9/55) shows the inclusive years covered by the report, the name of the county, the name of the principal, the school number, school district, name of school, the date of the report, and the signature of the person submitting the report. Attached forms give a breakdown on enrollment, late entrants, permanent withdrawals, withdrawals who re-entered, annual attendance averages, attendance by month, transportation, promotions and non-promotions, and pupils not promoted (by cause). The record copy is retained at county level. The Department uses this copy when compiling the State Summary Book.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

12. MONTHLY ATTENDANCE REPORTS

Form No.: A, F, & R 9/58
Size: 8 1/2" x 11"
Dates: 1956 - -
Quantity: 1 cubic foot
File Arrangement: By year and by county
Audit: State

A single-sheet monthly report is prepared by each county for State aid purposes. The form lists the month, the name of the county, the type of school and the average number of students attending, belonging, and the per cent of attendance; the county grand total; the date on which the report was prepared; and the signature of the superintendent of schools.

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13. SUPERINTENDENTS' BUDGETS

Size: 7" x 10"
Dates:
Quantity: 1/2 drawer (1959 - -)
File Arrangement: By year and by name of county
Annual Accumulation: 1 drawer (est.)

County school budgets are submitted annually by the Boards of Education to the Boards of County Commissioners. The budget, prepared

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STATE OF CALIFORNIA
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in printed booklet form, itemizes requirements for current expense, capital outlay, and debt service. Estimated amounts to be received from the State and from other sources, and the amounts that will be needed from county sources are also listed. A copy of the budget is retained by the Department in this file for use in making estimates on current school finances.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

14. TEST RESULTS FILE

Size: 8 1/2" x 11"
Dates: 1952-1954
Quantity: 2 drawers (4 cubic feet)
File Arrangement: By county and therein by school
Annual Accumulation: Discontinued
Disposable Amount: 2 cubic feet

Achievement tests were administered by various schools throughout the State and the Department extracted desired information from a breakdown of the test results. The test results (California Achievement Test) were reported by each school on the following forms:

R1-F&R-11-52-K Raw Scores
T2-F&R-11/52 Total Mental Factors
T3-F&R-11/52 Chronological Ages of Pupils Tested

RECOMMENDATION: DESTROY ACCUMULATION.

15. CENSUS REPORTS

Form No.: Census Form 2
Size: 11" x 18"
Dates: 1938-1950
Quantity: Storeroom, 1 cubic foot
File Arrangement: Chronological
Annual Accumulation: Discontinued
Disposable Amount: 1 cubic foot

This file consists of census reports prepared by counties throughout the State. The census figures are listed on a form titled District Summary Sheet--School Census--(year). The form shows the name of the county, the nearest post office, the designation of the election district, the name of the school principal, and the number of children under age 21 who are students or non-school attendants. A further breakdown of information in this last category gives detail on student sex, public and non-public school attendance, and the number of handicapped and non-handicapped non-school attenders.

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The Census Reports were the basis for Department census summaries in the printed annual report.

RECOMMENDATION: DESTROY ACCUMULATION.

16. AGE-GRADE STUDIES

Size: 8½" x 11"
Dates: 1947-1951
Quantity: Storeroom, 1 cubic foot
File Arrangement: By county
Annual Accumulation: Discontinued

This file contains county-prepared age-grade studies used by the Department as an aid to the preparation of summaries on a State-wide basis. The county studies show the ages of children in various grade levels, thus pointing up problems of over or under-ageness. Answers to a questionnaire concerned with the value or use of the age-grade studies are included in the file. Such studies were discontinued in 1951.

RECOMMENDATION: DESTROY ACCUMULATION.

17. LEAVE RECORDS

Form No.: SEC 128-A
Dates: 1952 - -
Audit: State

This file consisting of leave records for all employees of the Department of Education includes:

Leave Record Card - Form SEC 128-A, a standard State-wide form prepared annually for each employee
Leave applications
Doctors' certificates

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.

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