

# Great Oaks Academy

## Data Inventory, Retention, and Destruction Policy No. 110

### I. Purpose

This policy sets forth the governing rules for data inventory, retention and destruction at Great Oaks Academy.

- A. Records are vitally important to the operation of any organization; they serve as the organization's memory and are evidence of past events and the basis for future action. When created, maintained and disposed of in an orderly and systematic manner, records can be a tremendous asset; when treated in a haphazard and disorderly manner, they reduce the effectiveness of an organization and increase its costs substantially. The purpose of this records inventory, retention and destruction policy is to provide a plan for managing records under Minnesota Statutes 138.17; as well as to support the school's obligations under the Minnesota Government Data Practices Act.

### II. General Statement of Policy

- A. Great Oaks Academy takes seriously its obligations to preserve information as required by law, and as necessary with regard to litigation, audits, and investigations.
- B. The information listed in the retention schedule below is intended as a guideline and may not contain all of the records which Great Oaks Academy may be required to keep, now or in the future. Questions regarding the retention of documents not listed in this chart should be directed to the Executive Director.
- C. From time to time the Executive Director may issue a notice, known as a "legal hold," suspending the destruction of records due to pending, threatened, or otherwise reasonably foreseeable litigation, audits, government investigations, or similar proceedings. No records specified in any legal hold may be destroyed, even if the scheduled destruction date has passed, until the legal hold is withdrawn in writing by the Executive Director.

### III. Schedule of Retention

Great Oaks Academy adopts and incorporates by reference the provisions of the attached Exhibit A: State of Minnesota School District General Records Retention Schedule (2000), approved for Minnesota School Districts by the Records Disposition Panel pursuant to Minnesota Statutes 138.17.

### IV. General Provisions

- A. Great Oaks Academy adopts and incorporates by reference the provisions of the attached document that includes the records retention schedule:  
<http://www.region1.k12.mn.us/main/Portals/0/SMART%20Systems/SMARTFIN/docs/DistrictGeneralRecordsRetention.pdf>

Adopted: 4/17/2023

Revised:

- B. General Records Retention Schedules Available Online, Minnesota Historical Society,  
<https://www.mnhs.org/preserve/records/retentionsched.php>

**Legal References:**

Minnesota Statutes 138.17

Minn. Stat. §124E.03, subd. 5(b) (Charter Schools; Applicable Law)

Minn. Statutes Chapter 13 (Data Practices Act)

Minn. Statutes section 15.17 (The Official Records Act)

**Cross References:**

<http://www.region1.k12.mn.us/main/Portals/0/SMART%20Systems/SMARTFIN/docs/DistrictGeneralRecordsRetention.pdf>

<https://www.mnhs.org/preserve/records/retentionsched.php>