



2019 LOCAL GOVERNMENT AGENCIES GENERAL RECORDS RETENTION AND DISPOSITION SCHEDULE

Records Series

Standard 1: Administration and Management Records

- Abstracts of Municipal Elections
- Accreditation Records
- Administrative Directives, Regulations, and Rules
- Agenda and Meeting Packets
- Applications for Appointment
- Appointment Reports
- Audio and Video Recordings of Meetings
- Audits: Performance
- Blueprints and Specifications
- Bonds
- Bulletins
- Business Certification Records
- Business Development Subject File
- Calendars of Events and Appointments
- Census Project Records
- Charter Records
- Citizen Comments, Complaints, Petitions, and Service Requests
- Citizen Rebate Program Records
- Citizen Surveys
- Collected Data
- Comprehensive Plan
- Correspondence and Memoranda
- Customer Call Center Recordings
- Equipment and Vehicle Maintenance, Repair, and Inspection Records
- Equipment and Vehicle Reference Records
- Equipment, Facility, and Vehicle Usage Records
- Facility Maintenance, Repair, and Inspection Records
- Forms and Templates
- Governing and Advisory Body Member Files
- Grant Proposals
- Grants
- History Records (Agency and Employees)
- Improper Conduct Investigations
- Indices
- Interagency Programs
- Inventories
- Legislation and Regulatory Records

Logistics Materials
Mail: Undeliverable/Returned
Mailing and Distribution Records
Membership Records
Minutes of Public Bodies
Minutes (Staff Meetings)
Miscellaneous (Non-Building) Applications, Licenses, and Permits
Notices of Public Meetings
Office Security Records
Ordinances
Pest Control
Policies and Procedures
Poll List/Registration List/Roster/Authorization to Vote (ATV)
Price Quotations
Proclamations and Orders
Projects
Property Management Records
Rate and Fee Schedules
Records Management
Reference (Reading) File
Reports and Studies
Requests for Information
Requests for Proposals (RFP)
Resolutions
Surplus Property
Tracking Materials
Travel Requests
Vehicle Registration Cards
Work Orders

Standard 2: Budget, Fiscal, and Payroll Records

Accounts Payable
Accounts Receivable
Accounts Uncollectable
Annual Budget
Arbitrage Records
Audits: Financial
Authorization Forms
Bank Statements and Reconciliations
Bids for Disposal of Property
Bids for Purchase
Bond Closing Records
Bond Register
Bonds, Notes, and Coupons
Budget Administration Records

Budget Execution Records
 Budget Reports
 Budget Requests and Working Papers
 Budget Resolutions and Ordinances
 Cost Allocation Plans
 Credit/Debit/Procurement Card Records
 Donations and Solicitations
 Electronic Funds Transfers (EFT)
 Escheats and Unclaimed Property
 Financial Journals and Ledgers
 Financial Reports
 Government Employees Retirement System Monthly Reports
 Grants: Financial
 Investments
 Loan Records
 Local Government Commission Financial Statements
 Longevity Pay
 Payment Card Data
 Payroll and Earnings Records
 Payroll Deduction Records
 Powell Bill Records
 Purchase Orders
 Qualified Products Lists (QPL)
 Requisitions
 Scholarship Records
 Shift Premium Pay
 Statements of Back Pay
 Tax Forms
 Tax Returns
 Time Sheets, Cards, and Attendance Records
 Travel Reimbursements
 Vendors

Standard 3: Geographic Information System (GIS) Records

Geographic Information System (GIS) Core Data
 Geographic Information System (GIS) Data Documentation (Metadata)
 Geographic Information System (GIS) Internal Standards and Procedures
 Geographic Information System (GIS) Monitoring Records
 Geographic Information System (GIS) Operational Records
 Geographic Information System (GIS) Project Records
 Layers: Address Points
 Layers: Corporate Limits
 Layers: Extraterritorial Jurisdictions
 Layers: Orthoimagery
 Layers: Street Centerline

Mapping Project Records

Maps: Parcel

Maps: Parks

Maps: All Other

Standard 4: Information Technology (IT) Records

Audits: IT Systems

Computer and Network Usage Records

Data Documentation Records

Data Migration Records

Data Warehouses

Digitization and Scanning Records

Electronic Records Policies and Procedures

Information Technology Assistance Records

Network and System Security Records

Network Diagrams

Project Documentation

Software License and Copyright Provisions Records

System Access Records

System Documentation Records

System Maintenance Records: Hardware Repair or Service

System Maintenance Records: Records Backups

Technical Program Documentation

Voice over Internet Protocol (VoIP) Records

Web Management and Operations Records: Structure

Standard 5: Legal Records

Affidavits of Publication

Authentications

Civil Rights Case Records

Civil Rights Records

Condemnation Records

Conflict of Interest and Conflict of Commitment Disclosure Statements

Contracts, Leases, and Agreements

Declaratory Rulings

Delegation of Authority Records

Easements and Right-of-Way Agreements

Encroachments

Land Ownership Records

Legal Correspondence

Legal Opinions

Legal Review Records

Litigation Case Records

Oaths of Office

Permissions

Pre-Trial Release Program Records
Reasonable Accommodations
Release Forms
Vehicle Titles

Standard 6: Personnel Records

Abolished Positions
Administrative Investigations
Applications for Employment
Apprenticeship Program Records
Aptitude and Skills Testing Records
Asbestos Training
Benefits Records
Bloodborne Pathogen Training
Certification and Qualification Records
Directories, Rosters, or Indices
Disability Salary Continuation Claims
Disciplinary Actions
Dual Employment
Educational Leave and Reimbursement
Eligibility Records
Employee Assistance Programs
Employment Selection Records
Exit Interview Records
Family Medical Leave Act (FMLA) Records
Grievances
Hazardous Materials Training Records
Internship Program
Law Enforcement Training
Leave Records
Medical Records
Military Leave
Performance Reviews
Personnel Action Notices
Personnel Records (Official Copy)
Personnel Records (Supervisor Copy)
Policies and Procedures (Personnel)
Polygraph Records
Position Classification, Control, and History
Position Descriptions
Position Evaluations
Recruitment Records
Retirement Records
Seasonal and Contract Worker Records
Secondary Employment

- Service Awards and Commendations
- Suggestions and Surveys
- Training and Educational Records
- Unemployment Compensation Claims
- Unemployment Compensation Reports
- Unemployment Insurance
- Verification of Employment Records
- Volunteer Records
- Work Schedules and Assignments
- Workers' Compensation Program Administration
- Workers' Compensation Program Claims

Standard 7: Public Relations Records

- Agency Publications
- Audio-Visual Recordings
- Community Awards
- Conferences and Workshops
- Educational Materials
- Fund Drive and Event Records
- Invitations
- Media File
- Popular Annual Finance Report
- Public Hearings
- Public Records Requests
- Publicity Records
- Social Media
- Speeches
- Website (Electronic)

Standard 8: Risk Management Records

- Accident/Incident Reports (Customer and Employee)
- Asbestos Management Plan
- Declarations and Terminations of States of Emergency
- Disaster and Emergency Management Plans
- Disaster Recovery
- Emergency Drills and Equipment Records
- Employee Security Records
- Fire, Health, and Safety Records
- Fuel Oil Storage Tank Records
- Hazardous Materials Management
- Insurance Policies
- Loss Control Inspection Reports
- Lost, Stolen, or Damaged Property Reports
- Occupational Safety and Health Administration (OSHA)
- Safety Data Sheets

Standard 9: Workforce Development Records

Audit/Audit Resolutions

Local Area Job Training Plan Records

Participant Records