



THOMAS ANDERSON
SUPERINTENDENT

NEW BEDFORD PUBLIC SCHOOLS
PAUL RODRIGUES ADMINISTRATION BUILDING
455 COUNTY STREET
NEW BEDFORD, MASSACHUSETTS 02740
www.newbedfordschools.org

(508) 997-4511

*"We are committed to developing a community of learners
Who are academically proficient, demonstrate strong character
and exhibit self-confidence."*

KAREN A. TREADUP
DEPUTY SUPERINTENDENT

ANDREW O'LEARY
ASSISTANT
SUPERINTENDENT OF
FINANCE & OPERATIONS

HEATHER EMSLEY
EXECUTIVE DIRECTOR OF
HUMAN CAPITAL SERVICES

JENNIFER FERLAND
EXECUTIVE DIRECTOR OF
STRATEGIC INITIATIVES & PARTNERSHIPS

MATTHEW KRAVITZ
EXECUTIVE DIRECTOR OF
SPECIAL EDUCATION & STUDENT
SERVICES

SONIA WALMSLEY Ph.D
EXECUTIVE DIRECTOR OF
EDUCATIONAL ACCESS & PATHWAYS

MEMORANDUM

To: Department Heads, Principals, Directors, Coordinators, and Supervisors
From: Andrew O'Leary, Assistant Superintendent of Finance & Operations
Date: January 21, 2022
Subject: Shredding Instructions

Shredding must be approved by Finance & Operations.

STEP 1:

- Submit a **Shred Request Form** to Finance & Operations for approval. This fillable form is available on the NBPS website under *Departments/Programs > Finance and Operations > Useful Forms*.
- The **Shred Request Form** must be fully executed and you must attach a printout of the corresponding State Schedule/ Regulation
- To get the State Series #, review the **School District/Department Records Retention** and the **Executive Office of Education/All Schools** documents (attached hereto) and print out the appropriate page. If you cannot find the appropriate State Series # on these documents, visit the two links below:
 1. <http://retweb.sec.state.ma.us/retweb/retention/schedules.asp>
Municipal Records Retention Schedule > School Department OR Records in Common Statewide Agency Schedule > Executive Office of Education > All Schools
 2. <http://www.doe.mass.edu/lawsregs/603cmr23.html?section=06>
DESE Education Laws & Regulations > 23.06 Destruction of Student Records
- Finance & Operations will provide you with a copy of the approved Shred Request Form.

If you wish to request shredding services, move on to STEPS 2 & 3:

STEP 2:

- Solicit a quote from Mansfield Shredding (Vendor #3087) via mansfieldoffice@comcast.net.
- Submit a Requisition to Finance & Ops. For Account. #. Use your "Other Expenditures" service line.

STEP 3:

- Once the Purchase Order is generated, Finance & Operations will schedule a pick-up with Mansfield Shredding and will email you the pick-up date. Make the appropriate preparations for pick-up.

NEW BEDFORD PUBLIC SCHOOLS
SHRED REQUEST FORM

To: Andrew B. O'Leary, Assistant Superintendent of Finance & Operations

Date: _____

From: (Name & Title) _____

Department/School: _____

In adherence to Massachusetts Records Law, I declare and submit the following items for shredding:

State Series / Regulation #	Description of Shred Documents	Document Years	Location of Shred Box(es)

Total # of Shred Boxes Submitted: _____

Submitted by:

Approved by:

Signature of Dept./School Representative

Signature of Asst. Supt. of Finance & Operations

School District/Department Records Retention

revised 2011

Secretary of the Commonwealth/Supervisor of Public Records/Records Management Section/Records Retention Schedule

Series name	Years To Keep	Disposition period	hard copy?	Series number	Legal citation
-------------	---------------	--------------------	------------	---------------	----------------

ADMINISTRATION

Annual Notice to Public	1	After use.	No	20.001	c.98 s.41
Annual Report of School Committee	100	Permanent (one mint copy).	Yes	20.11	c.72 s.2
Annual Report of School Condition	7	7 years	No	20.12	C.72 s.4
Annual Report of School Returns	100	Permanent (one mint copy).	No	20.13	c.72 s.3
Annual Report of Superintendent of Schools	100	Permanent (one mint copy).	Yes	20.14	c.72 s.2(A)
Correspondence	3	3 years if no informational or evidential value.	No	20.20	
Extended School Year Plan Records	3	3 years.	No	20.40	c.71 s.1, 603 CMR 16.00
Insurance Policies	7	7 years after expiration.	No	20.50	
Minutes of School Committee Meetings	100	Permanent.	Yes	20.60	
Open Meeting Law - Agendas	1	After use.	Yes	1.073	c.30A s.18-25
Open Meeting Law - Meeting Notices	1	After use.	Yes	1.075	c.30A s.18-25
Open Meeting Law - Notice to Individual	6	After use.	Yes	1.076	c.30A s.18-25
Open Meeting Law - Complaints	3	After use.	Yes	1.078	c.30A s.18-25
Printing Request Form	2	After completion of satisfactory audit.	No	20.9	
Regional District Planning Board Agreements	100	Permanent (one mint copy).	Yes	20.10	C.71S.2
Teaching Credentials Evidence	5	5 years after termination of employment.	No	20.30	603 CMR 7.00
Teaching Schedules	2	After use.	No	20.15	

FISCAL

Accounts Payable	2	After completion of satisfactory audit.	No	20.16	
Accounts Receivable	2	After completion of satisfactory audit.	No	20.17	
Annual Audit of Accounts	7	7 years.	No	20.18	c.71 S.16E
Bank Statements	2	After completion of satisfactory audit. (BHRSD maintain	No	20.19	
Bid Specifications and Responses	2	File with Contract Files, see 20.30 for retention period.	No	20.20	C.30B, c.260 s.2
Bills Outstanding, Statements of	2	After completion of satisfactory audit and settlement of l	No	20.21	C.41 s.58
Bond Coupon Statements	2	After completion of satisfactory audit.	No	20.23	
Bond Coupons	7	7 years after cancellation, provided a satisfactory audit ha	No	20.22	
Budget Estimates	2	After use.	No	20.24	
Bus Contracts	2	File with Contract Files, see 20.30 for retention period.	No	20.25	C.30B
Bus Transportation Requests	2	After completion of satisfactory audit.	No	20.26	
Bus Vouchers	7	7 years provided a satisfactory audit has been completed.	No	20.27	
Check Register	2	After completion of satisfactory audit. (BHRSD maintai	No	20.29	
Checks, Accounts Payable, Cancelled	7	7 years, provided a satisfactory audit	No	20.28	c.41 s.35

School District/Department Records Retention

revised 2011

Secretary of the Commonwealth/Supervisor of Public Records/Records Management Section/Records Retention Schedule

Series name	Years To Keep	Disposition period	hard copy?	Series number	Legal citation
Contracts	7	7 years after termination except contracts under seal, then 21 years following termination; unless retained by central purchasing officer, then after termination of contract.	No	20.30	C.30B, c.260 ss.1, 2
Educational Television Program Fund	2	After completion of satisfactory audit.	No	20.31	C.71 S.13(H)
Equipment Inventory Form	5	5 years after retirement of equipment.	No	20.32	
Federal Projects (Title 1, 11, III, IV-B, etc.)	5	5 years provided a satisfactory audit has been completed. (BHRSD maintains 7 years.)	No	20.33	
Invoices	7	7 years after completion of satisfactory audit. 1 year if record copy is kept centrally; e.g., by municipal accountant/auditor.	No	20.35	
Ledger, Agency and Trust Accounts	100	Permanent.	No	20.37	
Purchase Orders	7	File With Contract Files, see. 20.30 for retention period.	No	20.40	C.30B
Purchase Requisitions	4	4 years. If record copy is kept centrally e.g. by Purchasing Dept, Accountant/Auditor, etc., after use.	No	20.41	
Receipts, Daily	2	After completion of satisfactory audit.	No	20.42	c.41 s.35
Receipts, Schedule of	2	After completion of satisfactory audit.	No	20.43	c.41 SS.35, 50
Reimbursement Claims	7	7 years, provided a satisfactory audit has been completed	No	20.44	
School Aid Records	2	After completion of satisfactory audit.	No	20.45	603 CMR 10.03-10.19
Supporting Cost, Allocation and Computation	2	After completion of satisfactory audit,	No	20.46	
Warrants Invoices	2	After completion of satisfactory audit.	No	20.36	

FOOD SERVICE

Breakfast Program Records	3	3 years after the end of the fiscal year to which they pertain, provided a satisfactory audit has been completed.	No	20.34A	603 CMR 32.05(12)
Commodity Distribution Program Records	3	3 years after the end of the fiscal year to which they pertain, provided a satisfactory audit has been completed.	No	20.34B	603 CMR 31.06(13)
Free and Reduced Lunch Eligibility Determination	3	3 years.	No	20.34C	603 CMR 34.07(l(k))
Lunch Program Records	3	3 years after the end of the fiscal year to which they pertain, provided a satisfactory audit has been completed.	No	20.34	603 CMR 29.05(17)

School District/Department Records Retention

revised 2011

Secretary of the Commonwealth/Supervisor of Public Records/Records Management Section/Records Retention Schedule

Series name	Years To Keep	Disposition period	hard copy?	Series number	Legal citation
Milk Program Records	3	3 years after the end of the fiscal year to which they pertain, provided a satisfactory audit has been completed.	No	20.34E	603 CMR 30.13(2)

School District/Department Records Retention

revised 2011

Secretary of the Commonwealth/Supervisor of Public Records/Records Management Section/Records Retention Schedule

Series name	Years To Keep	Disposition period	hard copy?	Series number	Legal citation
Paid Invoices	7	7 years, provided a satisfactory audit has been completed	No	20.34F	
Policies and Memoranda	3	3 years if no informational or evidential value.	No	20.34G	
Reimbursement Claims	7	7 years, provided a satisfactory audit has been completed	No	20.34H	

PAYROLL

Attendance Report - Personnel	2	After completion of satisfactory audit	No	20.50	
Attendance Reports; Substitute Teacher	2	After completion of satisfactory audit.	No	20.55	
Blue Cross, Reports to	2	2 years.	No	20.47	
Checks, Payroll, Cancelled	7	7 years after completion of satisfactory audit.	No	20.48	
Deduction Reports	2	After completion of satisfactory audit.	No	20.49	
Payroll Registers	2	After audit, provided information recorded and kept permanently in Payroll Quarterly Report.	No	20.52	
Payroll Weekly, Biweekly or Monthly	2	After completion of satisfactory audit, arovided recorded elsewhere in a summary record.	No	20.59	
Quarterly Reports	100	Permanent.	No	20.51	
Retirement Board, Reports to	2	After use. (BHRSD maintains 7 years.)	No	20.53	C.32 s.23
Retirement Ledgers	100	Permanent.	No	20.54	C.32 s.20
Tax Exemption Certificate	4	4 years or after use, whichever is later.	No	20.56	
Tax Withholding Statements	4	4 years or after completion of satisfactory audit, whichever is later. (BHRSD maintains 7 years.)	No	20.57	
Vacation Report	3		No	1.09	c.41 s. 111A; C.48, s57
Warrants	2	After completion of satisfactory audit.	No	20.58	c.41 s. 52, 56
Work Sheets	2	After completion of satisfactory audit.	No	20.60	

PERSONNEL

Accident Report Forms	7	7 years, provided no litigation is pending.	No	20.61	
Authorized Leave Report	3		No	1.09	
Employment Applications (Hired)	100	Permanent.	No	20.62A	
Employment Applications (Unhired)	2	2 years.	No	20.62B	
Personnel Files Other than Earning Records	20	20 years after termination of employment.	No	20.62C	
Employment Applications; Substitute Teacher	2	2 years after termination of employment.	No	20.63	
Tuberculosis; Report of School Personnel	3	3 years upon reverification.	No	20.64	c.71 s.55B
Vacancy Postings; Teaching	3	3 years.	No	20.65	

School District/Department Records Retention

revised 2011

Secretary of the Commonwealth/Supervisor of Public Records/Records Management Section/Records Retention Schedule

Series name	Years To Keep	Disposition period	hard copy?	Series number	Legal citation
-------------	---------------	--------------------	------------	---------------	----------------

PHYSICAL PLANT

Building Plans	100	If kept by Building Dept., until sold or demolished. Otherwise, permanent.	No	20.10	
Maintenance Posting Schedule	2	After completion of satisfactory audit.	No	20.80	
Maintenance Work Request Form	2	After completion of satisfactory audit.	No	20.70	

STUDENTS

Academic Program Administration Records	3		No	n/a	
Class Schedule Records	100		Yes	n/a	Permanent
Commencement and Awards Records	100		Yes	n/a	Permanent
Library Borrowers Records	1		No	n/a	
Student Admissions/Registration Records	3		No	n/a	
Student Athletic Participation Records	6		No	n/a	
Student Clubs and Associations Records	6		No	n/a	
Student Counseling Records	6		No	n/a	
Student Disability Records	5		No	n/a	
Student Discipline Records; Expulsion	25		No	n/a	
Student Discipline Records; Routine	3		No	n/a	
Student Graduation Records	100		Yes	n/a	Permanent
Student Health Clinic Records	10		No	n/a	105 CMR 220 MGL 70 34D
Student Immunization Records	10		No	n/a	105 CMR 220 MGL 70 34D
Student Newspaper	100		Yes	n/a	Permanent
Student Record Transcript Requests	1		No	n/a	
Student Scholarships, Fellowships, and Awards	5		No	n/a	
Student Support Services Records	3		No	n/a	
Student Tests and Examinations	1		No	n/a	
Teacher Certification Records	6	6 years after expiration	No	n/a	71 MGL 38G
Tenure and Promotion Records	6		No	n/a	

H01-01: HEGIS Report Records

Permanent.

Documents reports on the institution sent to the U.S. Department of Education.

H01-02: Dean's Records

Retain until administrative use ceases. Permission from RCB not required for destruction.

Document's the Dean's activities. Includes subject or correspondence files maintained for monitoring and decision making purposes.

H01-03: Satellite Campus Oversight Records

Retain until administrative use ceases. Permission from RCB not required for destruction.

Documents the management of satellite campuses. Includes reports, memos, directives, and related correspondence.

H02-01: Student Admissions and Registration Records

See sub-schedules for specific retention periods.

Documents applications to the school and subsequent progress. Includes transcripts, acceptance letters, transfer records, course credit sheets and evaluations, veteran information, and related correspondence.

H02-01 (a): Matriculated Students

Retain 5 years after graduation or separation from institution.

H02-01 (b): All other records

Retain 3 years.

H02-02: Student Immunization Records

See sub-schedules for specific retention periods.

Documents the immunization of students entering the institution. Includes immunization record and related correspondence.

H02-02 (a): Students entering health training programs

Retain 5 years after separation from the program.

H02-02 (b) All other records

Retain 10 years.

H02-03: Tuition and Fees Records

See sub-schedules for specific retention periods.

Documents tuition and fee structure, analysis, and policy.

H02-03 (a): Policy documentation

Permanent.

H02-03 (b): Actual payments

Retain 3 years after settlement.

H02-04: Student Financial Aid Records

Retain 5 years after separation.

Documents aid given to students to help pay for schooling. Includes financial aid applications, federal student aid forms, federal tax forms, award letters and confirmations, verification records, and interview documentation.

H02-05: Student Scholarships, Fellowships, and Awards Records

See sub-schedules for specific retention periods.

Documents the process to give scholarships and other aid awards.

H02-05 (a): Summary records

Permanent.

H02-05 (b): All other records

Retain 5 years.

H02-06: Student Record Transcript Requests Records

Retain 1 year.

Documents requests for student transcripts.

H03-01: Academic Program Administration Records

Retain 3 years.

Documents the routine daily administration of courses and programs of the institution. Includes referral, orientation, facilitative and other administrative correspondence and materials.

H03-02: Academic Advisement Records

Retain 3 years after student graduates or separates from academic program.

Documents faculty or academic advisors advisement of students.

H03-03: Student Internships and Practicums Records

Retain 5 years after separation. Record with registrar.

Documentation of field experience.

H03-04: Independent/Cooperative or Alternate Study Records

Retain 3 years.

Documents alternative course programming.

H03-05: International Studies Program Records

Review by the Archives after 6 years.

Documents programs of foreign study sponsored or in conjunction with other colleges.

H03-06: Award Establishment Records

See sub-schedules for specific retention periods.

Documents establishment of the awards.

H03-06 (a): Summary documentation

Permanent.

H03-06 (b): All other records

Retain until administrative use ceases. Permission from RCB not required for destruction.

H03-07: Commencement and Awards Records

See sub-schedules for specific retention periods.

Documents graduation ceremonies and awards given to outstanding students. Includes programs, program revisions, logistical support documentation, and related correspondence.

H03-07 (a): Final program with edits

Permanent.

H03-07 (b): All other records

Retain 3 years

H03-08: Name Change Authorizations

Retain 3 years from date of graduation or last attendance.

Documents legal name changes of students.

H03-09: Withdrawal Forms

Retain 3 years after student withdraws from academic program.

Documents withdrawal from academic program.

H04-01: Curriculum Development Records

Retain until administrative use ceases. Permission from RCB not required for destruction.

Documents the development of courses.

H04-02: Class Schedule Records

Official copy: Permanent.

Documents courses scheduled to be taught.

H04-03: Course Outlines and Descriptions Records

Permanent.

Documents descriptions of courses taught by institution.

H04-04: Curriculum Change Authorizations

Retain 3 years.

Documents changes to academic majors.

H04-05: Change of Course Forms (Add/Drop Forms)

Retain 1 year after submitted.

Documents late admissions to courses and withdrawals.

H04-06: Registration Forms

Retain 1 year after submitted.

Documents registration for courses.

H05-01: Student Tests and Examinations

See sub-schedules for specific retention periods.

Documents tests taken by students as part of course requirements.

H05-01 (a): Final tests taken as requirement for degree programs

Permanent.

H05-01 (b): All other records

Retain 1 year.

H05-02: Student Evaluations of Teachers

See sub-schedules for specific retention periods.

Documents student evaluations of courses and instructors. Includes questionnaires and summary reports.

H05-02 (a): Summarization

Retain summary report 6 years and discard data forms, otherwise retain data forms for 6 years

H05-02 (b): Data forms

Retain data forms 6 years if not summarized.

H05-03: Masters Theses

Permanent.

Documents papers completed as partial fulfillment of degree requirements.

H05-04: Academic Degree Audit Records

See sub-schedules for specific retention periods.

Documents review of student coursework to determine if they have met the requirements to receive their degree. Includes degree applications, degree audits, credit evaluations, course substitution forms, honors recommendations, and related notes and correspondence.

H05-04 (a): Approved degree application

Retain 5 years after graduation or separation.

H05-04 (b): Denied or withdrawn application materials

Retain 1 year.

H05-05: General Educational Development (GED) Certification Records

See sub-schedules for specific retention periods.

Documents the certification that an individual has passed the GED test as equivalent of a high school education.

H05-05 (a): Official copy

Retain 60 years.

H05-05 (b): All other records

Retain 3 years.

H05-08: Official Course and Grade Records

See sub-schedules for specific retention periods.

Provides a permanent record of student's courses taken and grades received as maintained by the Registrar.

H05-08 (a): Official courses taken and transcripts

Permanent.

H05-08 (b): Transcript requests

Retain 1 year.

H05-09: K-12 State Student Assessment Materials

See sub-schedules for specific retention periods.

Consists of test booklets, scorable materials, and non-scorable materials developed by the Department of Elementary and Secondary Education, pursuant to G.L. Ch 69 section 1I, to assess the academic performance and progress and English proficiency of students from Kindergarten to Grade 12, whose education is publicly funded by the Commonwealth of Massachusetts. The Department sends student assessment materials to schools where educators and qualified faculty administer tests to students. Those tests and test materials are then returned to the Department for scoring, review and analysis.

H05-09 (a): Unused master copy

See sub-schedules for specific retention periods.

H05-09 (b): Used answer booklets, used integrated test and answer booklets

Retain 3 years after reporting of results.

H05-09 (c): Typed electronic and printed responses

Retain 3 years after reporting of results.

H05-09 (d): Score or Performance Appeals of Statewide Student Assessments

Retain 5 years after appeal concluded.

H05-10: K-12 State Student Assessment Materials for Special populations of students

See sub-schedules for specific retention periods.

Consists of accommodated test editions and other materials created for the administration and scoring of K-12 statewide tests taken by students with disabilities or English language learners. Special Test Editions and Accommodations Materials may include, but are not limited to: graphic organizers, Individualized reference sheets, templates, checklists, Kurzweil Cds, ASL videos/DVDs, Braille tests and Administrator copies.

H05-10 (a): Special test editions

Retain 5 years.

H05-10 (b): Score, Feedback, Tracking Forms and Reports

Retain 3 years after reporting of results.

H06-01: Faculty Personal and Professional Papers

Review by the Archives if left in custody of institution.

Consists of faculty research or other materials where left in the institutions care.

H06-02: Tenure and Promotion Records

Retain 6 years.

Documents changes in faculty employment.

H06-03: Teacher Certification Records

See sub-schedules for specific retention periods.

Documents the certification of teachers by the Department of Education in compliance with 71 MGL 38G.

H06-03 (a): Records before 1980

Retain 40 years.

H06-03 (b): Records after 1980

Retain 6 years after expiration.

H06-04: Faculty Appointment Records

See sub-schedules for specific retention periods.

Documents the appointment and subsequent history of individuals to join the institution's faculty.

H06-04 (a): Summary records

Permanent.

H06-04 (b): All other records

Retain 6 years after separation.

H06-05: Faculty Workload Records

Retain 3 years.

Documents work assignments of individual faculty.

H06-06: Sponsored Research Records

Review by the Archives after 6 years after close.

Documents grants to pursue academic research.

H07-01: Student Event/Activities Applications Records

Retain 3 years.

Documents student participation in special activities.

H07-02: Student Clubs and Associations Records

Retain until administrative use ceases. Permission from RCB not required for destruction.
Documents the activities of student run clubs and associations.

H07-03: Student Government Records

Retain until administrative use ceases. Permission from RCB not required for destruction.
Documents activities of student government groups.

H07-04: Student Newspaper

See sub-schedules for specific retention periods.
Documents the publication of the student newspaper.

H07-04 (a): Final publications

Permanent.

H07-04 (b): Photographs and artwork

Retain until administrative use ceases. Permission from RCB not required for destruction.

H07-04 (c): Newspaper staff memorabilia

Permanent.

H07-04 (d): Summary policy and administrative records

Permanent.

H07-04 (e): All other records

Retain 3 years.

H07-05: Student Athletic Participation Records

Permanent.
Documents student participation in sports.

H07-05 (a): Summary documentation, films and photos

Permanent.

H07-05 (b): All other records

Retain 6 years after separation.

H08-01: Student Grievance and Complaint Records

Retain 3 years after closure.
Documents student complaints.

H08-02: Student Discipline Records

See sub-schedules for specific retention periods.
Documents the discipline of students for infraction of school policy.

H08-02 (a): Expulsion records

Retain 25 years.

H08-02 (b): All other records

Retain 3 years after separation.

H08-03: Student Disability Records

Retain 5 years after student graduates or withdraws.
Provides a record of disability information on students.

H08-04: International Students Case Files

Retain 5 years after separation.
Documents international students enrolled at the school.

H09-01: Student Support Services Records

See sub-schedules for specific retention periods.

Documents programs to support student life.

H09-01 (a): Substantive summary data

Permanent.

H09-01 (b): All other records

Retain 3 years.

H09-02: Special Services Program Records

See sub-schedules for specific retention periods.

Documents special programs for students not within normal course schedule.

H09-02 (a): Summary records

Permanent.

H09-02 (b): All other records

Retain 3 years.

H09-03: Student Counseling Records

Retain 6 years after separation.

Documents social services provided to students.

H09-04: Student Career and Placement Records

Retain 10 years.

Documents records kept on file for placement purposes.

H09-05: Student Health Clinic Records

Retain 20 years.

Documents student clinic health histories. Includes visit documentation and charts, medical notes, and related correspondence.

H09-06: Residence Hall Records

Retain 3 years unless pending litigation.

Documents residence halls: occupancy/license agreements for rooms; room inventories and work orders.

H10-01: Library Borrowers Records

Retain until items are returned.

Documents library use by patrons.