

Ms. Maria Teresa Rojas, Board Chair

SUBJECT: RECORDS MANAGEMENT AND RETENTION

- 1. REVIEW OF SCHOOL BOARD POLICY 8320 – RECORDS MANAGEMENT**
- 2. SUPPORT FOR SCHOOL BOARD OFFICES**
- 3. AUDIT/REVIEW OF RECORDS MANAGEMENT AND RETENTION IN MIAMI-DADE COUNTY PUBLIC SCHOOLS**

COMMITTEE: FISCAL ACCOUNTABILITY AND GOVERNMENT RELATIONS

LINK TO STRATEGIC PLAN: EFFECTIVE & SUSTAINABLE OPERATIONAL PRACTICES

Florida Statute (F.S.) 257.36, *Records and Information Management*, outlines the process for the establishment of procedures for the controlling, retaining, destroying, and preserving of public records. Public records are defined in F. S. 119.011 (12). Additionally, Miami-Dade County School Board Policy 8320, *Records Management*, provides further guidelines for the administration, scheduling, and disposition of public records in the school district.

Effective records management and retention is crucial for School Board Members as it ensures transparency, accountability, and legal compliance of all statutes and policies. Properly maintained records provide a clear and accessible history of decisions, policies, and financial actions, which is essential for informed governance and community trust. Retention policies help safeguard sensitive information, support continuity during leadership transitions, and ensure readiness for audits or legal inquiries. By adhering to established records retention schedules, School Board Members uphold their responsibility to protect public resources and maintain the integrity of the school district's operations.

At the School Board meeting of December 14, 2016, School Board Member Mari Tere Rojas proffered Agenda Item H-12 Revised, which authorized the Superintendent to provide guidelines offering training, guidance and support related to records management and retention for Board Members and their staff, in compliance with Florida statutes and Board policy and report such guidelines to the Board by February 15, 2017. A staff follow-up from the Superintendent dated February 13, 2017, included some actions to be included in the *Manual for Board Member Assistants*, available training, and the accessibility of further assistance as requested.

The final report from the Office of the Inspector General, *Review of Purchasing Procedures and P-card Expenditures for Current and Former School Board Members for the Period of July 1, 2018 to December 31, 2023; Ref: IG24-0001-SA, May 15, 2025*, specifically addresses certain points regarding records retention.

“The Records Retention Schedule & Guidelines created by the Records and Forms Management Office outlines the record retention schedule for M-DCPS. According to the Records Retention Schedule Guidelines issued by M-DCPS, the record retention policy defines that the record copies for travel records, disbursement records, and purchasing records, shall be for five fiscal years provided that applicable audits have been released. Once the records are eligible for destruction, a disposition request must be completed and forwarded to the Records and Forms Management Office prior to disposal.” (Page 18)

Throughout the report there are a number of instances where records were not properly secured or retained by some former School Board Members. On page 111 of the report, under Observations and Recommendations, Observation Number 1 states “Records and related supporting documentation for all P-card purchases were requested from the M-DCPS School Board Members for the period of July 1, 2018 through December 21, 2023. The School Board Members and corresponding staff were unable to provide support for numerous transactions during the respective period. M-DCPS has a record retention policy requiring all School Board Members to maintain all supporting documentation involving P-card transactions.” While some of the comments delineated in the report are associated to some former Board Members and not all, it is important to ensure that all records retention safeguards, pursuant to School Board policy and Florida Statutes are adhered to.

Therefore, this agenda item seeks to direct the Superintendent of Schools and the General Counsel to review School Board Policy 8320, provide continuous support for School Board Members regarding records retention and management, and direct the Chief Auditor to include in the Audit Plan that will be presented to the Audit and Budget Advisory Committee (ABAC) on July 29, 2025, the audit/review of records management and retention in Miami-Dade County Public Schools.

This agenda item has been reviewed by the Office of the General Counsel as to form and legal sufficiency.

ACTION PROPOSED BY CHAIR

- MS. MARIA TERESA ROJAS** That The School Board of Miami-Dade County, Florida, direct the Superintendent of Schools and the General Counsel to:
1. review and update School Board Policy 8320 – *Records Management*, as necessary, for first reading at the Board meeting of August 12, 2025, to ensure that there is sufficient information to guarantee, as much as possible, clarity and adherence to Florida Statute 257.36;
 2. develop a comprehensive plan to provide support to School Board Members and their staff, including annual training in records management and retention, and wide-ranging support for new School Board Members and those Board Members who will be ending their tenure to ensure all records are properly secured, and provide this report to the Board by August 12, 2025; and
 3. direct the Chief Auditor to include an audit/review of records management and retention in Miami-Dade County Public Schools and incorporate this action on the Audit Plan being presented to the Audit and Budget Advisory Committee (ABAC) on July 29, 2025.