

CITY OF HOMER CLASSIFICATION AND PROCEDURE MANUAL AND RECORDS RETENTION SCHEDULE



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PREFACE

The purpose of this City of Homer Records Classification and Procedures Manual and "Retention Schedule" is to ensure compliance with all federal, state, and local laws regarding retention of vital records or records having legal or historical value generated or held by the City of Homer, Alaska ("City").

INTRODUCTION

AS 40.21: Management & Preservation of Public Records

Alaska Statute 40.21 requires the orderly management of current local public records and preservation of noncurrent public records that have permanent historical value. Alaska Statute 40.21.070 says "the governing body of each political subdivision of the state shall promote the principles of efficient records management for local public records..." Moreover, per AS 29.20.380(4) the municipal clerks shall "manage municipal records and develop retention schedules and procedures for inventory, storage and destruction of records." Similarly, HCC 2.08.010(e) requires the City to adopt a classification and procedure manual.

What is a Record?

"Record" means recorded information in any form, including without limitation any document, paper, book, letter, photograph, microfilm, map, drawing, chart, card, magnetic media or computer printout, developed or received under law or in connection with the transaction of official business and appropriate for preservation as evidence of the organization, function, policies, decisions, procedures, operations, or other activities of the City or because of its informational value. The term "record" does not include:

1. Library and museum material developed or acquired and preserved solely for reference, historical or exhibition purposes, extra copies of documents preserved solely for convenience of reference, or stocks of publications and processed documents.
 2. Reference documents.
 3. Transitory documents.
- (see HCC 2.04.010 (g))

The Four Values of Records That Impact Retention	
Administrative/ Operational:	These records are needed for current operations of the City.
Financial:	Financial records document fiscal transactions needed for tax and audit purposes.
Legal:	The value of a record for use as evidence in pending or threatened

	litigation or to document a legal relationship or event. (HCC 2.04.010(e))
Historical:	The value of a record for use at a later date in reconstructing a general history of the development and government of the City (HCC 2.04.010(c)).

GLOSSARY

Vital Records:	Records necessary to assure continuance of essential governmental operations to protect the legal and financial operation of the City in the event of disaster or catastrophic loss of City records. (HCC 2.04.010(k))
Disposition:	The process where a record is either destroyed or transferred to archives as prescribed by this records retention schedule.
Duplicates:	Duplicate records are all other copies of a record not considered to be the Official Record Copy. In essence this means that if your department does not hold the Official Record Copy, you hold a duplicate copy and must retain this duplicate for the prescribed period of time as stated in this Retention Schedule.
Official Record Copy:	The Official Record Copy refers to the copy of the record that must be retained to fulfill all legal responsibilities and must be retained for the total retention period stated.
Records Series:	A group of alike records filed together by their content e.g. reading files.
Retention:	This refers to the length of time for which records must be preserved.

1. General Administrative

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
1. GENERAL ADMINISTRATIVE			
1.1	<p>General Correspondence</p> <p>Consists of original incoming and copies of outgoing letters and memoranda related to the general administration and operation of the City, often arranged topically according to a file classification system. Includes the following types of correspondence: intra/inter-departmental, legislative, professional association, committees, and public. Also may consist of conference/training notes, organizational charts, delegations of authority, share campaign, inventories/logs, studies, service pin award data, etc.</p>	3 years then destroy*	* = <i>General Correspondence</i> of Mayor, City Manager, Clerk, Department Head, and Boards & Commissions may have archival value and should be retained permanently.
1.2	<p>Reading Files</p> <p>Copies of outgoing letters, memoranda, and messages. Maintained as a discrete records series, these files are used for various administrative purposes.</p>	3 years then destroy*	* = <i>Reading Files</i> of the Mayor, City Manager, Clerk, and Department Heads may have archival value and should be retained permanently.
1.3	<p>Policies & Procedures</p>		
1.3.1	<p>Major</p> <p>Substantive and binding department issued policies, procedures, directives, decisions, orders, rules, guidance, agreements, understandings, and manuals that address mission essential functions for which the department is statutorily responsible.</p> <p>These records document department functions and have</p>	Retain Permanently	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
1.3.2	<p>archival research value.</p> <p>Routine</p> <p>Routine City issued policies, procedures, directives, decisions, rules, organizational charts, and manuals that address internal functions and operating procedures.</p> <p>Major & Routine Policies & Procedures (including rules and regulations) consist of the Official Record Copy formalized by any Department.</p>	C+3 years then destroy	<i>C = Until superseded/obsolete.</i>
1.4	Reports		
1.4.1	Annual, Audit, Management & Operation	Retain Permanently	
1.4.2	<p>All Others</p> <p>"All Others" includes Monthly, Statistical, Performance, Damage & Vandalism, Safety, Monitoring etc.</p>	3 years then destroy	
1.5	Administrative Studies/Special Projects		
	Includes final reports and backup data regarding major administrative studies and special management projects.	Retain Permanently	Review backup data for archival value.
1.6	Department History Files		
	This series documents the functions and activities of the Department. Consists of promotional media including press releases, news clippings, photographs (prints & negatives), videos, audios, cd's, dvd's and other electronic, magnetic or micromedia. Also includes	Retain Permanently	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	information officer project materials, Department head speeches, written histories, monographs, brochures, pamphlets, etc.		
1.7	Equipment Records		L = Life of equipment.
1.7.1	Delivery Order, Correspondence, Usage Reports, General Maintenance & Inventories	L+4 years then destroy	
1.7.2	Warranty Information, Instruction/Operating Manuals, Repair/Maintenance History, etc.	L+4 years then destroy	
1.8	Property Control Files Department copies of controlled property management reports, property tag register, excess property reports, property transfer documents, and related correspondence.	5 years then destroy	
1.9	Automotive Management		L = Until vehicle is disposed.
1.9.1	Vehicle Records This series documents each vehicle owned and serviced by the City. May include title; registration; work orders; correspondence; damage/accident reports; checklists; photographs; and, inspection, service, maintenance and repair documents.	L+2 years then destroy*	* = If vehicle is involved in fatal accident or litigation, keep file 25 years or until legal counsel recommends disposition.
1.9.2	Claim Files Includes copies of the following: <i>Motor Vehicle Accident Reports, Certification of Insurance, Lost-Stolen-Damaged Property Reviews, inspection reports, maintenance records (parts, service, repair estimates, work orders) Liability Accident Notices,</i>	L+3 years then destroy	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	registrations, and titles.		
1.10	Injury & Accident Records Includes incident/accident reports, medical evaluations, public safety officer reports, time loss documentation and other data relating to on the job injuries and accidents.	C+6 years then destroy	C = Resolution of accident.
1.11	Transitory & Miscellaneous Administrative Information Including telephone logs, correspondence tracking logs, file plans, purchasing logs, property inventories, message books, appointment books/calendars, bulletins, mailroom logs/registers (e.g. certified/registered, postage meter) word processing drafts, day sheets, assignments, suspense files, forms files, printing/stock requests, fuel inventory sheets and other indices.	C then destroy	C = Until administrative need is met.
1.12	Drafts & Working Papers This series contains documents, correspondence, reports, memoranda, and other materials in preliminary or developmental form before their iteration as a final product. Drafts may include copies of materials circulated for review for grammar, spelling and content. Working papers may include notes and miscellaneous documents used in compiling and assembling the final product.	C then destroy	C = Until administrative need is met.
1.13	Technical Reference Files Technical studies, newsletters and publications used in the	C then destroy	C = Until administrative need is met.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	administration of department business.		
1.14	<p>Public Records Log & Requests for Public Information</p> <p>Includes written request for public records received. Log includes date of request, name of requester and other related information.</p> <p>Technical studies and publications used in the administration of City business.</p>	1 year then destroy	
1.15	<p>Website Content, Management & Operations Records</p> <p>Web site-related records include 1) web content records, which represent information presented on a web site, and 2) web site administrative records, which provide evidence of the management and operations of the website. Records may include: web master policies; procedures; notes; content pages, inclusive of the HTML markup; records generated when a user interacts with a site; lists of URL's referenced in the site's hyperlinks; web site design records; records addressing usage of copyrighted material; software applications used to operate the site; web snapshots; site maps depicting directory structure/hierarchy; server environment configuration specifications; web page metrics/statistics; and, other development materials utilized in the creation and maintenance of department sites.</p>	3 years then destroy*	* = Review for permanent retention. Backup tapes are stored offsite for security. Tapes are rotated according to departmental backup procedures.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
1.16	Records & Information Management Files		
1.16.1	File Plans and Records Retention Schedules	Retain Permanently	
1.16.2	Records Disposition Certificates	Retain Permanently	
1.16.3	Records Transfer Lists (RTL)	Retain Permanently	
1.17	Automatic Data Processing & Electronic Data Processing Media Office copies of magnetic cards/tapes/diskettes and other media used for communicating with data processing equipment or as preliminary input, temporary storage, output control which serves as an intermediate means for the production of printouts, Computer-Output Microfiche (COM) or online data.	C then destroy	C = Retain until superseded/obsolete or administrative need is met.
1.18	Officials' Bonds	C+6 years then destroy	C = Expiration of bond provided an audit has been conducted.
1.19	Visitor Logs This records series consists of records documenting employees' and visitors' entrance into a City building during and/or after office hours. Logs may require time, date, signature, reason for visit, and location or person visited.	3 years then destroy	Civil litigation for personal injuries statute of limitations is 2 years to file a lawsuit. Oftentimes the lawsuit is not served for another 90 days or more after filing. Visitor logs are helpful to establish potential witnesses or to corroborate the presence of witnesses.
2. CLERK & GOVERNING BODY			

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
2.1 2.1.1 2.1.2	<p>Meeting Files</p> <p>Official Minutes</p> <p>Backups</p> <p>The Official Minutes constitute the official accounts of the proceedings and actions of the City Council, boards, commissions, committees, community councils and special work groups.</p> <p>Other backup may include notices of meeting, agendas, packets, meeting dockets, roll call, correspondence, complaints, reports, transcripts, legal opinions, financial studies, declarations, recommendations, amendments to Council rules, ordinances and resolutions, background papers and audio/visual products.</p>	<p>Retain Permanently</p> <p>C then destroy</p>	<p>C = Until minutes have been approved.</p>
2.2	<p>Public Hearing Files</p> <p>Includes the following documentation related to public hearings: notices of meetings, affidavits of publication, work papers, speaker signup sheets, written testimony, exhibits and audio/visual materials.</p>	<p>10 years then destroy</p>	
2.3	<p>Petitions</p> <p>For initiatives, referenda and recall filed by private citizens or groups requesting City Council action..</p>	<p>6 years then destroy</p>	<p>AS 29.26</p>
2.4	<p>Proclamations</p> <p>Issued/prepared by mayor or City Council..</p>	<p>Retain Permanently</p>	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
2.5 2.5.1 2.5.2	<p>Codes, Ordinances & Resolutions</p> <p>Adopted</p> <p>May include supplements to the Homer City Code, lists of all ordinances/resolutions, ordinance/resolution number and ultimate decision.</p> <p>Not Adopted</p> <p>May include lists of all proposed ordinances/resolutions, the proposer, ordinance number and ultimate decision (e.g. changed, withdrawn, in committee indefinitely).</p>	<p>Retain Permanently</p> <p>10 years then destroy*</p>	<p>Maintain certified copy of all official ordinances in a separate ordinance file.</p> <p>AS 29.20.380</p> <p>* = Files with historical value should be retained permanently.</p>
2.6	<p>Oaths of Office & Appointments</p> <p>This series may consist of oaths for boards, commissions, committees, councils and elected officials; and, affirmations, acknowledgements, notices of appointments/resignations, lists of members with terms and dates of appointment, and the code or executive order establishing the City.</p>	Retain Permanently	AS 29.20.600
2.7	<p>Conflict of Interest Statements</p> <p>Statements for elected/appointed municipal officers and employees.</p>	6 years then destroy	AS 29.20.010
2.8	<p>Incorporation Files</p> <p>Documents incorporation records series not found elsewhere on this schedule (petitions, public hearings, etc). May include information related to investigations, decisions, City logo and official City seal.</p>	Retain Permanently	AS 29.05

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
2.9	Annexation Files		
2.9.1	Passed	Retain Permanently	
2.9.2	Failed Includes petitions, correspondence, affidavits of publication, copy of ordinance and related public hearing backup records.	5 years then destroy	
2.10	Reapportionment & Redistricting Records May include City and school district reapportionment records; precinct boundaries; and, district, municipal and state boundary reapportionment documentation.	C then destroy	C = Until superseded.
2.11	Census Records This series documents population estimates including resident data (e.g. name, age, gender, marital status, residence address, number of children, annual income, occupation, etc.)	C then destroy	C = Until superseded. Retain backup data for 10 years. AS 29.60
2.12	Cemetery Master Files May include diagrams, maps and indices of burial plots, record of lot sales, cash/deed book, burial permits, register of interments, and minutes of cemetery association/board.	Retain Permanently	
2.13	Asset Inventories		
2.13.1	Fixed	L then destroy	L = Life of asset, or until State authorizes disposal of grant funded assets.
2.13.2	Non-Fixed Inventories of owned assets indicating value, location, purchasing information, etc. The	3 years then destroy	Backup records dealing with an asset may be disposed per

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	Government Accounting Standards Board (GASB) requires municipalities to record infrastructure as part of their fixed assets.		policy according to type (purchase order, grant, correspondence, etc.)
2.14	<p>Land Classification Case Files</p> <p>Documents actions to classify lands within the jurisdiction of the City. May relate to acquisitions, sales, leases, management agreements, letters of entry, timber sales, resource sales, etc.</p>	C+10 years then destroy	<p>C = Until resolution of the case.</p> <p>If case files subject to potential litigation, retain until file no longer has legal value.</p> <p>Some files may have permanent archival value.</p>
2.15	<p>Road Name Changes</p> <p>Includes information regarding road name changes and copies of affidavit of publication.</p>	Retain Permanently	
3. FINANCE & AUDIT			
3.1	<p>General Accounting Records</p> <p>May include work papers, spreadsheets, summaries, receipts and other data documenting Department accounting practices. Includes financial data regarding accounts payable/receivable, grant/contract administration, assessment of fines, payment of license fees, etc.</p>	3 years then destroy*	* = Provided an audit or other annual financial statement has been certified.
3.2	<p>Travel Accounting</p> <p>This series documents travel advances, per diem and transportation fees for employees on official City business.</p>	3 years then destroy	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
3.3	Department Budget Files		
3.3.1	Work papers This series documents development of Department operating and capital budgets prior to presentation to City Council. Includes budget instructions, submissions, backup documentation, cost allocations, annual estimates of revenue and amendments.	3 years then destroy	
3.3.2	Final Approved Budget	Retain Permanently	
3.4	Financial & Accounting Reports		
3.4.1	Annual	Retain Permanently	
3.4.2	Other Includes Annual Report and annual estimates of revenue prepared by the Finance Director summarizing financial condition, activity and balances; and, routine balancing/status reports output on a regular or ad hoc basis documenting City expenditures and financial activity.	CFY+3 years then destroy	CFY = Current Fiscal Year. See item #1.4.1 for Audit Reports.
3.5	Ledgers & Journals		
3.5.1	General, Revenue & Expenditure Includes books of original entry.	Retain Permanently	
3.5.2	Subsidiary	CFY+3 years then destroy	CFY = Current Fiscal Year.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
3.6	<p>Vendor Files</p> <p>Documentation relating to payment for commodities or services, fines, fees and permits. Consists of financial transaction registers, vouchers, delivery orders, purchase orders, logs, supply requisitions, advertising orders, invoices, postage meter receipts, etc.</p>	CFY+3 years then destroy	CFY = Current Fiscal Year.
3.7.1	<p>Banking Records</p> <p>This series consists of records of bank transactions for revenue and payments and fund investment records, including: deposit slips, wire transfers, agent fees, transmittal of receipts, savings account data, debt service payments and collected monies of a Department.</p>	CFY+3 years then destroy*	CFY = Current Fiscal Year. * = Provided an audit or other annual financial statement has been certified.
3.7.2	Original Bank Statements	CFY+7 years then destroy	
3.8	<p>Cancelled Checks & Check Registers</p>	CFY+3 years then destroy*	CFY = Current Fiscal Year. * = Provided an audit or other annual financial statement has been certified. Recommend that cancelled checks be retained with grant files.
3.9	<p>Cash Books & Cash Journals</p> <p>Ledger showing details of daily receipts and expenditures, including running balances for each fund.</p>	CFY+3 years then destroy*	CFY = Current Fiscal Year. * = Provided an audit or other annual financial statement has been certified.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
3.10	<p>Revenue Sharing/Safe Communities Files</p> <p>The City may be allocated money on a formula basis for public/ice roads, fire departments, etc. May consist of applications, correspondence, year-end audits/budgets.</p>	3 years then destroy	
3.11	<p>Bond Records</p> <p>Includes cancelled/redeemed bonds/coupons documenting proof of issuance and payments to individual bondholders.</p>	3 years then destroy*	* = Provided an audit or other annual financial statement has been certified.
3.12	<p>Bond Registers</p> <p>Includes bond/coupon register (numeric listing of bonds/coupons).</p>	C+20 years then destroy	C = Until issue called.
3.13	<p>Bills of Sale</p> <p>Official documentation of sales transactions between the City and buyer.</p>	7 years then destroy	
3.14	<p>Foreclosure Files</p> <p>Documents foreclosures and includes delinquency reports, billings, petition of judgment, certified mailings, final judgments, and certificates of redemption.</p>	C+10 years then destroy	<p>C = Until case is closed.</p> <p>Per AS 09.10.030 there is a 10 year statute of limitations on action to recover real property.</p> <p>Certain files may have archival value.</p>
4. PAYROLL			
4.1	<p>Payroll Warrant Register</p> <p>Lists check number, employee name, net amount and financial coding.</p>	T+10 years then destroy	T = Termination of Employee.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
4.2	Payroll Journal	3 years then destroy*	* = Provided an audit or other annual financial statement has been certified.
4.3	Payroll Case Files These case files document employee salary and may include: payroll action forms, PERS/TRS enrollment/change forms and IRS data.	T+10 years then destroy	T = Termination of Employee.
4.4	Payroll Deduction Authorizations Includes reports and lists.	4 years then destroy	
4.5	Leave Accounting Timesheets—daily, weekly or monthly record of hours worked—and documentation for accrued/used leave.	3 years or 50 years then destroy*	* = Only destroy these after 3 years if you retain the associated data or leave accounting record elsewhere. If you have questions, contact the State of Alaska, Division of Retirement & Benefits for clarification.
4.6	Employer W-2 Copy Federal withholding tax statement.	4 years then destroy	
4.7	Employee Pay Record Cards Documents gross earnings, deductions and net pay for each employee.	50 years then destroy	
4.8	Employee Withholding Exemptions (W-4)	4 years then destroy	
4.9	Garnishment & Payroll Deduction Court Orders	50 years then destroy	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
4.10	Notification of Pay Step Increases	50 years then destroy	
4.11	Payroll Reports May include the following reports: Federal Insurance Contribution Act, unemployment insurance, summary/special detailed queries, stopped/reissued warrants, overtime and retirement.	4 years then destroy	
4.12	Electronic Federal Tax Payment (EFTPS) Documentation This series documents tax deposits transmitted to the federal government. Includes spreadsheets and other backup.	4 years then destroy	
4.13	Internal Revenue Service Reports & Reconciliations May consist of the following IRS reports: 1099R and related reports, and 945. May include reconciliations (work papers) regarding tax liability for retirees and their beneficiaries.	C+4 years then destroy	C = Until due date of appropriate tax return period or date tax is paid, whichever is later. 26 CFR 31.6001-1.
4.14	Savings Bond & 401k Accounting Records	50 years then destroy	
5. PROCUREMENT, CONTRACTS & GRANTS			
5.1	Procurement Records This series includes documents related to purchases of goods and services and may include: bid specifications, requests for proposal, vendor solicitations, price quotations, bid abstracts, purchase orders/requisitions, contracts/leases, delivery orders, correspondence and tracking logs.	CFY+3 years then destroy.	CFY = Current Fiscal Year. Refer to item #5.2 if a formal contract is required. Refer also to item #3.6 (Vendor Files).

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
5.2	Contract Administration Consists of notification of award, original contract, and amendments or renewals, special conditions, fiscal reports, payment logs, progress reports and correspondence. Includes contracts for leased space, contract insurance and bonds.	L+6 years then destroy	L = Life of Contract. Per AS 09.10.053 Statute of Limitations is 3 years for causes of action which accrued after August 7, 1997. (SLA 1997 Chapter 26, Sections 3 & 4. Silvers v Silvers, 999 P.2d 786, 790 n.4 (Alaska 2000).
5.3	Grant Administration Files		Per AS 09.10.053, statute of limitation is 3 years.
5.3.1	State	6 years then destroy	
5.3.2	Federal This series documents receipt of State or federal monies and consists of applications, copy of notification of grant award, agreement, special conditions, fiscal reports, closeout documents, reports (audit, status, progress & compliance) and correspondence.	C then destroy	C = Until federal audit is completed or 3 years after grant closeout, whichever is later. Refer to item #3.1 for financial documents relating to grants.
5.4	Grant Applications (Not Awarded) Applications that were not approved or funded.	1 year then destroy	
6. HUMAN RESOURCES ADMINISTRATION			
6.1	Individual Personnel Files Official employment history including applications; resume; personnel actions regarding hire, termination, and promotion; performance appraisals; results from employment tests; insurance		T = Termination of employment. Certain information is confidential.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	and benefits backup; family and medical leave act documentation; letters of commendation/reprimand; training certificates/history; driving records; drug/alcohol tests; service record card/employment history. Full Time Employees Regular Part-Time Employees Temporary and Casual Employees	T+50 years then destroy T+15 years then destroy T+10 years then destroy	
6.2	Recruitment, Selection & Appointment Records Consists of job applications, transcripts, recruitment notices, examinations, test answer sheets, score sheets, results, affidavits of publication and correspondence.	C+2 years then destroy	C = Date of Hire. Certain information is confidential.
6.3	Job Applications (Unsolicited)	Return to Applicant or Destroy	Certain information is confidential.
6.4	Master Examination Files Samples of each test or examination used in the selection and rating process of prospective employees, including answer keys.	C then destroy	C = Until superseded/obsolete or administrative need is met.
6.5	Organization Charts	C then destroy	C = Until superseded/obsolete or administrative need is met.
6.6	Salary Schedules	C then destroy	C = Until superseded/obsolete or administrative need is met.
6.7	Job Descriptions Description of specific duties for each position.	C then destroy	C = Until superseded/obsolete or administrative need is met.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
6.8	Job Class Specifications Minimum qualifications (knowledge, skills and abilities) required for each job classification or position. May list necessary education/certifications, examples of duties, salary, category of position and distinguishing characteristics.	C then destroy	C = Until superseded/obsolete or administrative need is met.
6.9	Classification/Reclassification Action Case Files Department action regarding specific positions/classifications.	C then destroy	C = Until superseded/obsolete or administrative need is met.
6.10	Grievance Case Files Documents grievances filed by employees against Departments. Consists of grievance forms, investigative notes, reports, correspondence and related backup.	C+5 years then destroy	C = Resolution and execution of any stipulations. Relates to "For Cause" employees rather than "At Will" employees. Certain information is confidential.
6.11	Contract Interpretation & Arbitration Decisions Includes exhibits, briefs and arbitrations relating to contract interpretation.	Retain Permanently	Relates to "For Cause" employees rather than "At Will" employees.
6.12	Training Course Files Consists of nominations, schedules with course information, and course evaluations from participants, correspondence and rosters.	3 years then destroy	
6.13	Training Course Development Files Course materials including audio/visual products, training aides, research materials, correspondence, and other media	C then destroy	C = Until superseded/obsolete or administrative need is met.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	etc. related to the development and/or presentation of training presentations.		
6.14	EEO Administration Records Includes quarterly utilization, compliance and annual reports; affirmative action plans; complaint case files; Departmental actions, and employment statistics.	10 years then destroy	Certain information is confidential per AS 18.80.115.
6.15	EEO Complaint Case Files Consists of records regarding discrimination charges, including documentation of the party making the charge and other employees/applicants in the same or similar positions; and, Departmental actions. Discrimination charges may be on the basis of race, color, religion, national origin, gender, etc.	C+7 years then destroy	C = Until complaint is resolved. Retention complies with Title VII of the Civil Rights Act of 1964. Certain information is confidential per AS 18.80.115.
6.16	Employee Medical Records Consists of on-the-job accident or illness/medical reports, lost time documentation, records used to monitor exposure, correspondence, etc. Includes employees exposed to blood-borne pathogens, formaldehyde, asbestos, mercury, or other hazardous substances.	Official Record Copy: T+30 years then destroy Duplicates: T+1 year then destroy	T = Termination of employment. Confidential per AS 40.25.120. 29 CFR 1910.1001
6.17	Hazard Communication & Material Safety Data Sheets Lists of hazardous chemicals present in the workplace and copies of material safety data sheets received with incoming shipments of chemicals and posted in the workplace.	30 years then destroy	Official Record Copy retained by receiving Department. 20 CFR 1910.1200; 1410.450

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
6.18	<p>Immigration Reform & Control Act (1986) I-9 Forms</p> <p>Employment Eligibility Verification forms retained by the Employer. All employees, citizens and noncitizens hired after November 6, 1986 complete Section 1; Employers complete Section 2.</p>	C+3 or T+1 then destroy*	<p>C = Date of hire.</p> <p>T = Termination of employment.</p> <p>* = Retain records for the longer period.</p>
6.19	<p>Alaska Human Rights Act Records</p> <p>Records of the age, race, and sex of all applicants for employment and all employees.</p>	2 years then destroy	AS 18.80
7. RISK MANAGEMENT			
7.1	<p>Insurance Policies & Endorsements</p> <p>This series includes insurance proposals, policies and endorsements, bonds, riders, correspondence, financial coding vouchers and billing information.</p>	C+50 years then destroy	<p>C = Until policy expires.</p> <p>The City Attorney will review all expired policies prior to destruction to determine if additional retention is required due to pending claims or litigation.</p>
7.2	<p>Risk Management Claim Files</p> <p>May include correspondence to/from claims adjusters, private attorneys, accident reports (property damage and personal injury) summary reports, payment orders/verification, pleadings/depositions and individual claim records.</p>	C+7 years then destroy	C = Until claim is settled and all legal aspects are resolved.
7.3	<p>Workers' Compensation Claims</p> <p>May include death, permanent total disability, time loss and no time loss cases. Documents</p>	C+40 years then destroy	C = Until case is inactive

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	include reports of injury/illness, medical reports, correspondence, legal filings, copies of Board decisions/order, compromise and release agreement, vocational rehabilitation reports/decisions, and Second Injury Fund reimbursements.		
8. ELECTION			
8.1	Voting Ballots (Completed, Challenged, Rejected, Absentee & Special Needs) May include applications.	C+1 Month then destroy	C = Until election is certified. If election is contested, retain longer per AS 15.15.470.
8.2	Certificates of Election Copies of election certificates presented to candidates upon verification of election.	4 years then destroy	
8.3	Certificates of Election Returns (Regular & Special) Consists of individual machine numbers; polling place designation; date of election; total votes registered by machine, candidate or referenda; and, signatures of elections inspectors, judges, administrators, clerks, volunteers.	Retain Permanently	Certain certificates that are duplicated elsewhere or do not have archival value may be disposed of after administrative need is met.
8.4	Election Registers & Tally Books Consists of the following registers: precinct, final voting, questioned voter, special needs voting and absentee voter. Also includes special needs voting applications.	4 years then destroy	Retain longer if election is contested per AS 15.15.470.
8.5	Election Contest/Runoff Information	C+1 year then destroy	C = Until election is certified.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	Contested election and runoff data.		
8.6	DOJ Preclearance Records This series includes request and pre-clearance for election.	Retain Permanently	DOJ = Department of Justice.
8.7	Declarations of Candidacy Declarations executed under oath including name, mailing address, office declared, residency length, etc.	4 years then destroy	AS 15.25.030
8.8	Financial Disclosure Statements	6 years then destroy	
8.9	Affidavits Documents voters requiring or requesting action or special accommodation during an election.	4 years then destroy	
8.10	Recount Petitions Candidate requests for recount of individual machine or paper ballot tallies. Includes candidates' reason for request.	4 years then destroy	
8.11	Candidates Lists Lists of candidates. Data includes: name and address of candidate, order in which they will appear on the ballot, office sought and term of office.	4 years then destroy	
8.12	Candidate Withdrawals Certificates of withdrawal. Includes candidate statement concerning reason for withdrawal.	4 years then destroy	
8.13	Election Officials' Records May consist of recruitment materials, interest letters, training notes, acceptance forms, oaths	4 years then destroy	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	and mileage reimbursement requests. Includes absentee voting officials' documentation.		
8.14	Voting District Descriptions, Maps & Street Books Descriptions of election precinct boundaries and maps indicating current voting district boundaries and numbers. Street books consist of alphabetical lists of streets (and house numbers where street encompasses more than one district) providing senatorial and representative numbers.	Retain Permanently	
8.15	Campaign Disclosure	6 years then destroy	
9. INFORMATION TECHNOLOGY			
9.1	Computer System Files		* = Tapes are rotated according to established IT procedures.
9.1.1	Backup Tapes	*	
9.1.2	Documentation File Documentation file may include: program/system documentation, wiring records (specifications/drawings of building, cables or computer hardware connections) application software licenses/agreements, data systems and file specifications, security information (access requests/authorizations/logs, passwords), disaster recovery procedures, user guides, usage/inventory reports, backup procedures.	C then destroy	Backup tapes are stored offsite for security. C = Until superseded/obsolete or administrative need is met. System related data should be retained until the system is superseded/obsolete.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
9.2	IT Service Requests Requests for service from departments. Documents requestor, type of service requested and IT action.	3 years then destroy	
10. LEGAL			
10.1	Municipal Attorney Opinions Consists of official and informal positions regarding legal issues affecting Departments or the City Council. May include information/action memoranda regarding ordinances, resolutions and vetoes.	Retain Permanently	
10.2	Regulation Files Includes matters relating to local legislation in which the City or City Council has an interest or has been involved.	10 years then destroy*	* = Review for archival value.
10.3	Litigation Case Files This series documents City action in civil and criminal cases. Includes briefs, pleadings, investigative materials, court proceedings, transcripts, correspondence, exhibits, photographs and other media.	C+6 years then destroy	C = Until case is closed.
10.4	Investigation & Matters Files This series documents investigations that are not prosecuted. Includes work papers, analyses, evidence, final reports, requests for legal opinions, research notes, correspondence, photographs and other media.	C+6 years then destroy	C = Until investigation concludes.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
10.5	Franchises Official authorization granted to a private entity to provide public utilities or services within the jurisdiction of the City.	T+6 years then destroy	T = Until franchise is terminated.
10.6	Right of Way & Easement Files Grant of easement records for legal permission to conduct work on private property, including, but not limited to, laying, constructing, maintaining, operating, repairing and servicing water and sewerage pipes, mains, drains, signs and utilities. Also vacations, descriptions of easement areas, diagrams, plans, agreement, memoranda, correspondence and property disposition.	Retain Permanently	Engineering or Parks & Recreation Departments may also administer the Official Record Copy.
10.7	Notice to Comply and/or Violation Reports	3 years then destroy	
11. PUBLIC SAFETY			
11.1	Police Reports (Major & Minor) Records complaint, report and follow-up for the following: felonies (which may include property records; arrest, court, processing, disposition and consent to search documents, witness/Miranda rights statements), motor vehicle accidents with injuries, missing person (unsolved), misdemeanors, abandoned vehicles/structures, breathalyzer use, domestic violence,	10 year then destroy	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	accidental/unexplained death, escapes.		
11.2	<p>Field Interrogation Cards</p> <p>Name and identifying data regarding persons questioned in the field, location, comments and disposition. May include vehicle, NCIC checks and information used for analytical purposes.</p>	5 years then destroy	NCIC = National Crime Information Center.
11.3	<p>Investigation Case Files</p> <p>Detectives' working papers of cases under investigation. Contains polygraph, surveillance and crime lab reports; latent fingerprints; photographs and other media; and, copies from Police Reports (item #11.1).</p>	Retain Permanently	
11.4	<p>Arrest Records</p> <p>Cumulative information for each adult arrested including booking documentation (name, arrest booking/AST number, address, date of birth, sex, occupation, physical description, offense, complaint report and disposition of case), finger print cards, photographs (mug shots) processing reports, copies from Police Report files, investigation reports, witness statements, signed Miranda rights, evidence examination requests, property record, rap sheets, court, process and disposition documents.</p>	D or 10 years then destroy*	<p>D = Until person is deceased.</p> <p>* = Retain records for the longer period.</p>
11.5	<p>Use of Force Investigations</p> <p>Investigations on the application of physical or deadly force. May include copies from complaint report file, inquiry and findings.</p>	7 years then destroy	Final report in Human Resources file

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
11.6	Property Records Individual record of property/evidence taken into custody. May include date, names, addresses, signatures, description, serial numbers, condition, location/bin, complaint report number, comments and disposition.	C+3 years then destroy	C =Until case is adjudicated and cleared.
11.7	Stolen Property Lists Received and internally produced lists and printouts of lost, stolen, found, pledged or pawned property.	10 years with case file	
11.8	Criminal Background Checks May include polygraph tests, FBI checks, interviewer notes, etc.	1 year then destroy	
11.9	Juvenile Arrest Files Cumulative information file on each juvenile arrested. May include processing report, cover and face sheet, copies from complaint report files, investigation reports, property records, witness statements, signed Miranda rights, Family Court petitions, court process and disposition documents.	10 years	Records must be kept separately from adult arrest records.
11.10	Juvenile Prosecution Case Files Case files prepared for purposes of prosecution. Includes copies from Arrest files.	10 years	
11.11	Abused/Neglected Child Notification Reports from the DFYS or the ACS of suspected cases of child abuse, endangerment or neglect. May include cover letter, investigative worker's	3 years then destroy	DFYS = Division of Family & Youth Services. ACS = Alaska Court System.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	observations/recommendations, and investigation summary.		
11.12	Holding Facility Records		A = Until audit is completed.
11.12.1	Prisoner's Personal Property & Inspection Records (relating to inspection of security, health and safety systems such as fire detection/suppression, sanitation, security and first aid.)	3 years then destroy	
11.12.2	Meal Records/Food Receipts & Housekeeping Records.	A+1 year then destroy	
11.13	Radar Reports May include certification of calibration, routine radar check reports, and certification of accuracy for tuning forks.	C+2 years then destroy	C = Until equipment is disposed.
11.14	Uniform Crime Report (UCR) Monthly account of offenses and stolen/recovered property values sent to the Alaska State Troopers.	5 years then destroy	
11.15	Crime Statistics Statistical compilations of crimes committed within the local jurisdiction.	Retain Permanently	
11.16	Accreditation Files Standards, goals and objectives, status and progress reports, and other documentation relating to accreditation and review for maintaining accreditation.	C then destroy	C = Until superseded/obsolete or administrative need is met.
11.17	Animal Control Files May consist of the following: licenses, animal complaint notifications/citations, description of animal, notification to owner,	3 years then destroy	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	certification of ownership, owner claims, release of animal data, dog bite reports and statistical reports. Also spay/neuter, euthanasia, vaccination, patrol, and abuse/cruelty information.		
11.18	Fire Investigation Files Record of fire department investigations of suspicious or incendiary fires. May include reports (fire, rescue, investigators, State Fire Marshal, police, casualty, insurance), video evidence (photographs, video cassettes, cd's), memoranda, diagrams, or other documentation relating to investigation.	C+30 years then destroy	C = Until investigation is closed.
11.19	EMS & Fire Incident Reports Reports of any incident that involved Emergency Medical Services, or calls to the Fire Department	10 years then destroy	
11.20	Minors as patients If patient is under 19 years of age, must keep 2 years after they reach 19, plus 10 years	T + 12	T + 19 years of age
11.21	Fire Inspection/Compliance Files This series documents fire safety inspection before and after building construction is completed. May include building plans used in inspection/approval process detailing fire detection specifications or other <i>Fire Safety Code</i> compliance requirements, certificates of inspection, violation appeals, Department response, surveys and applications for	C then destroy	C = Until building is no longer in use. Retain building plans until <i>Certificate of Occupancy</i> is issued and plans are of no further administrative value.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	variances.		
11.22	<p>Permits/Licenses Issued</p> <p>Applications and permits issued by local fire authority and/or City Clerk. May include open burn permits, permits relating to fireworks and so on.</p>	C+3 years then destroy	C = Until permit expires.
11.23	<p>Variations</p> <p>Variations issued by the City.</p> <p>Note: Variations may form part of Fire Inspection/Compliance Files (item #11.21)</p>	L then destroy	L = For life of the building or until occupancy classification is legally changed.
11.24	<p>Violation/Complaint Files</p> <p>Record of violations and complaints relating to the <i>Fire Safety Code</i>. May include name, time, address, location of violation/complaint, complaint summaries, investigation reports, disposition and Department follow-ups.</p>	C+3 years then destroy	C = Until resolution of complaint.
11.25	<p>Fire & Rescue Response Dispatch Tapes</p> <p>Audio tapes of incoming calls and outgoing dispatch instructions.</p>	30 days then destroy*	* = Then re-use tapes.
11.26	<p>Fire & EMS Training Files</p> <p>Consists of correspondence, course descriptions, training dates and exam results.</p>	T+10 years then destroy	T = Until termination of employee or volunteer no longer active.
11.27	<p>Fire Prevention Education Programs</p> <p>Multimedia materials used in fire</p>	C then destroy	C = Until superseded/obsolete or administrative need is met.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	prevention education including brochures, films, cd's, posters, pamphlets and other program resources.		
11.28	Fire & Rescue Response Circuit/Radio Box Records		L = Life of system.
11.28.1	Test Logs	1 year then destroy	Records Maintained by Public Works Department.
11.28.2	Alarms Records Record of alarm response tests conducted on all circuit, radio and location alarm boxes to ensure proper alarm signals are being received. May also include maintenance records and inspection/testing records for individual alarm systems including systems testing and certification documentation, inspection records, service contracts and reports, permits, diagrams, site information, emergency contact lists and correspondence.	L then destroy	
11.29	Equipment Inspection Records		
11.29.1	Records of inspections for vehicles, mechanical systems, hoses, hydrants, ladders (ground and aerial), mask service information (model, serial number, purchase date, type, cubic feet of tank and service record.	15 years	
	Self-Contained Breathing Apparatus (SCBA) inspection records, hoses, masks, and ladder inspection.	15 years	
11.30	Apparatus Accident Files Department record of accidents involving municipal fire/rescue vehicles. May include police	3 years then destroy*	* = Retain longer if involved in litigation. Consult with City Attorney prior to disposition.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	reports, witness statements, memoranda, diagrams, photographs and related documentation.		
11.31	<p>Fire Hydrant Identification Files</p> <p>Record of individual fire hydrants in service. Data may include identifying characteristics of each hydrant including location, date installed, size of lead, make, number of turns to open, size of main.</p>	C then destroy	<p>C = Until hydrant is no longer in service.</p> <p>Records maintained by Public Works Department.</p>
11.32	<p>Oil Spill Preparedness Files</p> <p>Includes information related to oil spill drills, incidents and inspections.</p>	6 years then destroy	
11.33	<p>Hazardous Materials/ Hazardous Substances Right To Know Files</p>		C = As long as the employer does business in the City.
11.33.1	Annual Updates	3 years then destroy	USDOL = United States Department of Labor.
11.33.2	<p>All other records</p> <p>Consists of detailed product/chemical identification listings supplied annually by individual employers that hold, use, or sell products considered hazardous by the USDOL, DOSH. This series may include USDOL forms or material safety data sheets, emergency and hazardous chemical inventory forms, company emergency plans, inspection reports, or other mandated documentation relating to hazardous substances.</p>	C+7 years then destroy	DOSHS = Department of Occupational Safety & Health.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
11.34	<p>Hazardous Materials Incident Files</p> <p><u>Major Incidents</u> Incidents or spills that require mitigation and reporting to State and/or Federal Agencies.</p> <p><u>Minor Incidents</u> Carbon monoxide, ammonia, or natural gas sniffer reports. Minor oil or gas spills that do not result in ground saturation or require reporting to State and/or Federal Agencies.</p>	<p>Retain Permanently</p> <p>10 Years</p>	May Include hazardous incident reports, copies of fire/rescue reports, narratives, and memoranda.
11.35	Contingency & Emergency Services Plans	Retain Permanently	
12. PLANNING, ZONING & COMMUNITY DEVELOPMENT			
12.1	Planning Commission Files		This series documents official actions of the Planning Commission, including Conditional Use Permits, Subdivision Preliminary Plats, Variances, design criteria manuals, master road and street plans.
12.1.1	Approved Proposals	Retain Permanently	
12.1.2	Denied & Withdrawn Proposals	3 years then destroy	
12.2	<p>Planning & Zoning Enforcement Case Files</p> <p>Documents regarding violations of planning and zoning regulations.</p>	C+6 years then destroy	C = Until resolution of the case.
12.3	Property Inventories	Retain until superseded	Updated annually
12.4	<p>Zoning Permits & Plans</p> <p>Zoning Permits</p> <p>Storm Water Plan</p>	<p>Permanent</p> <p>Permanent</p>	Permits & Plans addressed by Planning Department Staff

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	<p>Nonconforming Determinations</p> <p>Flood Plain Development Permits</p> <p>Sign Permit</p> <p>Development Activity Plan</p>	<p>Permanent</p> <p>Permanent</p> <p>L</p> <p>C + 2 Years</p>	<p>L = Life of Sign</p> <p>C = Completion of Construction</p>
12.5	<p>Land Management Case Files</p> <p>Documents management of lands. Files may relate to acquisitions, sales, leases, management agreements, letters of entry, timber/resource sales, etc.</p>	C+10 years then destroy	<p>C = Until case is closed.</p> <p>If case files subject to potential litigation, retain until file no longer has legal value.</p> <p>Some files may have permanent archival value.</p>
12.6	<p>Flood Control Program Files</p> <p>Includes erosion control studies, flood plain data, correspondence, maps and drawings documenting flood/erosion areas and specific problem parcels.</p>	C then destroy	C = Until superseded/obsolete or administrative need is met.
12.7	Zoning Map	Retain Permanently	
12.8	<p>Plans, Maps & Record Drawings</p> <p>Plans, record drawings, maps and as-builts including, but not limited to, City buildings, streets, survey/plat, lot plans, tax assessment, layout/grade, sanitary sewers, , easements, landfills, subdivisions, traffic control, water and fire lanes.</p>	Retain Permanently	<p>Logs or registers of plans, maps and drawings should also be retained permanently.</p> <p>Reference copies may be disposed after all administrative need is met.</p>

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
13. ENGINEERING, BUILDINGS & PUBLIC WORKS			
13.1	<p>Construction Project Files</p> <p>Consists of specifications, contracts, plans, bids, evaluations, performance bonds and correspondence documenting solicitation, selection, award/administration of contracts and professional service agreements. May include field reports, job accounting information, contract modifications, data relative to utilities and project close-out information.</p>	C+6 years then destroy	<p>C = Until project is completed.</p> <p>Refer also to item #5.1 (Procurement Records) & item #3.1 (General Accounting Records).</p>
13.2	<p>Engineering Field & Bench Mark Books</p> <p>Engineering field measurements, sketches, and diagrams including, but not limited to, elevations, distance, bench marks, ridges, easements, drainage, ponding, and core test holes.</p>	Retain Permanently	Reference copies may be disposed after all administrative need is met.
13.3	<p>Permit Application Files</p> <p>Permits include: Construction, Building, Utility, Drinking Water (facilities), Railroad, Waste Water Disposal.</p> <p>May consist of applications, copy of permit, maps, site plans/plats, specifications, drawings, engineer/architect's certification, as-builts, inspection reports, accounting data, etc.</p>	C+6 years then destroy	C = Until permit expires.
13.4	<p>Inspection Files (Miscellaneous)</p> <p>Inspection reports including foundation, framing, electrical, plumbing and fire safety.</p>	6 years then destroy	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
13.5	Permits Register List of all permits issued by Engineering, Buildings & Public Works.	Retain Permanently	Refer to item #14.2 for non-construction permits.
13.6	Right of Way & Easement Files (Originals) Grant of easement records for legal permission to conduct work on private property, including, but not limited to, laying, constructing, maintaining, operating, repairing and servicing water and sewerage pipes, mains, drains, signs and utilities. Also vacations (including section line and deeds of vacation), descriptions of easement areas, diagrams, plans, agreements, memoranda, correspondence and property disposition.	Retain Permanently	
13.7	Subdivisions & Land Development Project Files		C = Until administrative need is met.
13.7.1	Approved	Retain Permanently	
13.7.2	Denied Applications Records documenting property subdivisions. May include applications, site plan review, check lists, inspections, diagrams, plans, plats, drawings, specifications, covenants, subsurface soils investigations, boundary surveys, memoranda and other analyses.	C then destroy	
13.8	Regulatory Compliance Files Records documenting compliance with state/federal requirements such as coastal resources management and freshwater wetlands. May include copies of applications for authorization to	C+3 years then destroy	C = Until project is completed.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	perform work, requests for preliminary determinations, wetlands determinations, complaints, notices of violations, plans/maps, notices of public hearings, correspondence and memoranda.		
13.9	Bridge Files Cumulative history file for bridges. May include memoranda, correspondence, newspapers clippings, reports, plans/specifications, materials lists, excavation permits, bridge deficiency /inspection reports and work orders.	C then destroy	C = Until superseded/obsolete or administrative need is met.
13.10	Work/Repair Requests & Complaints Requests for work or repairs initiated by citizen complaint or internally. Data may include name and number of complainant or requestor, location and type of work to be performed, dates and times of receipt/response.	3 years then destroy	
13.11	Maintenance Work Orders & Logs Record of work performed and completed related to electrical, sewer, gas, street or water systems. Data may include date, time, order number, location, description of work, authorization, names of staff performing work, itemized labor, equipment and material information.	3 years then destroy	
13.12	Facility Maintenance Files Includes all documents, files and data relating to operation of facility, including permits, utilities correspondence, bids, reports,	L or C then destroy	L = For the life of the facility. C = Until administrative need is met.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	proposals, accounting, problems and enabling legislation.		Official Record Copies of certain documents may be administered by other departments.
13.13	<p>Fuel Summaries & Receipts Fuel summaries record daily, weekly or monthly fuel dispensed. May include grade of fuel, pump locations, meter/stick readings, gallons delivered and total gallons consumed or oil/antifreeze disbursed. Fuel receipts (slips) record individual fuel intake. Data may include vehicle number/type; driver; meter readings; and, gallons of fuel, oil, or antifreeze received.</p>	A+1 year then destroy	A = Until audit is completed.
13.14	<p>Snow Plow Files Records relating to snow plow routes and activity. May include maps, routes, correspondence, logs, crew lists or other documentation relevant to snow removal.</p>	C then destroy	C = Until superseded/obsolete or administrative need is met.
13.15	<p>Tree Files Records relating to tree maintenance, planting and removals. May include correspondence, removal or planting schedules, copies of agreements, reports, proposals, pamphlets, maps, grant data, and records on pesticide use including public hearing notices and copies of applicators' licenses and certifications.</p>	3 years then destroy	
13.16	<p>Underground Storage Tank Records</p>		L = Life of the tank.
13.16.1	Registration and Certification	6 years then destroy	If records may be subject to potential litigation, retain

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
13.16.2	Maintenance and Repair History Documents registration and State certification.	L+6 years then destroy	permanently. AS 46.03.360-450; 18 AAC 75, 18 AAC 78 & 40 CFR 280.
13.17	Geologic Data Documents relating to slides, avalanches, borings/drainage, and other subsurface conditions including piling records.	Retain Permanently	
13.18	Sewer & Water Assessment Records Records relating to sewer and water connection assessments for tax purposes. May include location diagrams, inspections, measurements, photographs and abatements.	Retain Permanently*	* = If Assessor administers Official Record Copy, keep 3 years.
13.19	Sewer Location & Connection Records Records detailing sewer connections for individual properties and/or municipal sewer system. Includes location, diagram and address. May include system specifications, requests for location of sewer connections, surveys, sketches, inspection and work reports, and dye test requests and reports.	Retain Permanently	
13.20	Water Service & Valve Location Records Records detailing water service connections for individual properties and/or shared water system. Includes location, diagram, address, type, date connection established, lengths, make, size, curb stop, main or gate valve.	C then destroy	C = Until system is no longer in existence.

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
13.21	<p>Water System Monitoring Charts & Logs</p> <p>Graphs monitoring water distribution system including flow rates, pressure and elevation. Logs document water readings at individual pumping/meter stations including date, time, reading, number of gallons per minute, reader's name and remarks.</p>	5 years then destroy	
13.22	<p>Water System Repair & Maintenance Records</p> <p>Record of work performed and completed on individual water meters, connections and mains. May include meter number, manufacturer, readings, job descriptions, name, telephone number, locations, size and service number.</p>	3 years then destroy	
13.23	<p>Well Information</p> <p>Includes well boring and well logs.</p>	3 years then destroy	
13.24	<p>Water Testing Records</p> <p>Record of water testing and analysis conducted on water system. Records may include, but are not limited to, laboratory certificates of analysis; microbiological, sample analysis and other result reports; water supply summary sheet; monthly water quality logs; chain of custody forms; and, lead/copper/nitrate results.</p>		<p>C = Until last action taken with respect to the applicable violation.</p> <p>18 AAC 70</p> <p>18 AAC 72</p> <p>18 AAC 80</p>
13.24.1	<p>Lead & copper analyses, corrosion control sampling and source water treatment records.</p>	12 years then destroy	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
13.24.2	Chemical, organic/inorganic chemical, radiological and turbidity analyses, and sanitary system survey data.	10 years then destroy	
13.24.3	Records of action taken to correct violations of primary drinking water regulations.	C+3 years then destroy	
13.25	<p>Water Management Plans</p> <p>Plans mandated by Alaska Statute and regulated through the Alaska Administrative Code. Plans include, but are not limited to, Water Supply Management, Water Quality Protection and Wellhead Protection.</p>	Retain Permanently	
13.26	<p>Water Service Applications & Agreements</p> <p>Applications and agreements for water service and supply. Data may include name, address, plat/lot numbers, district service and meter numbers. Signed agreement of terms and service may constitute contract.</p>	C then destroy	C = Until superseded/obsolete or administrative need is met.
13.27	<p>Meter Reading Books & Cards</p> <p>Record of water usage for customers. Includes date of reading, reading figures, water consumed, meter number, size, manufacturer, owner, address and service number.</p>	6 years then destroy	
14. LICENSES			

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
14.1	Licenses & Permits (Non-Planning Related)		C = Until permit expires.
14.1.1	Approved	C+5 years then destroy	
14.1.2	Denied, rejected or withdrawn Includes itinerant merchant, mobile foods services, liquor license, gaming, public gatherings, animal, bicycle, charity collections or events, public facility use, etc.	1 year then destroy	
14.2	Permits Register List of all non-construction permits issued by Licensing Department.	30 years then destroy	
14.3	Sales Tax Registrations & Reports	3 years then destroy	
15. ASSESSMENTS			
15.1	Annual Tax Assessment Rolls Real and business property annual assessment rolls. Includes property description, assessed value of property and names/addresses of owners.	Retain Permanent	AS 29.45.160
15.2	Notices of Assessment Real and personal property assessment notices, including those undeliverable.	6 years then destroy	
15.3	Certification Files Consists of annual assessment roll certifications, including oil and gas lease properties, senior citizen, disabled, American veteran, and farm use, etc.	6 years then destroy	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
15.4	Tax Appeal Files Documents adjustment appeals made to the City. Includes written appeal, audio tapes and board certifications.	6 years then destroy	
15.5	Real Property Parcel Master File This series used to certify and document the assessed value of real property. Includes following exemptions: senior citizen, disabled American Veteran, Farm Use Deferment, Religious, Charitable, Educational.	Retain Permanent	
15.6	Section Land Files Includes full legal description and chain of title information for all land parcels in township, section and range. Includes nonconforming (illegal) splits.	C then destroy	C = Until superseded/obsolete or administrative need is met.
15.7	Personal Property Files This series used to certify and document the assessed value of personal property. Includes certifications, declaration forms, and miscellaneous information attached to property assessment.	6 years then destroy	
15.8	Reports of Collection	6 years then destroy	
15.9	Building & Land Inventory Records This series documents new building construction and razing/renovation of older buildings; and, tracks land, subdivision, re-subdivisions, lot line removals, etc.	6 years then destroy	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
15.10	Market Sales Program Records Includes property acquisition questionnaires and market sales program information.	6 years then destroy	
16. LAND MANAGEMENT			
16.1	Land Township/Range/Section Files Includes deeds, easements, cadastral surveys, entitlement documents, City actions and other legal documents.	Retain Permanently	
16.2	Land Lottery Records Consists of financial reports, property pictures and land owner information.	Retain Permanently	
16.3	Municipal Entitlement Records History of land acquired from the State (selection, patent).	Retain Permanently	
16.4	Property Tax Foreclosure Records May include parcel inventory files and property acquired through tax foreclosure where repurchase rights have been extinguished.	Retain Permanently	
17. PARKS & RECREATION			
17.1	Recreation Program Records	3 years then destroy	
17.1.1	Program histories and photographs Records relating to programs and activities sponsored or developed by the Parks & Recreation Department. Included are sports programs , arts, charitable events, day camps, luncheons and picnics. Documents may consist of player rosters, sponsor forms,	Retain Permanently	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	practice notices, schedules, tournament seedings, permission slips, drop out forms, worker lists, brochures, flyers and correspondence.		
17.2	Coach/Instructor/Lifeguard Records Records relating to instructor, lifeguard, or coach certification and training. May include volunteer coach registrations, criminal background checks, reference and training videos, newsletters and other certifications.	C then destroy	C = Until superseded/obsolete or administrative need is met.
17.3	Recreation Facility Records Records relating to maintenance, compliance and monitoring of City facilities including community recreation buildings, pools, ice skating rinks, arenas and athletic fields. This series may consist of inspection certifications, use permits, facility applications and licenses.	Retain Permanently	
17.4	Maps, Plans & Drawings This series documents topographic features, drainage, structures, proposed enhancements, etc. for parks. Includes utility maps, easements and as-builts.	C then destroy	C = Until superseded/obsolete or administrative need is met. Official Record Copy may be administered by Engineering, Buildings & Public Works (item #13.1).
17.5	Horticulture Project Files Consists of records relating to landscaping, tree and flower work, including requests, design plans and work orders.	C then destroy	C = Until superseded/obsolete or administrative need is met.
17.6	Cultural Resources Records Documentation of the functions	Retain Permanently	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	and activities of the cultural resources officer. Includes case files, final reports, drawings, photographs, videos, plans, maps, etc.		
18. LIBRARIES & MUSEUMS			
18.1	Accession and De-Accession Records Cataloging records for each item put into collection. Records contain identifying, descriptive, and location information for each item.	Retain Permanently	
18.2	Circulation Records May include privileged patron information, circulation cards, overdue notices, circulation statistic reports, etc.	C then destroy	C = Until superseded/obsolete or administrative need is met. Confidential per AS 09.25.140, AS 40.25.140 (Confidentiality of Library Records).
18.3	Collection Development, Materials, and Information Systems Records of ordering, purchasing, and receiving.	C	C = Until superseded/obsolete or administrative need is met. Backup disaster recovery tapes are stored offsite for security. Tapes are rotated according to established repository procedures.
18.4	Inter Library Loan Records	C	C = Until superseded/obsolete or administrative need is met. Confidential per AS 09.25.140, AS

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
			40.25.140 (Confidentiality of Library Records).
18.5	Fine and Lost Item Reimbursement Accounting Records	7 Years then destroy	
18.6	Conservation Reports Series consists of artifact conservation records. Includes survey reports, treatment reports, treatment request reports, photos, slides and negatives.	Retain Permanently	
18.7	Library Volunteers	C	C = Until administrative need is met.
18.8	Patron Application Cards Regular Patron Cards Temporary Patron Cards	2 Years 1 Year	
19. Port & Harbor			
19.1	Port and Harbor Standard Operating Procedures	Retain Permanently	
19.2	Port of Homer Terminal Tariff	Retain Permanently	
19.3	Inspection Reports Specific to port and harbor areas and the spit. Harbor Officer daily logs, harbor check forms, Crane Inspection, OSHA, DEC Reports	7 years	
19.4	Receipts Includes Load and Launch Ramp and Parking Receipts	3 years	3.1 General Accounting Records
19.5	Stall Waiting List	3 years	

Item No.	Records Series Title & Description	Retention & Disposition	Remarks
	Stall Application and Renewals Stall Wait List Book	Permanent	
19.6	Terminal, Fish Dock, and Crane Use Permits	C+ 3 years	C= current year
19.7	Moorage Agreements Reserved Stall and Transient	C+ 3 years	C= current year
19.8	Wood (Steel) Grid Utilization Agreement	C+5 years	C = Term of Vessel Ownership
19.9	Billing Records Includes, but not limited to, dock & wharfage, electriCity, grids, crane and ice, application for metered power, notification of vacancy, storage, and marina	3 years	3.1 General Accounting Records
19.10	Geologic Data Records, Dredging Records	C	C= Until Superseded
19.11	Facility Security Documents	C then destroy	C= Until administrative need is met. Contains sensitive information and shredded on site

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