



CITY AND BOROUGH OF SITKA ALASKA

Records Retention Schedule

Version 2.0 (December 2023)

Prepared by:
CBS City Clerk's Division
In Conjunction with MG Consulting Services, LLC.

OVERVIEW

Pursuant to AS 29.20.380, the City Clerk's Office manages the City's Records Management Program, and the SGC 1.35.040 sets the requirements of the program. The goal of the Records Management Program is to manage records, regardless of format, from the time records are received or created throughout their lifecycle. A typical records lifecycle begins with creation, then moves to distribution, active storage, inactive storage, and ultimately ends with disposition which can either be destruction, permanent storage, or accession. To ensure transparent and efficient government operations, the City and Borough of Sitka's Retention Schedule strives to provide consistency and clear expectations regarding where a record is held, when it becomes inactive, how long the record should be kept for, and its final disposition action. Each department is involved in the creation and modification of the retention schedule, and the retention periods are determined based on staff/public needs, legal requirements, and State recommendations to continuously safeguard continuity of operations.

DEFINITIONS

1. Record Series: The unique identification number of the type of record.
2. Cutoff: The date/time at which the record closes and is considered inactive.
3. Retention: How long a record is kept for.

POLICY

Records and their proper maintenance are a matter of law and policy. City code provides the framework for the administration of the City's Records Management Program, the retention schedule is a tool to assist departments in compliance, and the Records Management Policy provides direction on how to correctly implement Records Management best practices. As of December 2023, the Records Management Policy is being drafted. Once completed, it will be referred to at this location.

USING THIS DOCUMENT

Please note the department associated with the record type is listed at the bottom of each page. Also, this document's text can be searched, so if you are looking for a specific record's retention, you may select Ctrl + F and enter in a key phrase to help you find what you are looking for. If you are looking at records within your department only, please remember that the more common record types are listed at the beginning of the document, under the CORE designation.

If you have any questions about what a record's retention should be, concerns about what you find within the schedule, or need any clarification please contact the City Clerk's office as a first point of contact.

APPROVAL

As of December 2023, this retention schedule has been approved by the Assembly Manager, the City Attorney, the City Clerk, and all Department Heads.



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
CORE 100	Daily Correspondence (not specifically related to a more formalized series)	Consists of original incoming, and copies of outgoing, letters and memoranda related to the general administration and operation of the agency. Includes the following types of correspondence: intra/inter-departmental, legislative, professional association, steering committee, and public. Also may consist of conference/training notes, organizational charts, delegations of authority, share campaign, inventories/logs, studies, service pin award data, etc.	End of Calendar Year	3 years then Destroy
CORE 105	Drafts and Review Files	This series contains documents, 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.	Until administrative need is met	Destroy Immediately
CORE 110	E-Mail and Attachments, Metadata, Voicemails converted to E-Mail, Text Messages, Telephone Messages converted to written records, Embedded Data and Metadata	E-Mail that is created or received on an Electronic mail system is subject to individual department records retention schedules and must be retained for the same period of time as the record series that most closely matches the subject matter contained with the e-mail and attachments. E-mails and their attachments that belong with a larger file (e.g. case file) should be saved as a pdf with the digital file.	End of Calendar Year	Permanent
CORE 115	Equipment Records	Delivery Order, Usage Reports, General Maintenance, Inventories, Warranty Information, Instruction/Operating Manuals, Repair/Maintenance History, etc.	Equipment no longer in use	4 years then Destroy
CORE 120	General Reports (not specifically related to a more formalized series)	Monthly, Statistical, Performance, Damage and Vandalism, Safety, Monitoring etc.	End of Calendar Year	3 years then Destroy
CORE 125	Historical Files	CBS departments written histories, newspaper articles, photographs, and speeches related to a specific topic/department of historical value should be retained within that file. <i>**Records have historical value if they document major policies, procedures, or historical activities.**</i>	12 Months Later	Permanent
CORE 130	In House Hazardous Materials (Safety Data Sheet)	Detailed records relating to product/chemical identification listing supplied annually by individual employers that hold, use, or sell products considered hazardous by the USDOL, DOSH.	Date Received	30 years then destroy
CORE 135	Meeting Files (Advisory Boards and Commissions) - Back Up Materials	Agendas, Agenda Packets, Audio, video and digital recordings of meetings, legal notices, etc.	12 Months Later	5 years then Destroy
CORE 140	Meeting Files (All) - Official Minutes	Records that constitute the official accounts of the proceedings and actions of the governing body, boards, commissions and committees.	12 Months Later	Permanent



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
CORE 145	Meeting Files (Decision Making Bodies - Assembly & Planning Commission) - Back Up Materials	Agendas, Agenda Packets, public hearing info, video and digital recordings of meetings, legal notices, etc.	12 Months Later	Permanent
CORE 150	Policies and Procedures - Major and Routine	Major: Substantive and binding agency issued policies, procedures, directives, decisions, orders, rules, guidance, agreements, understandings, and manuals that address mission essential functions for which the agency is statutorily responsible. Routine: agency issued policies, procedures, directives, decisions, rules, organizational charts, and manuals that address internal functions and operating procedures.	Remain Open until obsolete, superseded or administrative need is met.	Permanent
CORE 155	Public Records Logs	Log includes date of request, name of requester and other related information.	End of Calendar Year	2 years then Destroy
CORE 160	Public Records Requests and Responses	Includes written request for public records received.	Date Request is Fulfilled	2 years then Destroy
CORE 165	Reading Files	Copies of files as a reference. Maintained as a discrete records series, these files are used for various administrative purposes.	Until administrative need is met	Destroy Immediately
CORE 170	Technical Reference Files	Technical studies, newspapers and publications used in the administration of agency business.	Until administrative need is met	Destroy Immediately
CORE 175	Transitory and Miscellaneous Administrative Info	Include telephone logs, 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, forms, printing/stock requests, fuel inventory sheets and other indices. Also may consist of conference/training notes, organizational charts, delegations of authority, share campaign, inventories/logs, studies, service pin award data, etc.	Remain Open until obsolete, superseded or administrative need is met.	Destroy Immediately
CORE 180	Working Files	Includes documents that are constantly being edited or added to; copies of reports, studies or plans; copies of documents used for administrative purposes; files produced by outside agencies not created for Sitka.	Remain Open until obsolete, superseded or administrative need is met.	Destroy Immediately



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
ADM 100	Copies of Local Newspapers	Office copy of the Daily Sitka Sentinel.	Date Received	2 months then Destroy
ADM 105	General Fund Grant Applications and tracking documents (Grants awarded by Sitka)	General Fund Grant applications for non-profit organizations; and any other documentation produced by Sitka employees needed to conduct this program.	End of Fiscal Year	2 years then Destroy



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
AS 100	Annual Assessment	Real and business personal property assessment rolls and supplement rolls.	End of Calendar Year	Permanent
AS 105	Assessment Notices	Business/personal and real property notices, including exemption records.	End of Calendar Year	Permanent
AS 110	Assessment Appeals	Valuation appeal forms, records and accompanying information.	Appeal Period Over	Permanent
AS 115	Assessment – Real Property	Records pertaining to assessment of real property, including exemptions and real property photos.	End of Calendar Year	Permanent
AS 120	Assessment – Business/Personal Property	Records pertaining to assessment of business and/or personal property.	End of Calendar Year	Permanent
AS 125	Assessment – Market Data	Records include property acquisition questionnaires and market sales program information.	End of Calendar Year	Permanent
AS 130	Assessment Reports	Annual Assessor’s report, information studies, ratio and sales.	Calendar Yearly (CY)	Permanent



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
CLK 100	Affidavit of Publications	Records consist of any and all affidavits of newspaper publications.	End of Calendar Year	10 years then Destroy
CLK 105	Ordinances, Resolutions & Proclamations – Adopted/Issued	Records relating to charter, ordinances, resolutions and proclamations, amendments, code supplements, lists of all ordinances and resolutions, and articles of incorporation.	Date Adopted	Permanent
CLK 115	Election – Permanent	Certificates of Election Returns; Recount Petitions.	Election Certified Date	Permanent
CLK 120	Election – Ballots	Voted and unvoted ballots, ballot stubs, absentee and questions envelopes, applications, precinct registers, election certificates, absentee official records, petition signature booklets with original signatures; Registers and Tally books, Contest/Runoff Info; Candidates Lists, Candidates Withdraws.	Election Certified Date	60 days then destroy
CLK 121	Petitions	For initiatives, referenda and recall filed by private citizens or groups requesting governing body action.	Petition Date	Permanent
CLK 125	Election – General	Declarations of Candidacy, Public Official Financial Disclosure Statements, other generalized election files that have retention value.	Election Certified Date	6 years then Destroy
CLK 126	Incorporation Files	Documents incorporation records series not found elsewhere on this schedule (petitions, public hearings, etc.). May include information related to investigations, decisions, municipal logo and official municipal seal.	Incorporation Date	Permanent
CLK 130	Annexation Files	Petitions, correspondence, copy of ordinance and related public hearing backup records.	Annexation Date	Permanent
CLK 133	Contract Administration	Records consist of notification of award, original contract, and amendments or renewals, special conditions, fiscal reports, payments, progress reports, contract insurance and bonds.	Contract End Date	6 years then Destroy
CLK 135	Municipal Code	The Assembly Code is a living document comprised of all adopted ordinances.	Living Document, never closes	Permanent
CLK 140	Licenses & Permits - Approved (Not Business Licenses)	Records relating to public gatherings, events rejected liquor licenses, ABC applications.	Permit Expiration Date	3 years then Destroy
CLK 155	Records Destruction Certificates	Certificates of Records Destruction documenting when CBS records have been destroyed.	Date of Log	Permanent
CLK 160	Records Retention Schedule	Retention schedule for all departments.	Date Adopted	Permanent
CLK 165	Notice of Adoption - Legislation	Notice published in the paper re: Ordinance/Resolution Adoption.	Adoption Date	1 year then Destroy
CLK 166	Oaths of Office and Appointments	This series may consist of oaths for boards, commissions, committees, councils and other elected/appointed officials; and, affirmations, acknowledgements, notices of appointments/resignations, lists of members with terms and dates of appointment.	Date Oath Signed	Permanent
CLK 170	Officials' Bonds	Bonding documents for Staff and Elected Officials.	Bond Expiration	7 years then Destroy



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
CLK 174	Conflict of Interest Statements	Statements for elected/appointed municipal officers and employees.	End of Term for Individual	6 years then Destroy
CLK 175	Board of Equalization Records	Appeals and accompanying information.	End of Calendar Year	Permanent



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
FD 100	Contingency & Emergency Services Plan (Emergency Operations Plan and Annexes)	Records detailing operation protocols during emergencies.	Until obsolete or Superseded	Permanent until superseded
FD 105	EMS Electronic Health Record/Run Report/Patient Care Report (PCR) - involving 18+	Ambulance Report, Dispatch Report, Face Sheet, PCS, ABN, DNR, ECG, ETC.	End of Calendar Year	7 Years then Destroy
FD 110	EMS Electronic Health Record/Run Report/Patient Care Report (PCR) - involving minors 17 and under	Ambulance Report, Dispatch Report, Face Sheet, PCS, ABN, DNR, ECG, ETC.	End of Calendar Year	7 years then destroy - OR - 3 years past 18th birthday then destroy (whichever is longer)
FD 115	Equipment Inspection Reports	Records of inspection for hoses, (water dept), ladders, SCBA Service information, Rope log; model, serial number, purchase date, type, etc.	Date obsolete, superseded or administrative need is met	Destroy Immediately
FD 120	FD Volunteer Member Files	Training Files, Medical Files, Certifications, Licenses, Application, Correspondence, Disciplinary for Volunteers.	Termination of Volunteer or date no longer active	6 years then Destroy
FD 125	Fire Marshall records	Inspections, Variance, Violations – Building related records; Files for all commercial buildings served by Fire Dept. Files include fire system certification reports, Notices of Hazard, and approved extensions to orders.	End of Calendar year	Permanent
FD 130	Hazardous Material Incident Files	Records of hazardous material incidents. May include reports, copies of fire/rescue reports, narratives, memoranda.	End of Calendar Year	Permanent
FD 135	Incident Reports Fire & Search and Rescue (SAR) & Dive Rescue	All documentation and data pertaining to incidents responded to. They may include pictures, mission profile, personnel docs, apparatus, etc.	End of Calendar Year	Permanent
FD 140	Log Book	Daily call logs.	End of Calendar Year	Permanent
FD 145	Vehicle Daily Inspection Log	May include daily checklists, inspection reports, etc.	End of Calendar year	1 year then destroy
FD 150	On-Site Employee Records	Records detailing Fire and/or EMS certifications; vaccination records; various exposure records.	End of Calendar year	Fire: Permanent EMS: Permanent until superseded



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
FIN 100	Accounting – Bonds	Records related to Bonds and Bond Registers (see FIN 175 for Insurance Bonds).	Bond Paid Off Date	20 years then Destroy
FIN 105	Accounting – Fixed Asset Schedule	Inventories of owned assets indicating value, location, purchasing information, etc. Listing of fixed Assets and depreciation of those assets.	Living Document; no close date	Permanent
FIN 110	Accounting – Grants	Grant administration records, including Files containing documents relating to receipt of grants or loans from federal, state, or other entities and consists of applications, grant awards, agreements, special conditions, fiscal reports, closeout docs, (reports that include audit, status, progress, compliance) and correspondence.	Close out Date or (if fixed asset) Disposal of Asset Date	10 years then Destroy - Unless required to keep longer
FIN 115	Accounting – Property Tax Foreclosure	Records related to foreclosures, delinquency reports, billings, confession of judgments, promissory notes, and certified mailings.	Case Closed Date	10 years then Destroy
FIN 120	Accounting - Revenue	Daily transaction reports and cash receipts, deposit slips, debt service payments, utility stubs.	End of Fiscal Year	4 years then Destroy
FIN 125	Accounts Payable	These records may include check copies, audit work files, invoices and purchase orders, AP Batches, travel accounting.	End of Fiscal Year	6 years then Destroy
FIN 130	Accounts Receivable	Records relating to receipt of revenues, may include; tax and, exemption records, deposits, charges, utility adjustments, refunds and allocations.	End of Fiscal Year	5 Years then Destroy
FIN 135	Annual Comprehensive Financial Report	Final Financial Comprehensive Report.	End of Fiscal Year	Permanent
FIN 140	Application for Utility Services	May consist of applications, copy of permit, specifications, etc.	Service end date	6 years then Destroy
FIN 145	Bad Debts/Collections	Records related to the monitoring, collecting and writing off of bad debts. Includes authorizations, supporting details of uncollectible accounts.	Last Payment/Write-Off Date	6 years then Destroy
FIN 150	Bills of Sale	Official Documentation of sales transactions between the city and buyer.	End of Fiscal Year	7 years then Destroy
FIN 155	Budget Working Files	Budget instructions, submissions, backup documentation, cost allocations, annual estimates of revenue and amendments.	End of Fiscal Year	5 Years then Destroy
FIN 165	Final Approved Budgets	Final Approved Budget Document.	End of Fiscal Year	Permanent
FIN 170	Financial Medical Record Payment Files	Records documenting payments for Worker's Compensation, On-the-job accidents, reports, lost time, disabilities, etc.	Separation Date	50 years then Destroy
FIN 175	Insurance - Financial Records	Includes insurance bonds, riders, correspondence, financial coding vouchers and billing information.	Policy End Date	6 years then Destroy
FIN 180	Investment Records	Signatory forms, formal communication to transfer funds; investment statements.	End of Fiscal Year	4 years then Destroy
FIN 185	Journal Entries	General Revenue and Expenditure, liabilities and assets.	End of Fiscal Year	10 years then Destroy



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
FIN 190	LID's	Local Improvement Districts including posting, certificates of mailing, notices of assessment, bid quotes, reports, awards.	12 Months Later	Permanent
FIN 195	Original Bank Statements	Bank statements/reconciliation, stale/abated checks.	End of Fiscal Year	7 years then Destroy
FIN 200	Payroll – Federal and Tax Documentation	W-2, W-3, W-4 Forms, Documents related to federal withholding tax statements; Federal tax Payment documentation; Quarterly 941 reports, Internal Revenue Service Reports and Reconciliations (1099R, 945).	End of Fiscally Year	6 years then destroy
FIN 205	Payroll – Personnel/Employee Pay Records	Records related to wages, salaries, garnishments, adjustments, court orders, deductions and benefits and Documents representing gross earnings, deductions and net pay for each employee. Records includes: pay day registers, personnel orders, PERS/SBS Reports, Pay Step Increases, etc.	Separation Date	Permanent
FIN 210	Payroll - Timesheets	Records relate to reporting of hours worked and leave used.	End of Fiscal Year	3 years then Destroy
FIN 215	Payroll Reports (Payroll Liability Payments)	Supplemental Benefit Deductions.	End of Fiscal Year	6 years then Destroy
FIN 220	Property Tax	Records consist of copies of property tax bills and payments.	End of Fiscal Year	6 years then destroy
FIN 225	Sales Tax Appeals(/Adjustment)	Informal/Formal - Documents adjustment appeals made to the assessment review board. Includes written appeal, recordings, and board certifications.	Resolution Date	7 years the Destroy
FIN 230	Sales Tax Audits	Records include sales tax and/or bed tax, daily transactions, reconciliations, deposit summaries, wholesale/retail, government supported non-profits, audits, quarterly returns, collection files, promissory notes, confession of judgments, civil and small claims court filings. etc.	Merchant Closed Date	3 years then destroy
FIN 235	Sales Tax Registration/Business Registration Forms	Records consist of documents pertaining to sales tax registration for businesses.	End of Fiscal Year	7 Years then Destroy



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
HAR 100	Logs - Daily Activity Log & Daily Maintenance Log	Records consist of complaints, emergency responses, warnings, citations, and any other information relating to individuals within CBS harbors; Logs related to the building and repairs of CBS Harbors.	End of Calendar Year	3 years then destroy
HAR 105	Moorage Records	Records include tenant wait list, individual moorage records, etc.	End of Calendar Year	3 years then destroy
HAR 110	Stall Assignment & Wait List	Record of all persons/boats that have signed up for a moorage stall and where they are on the list.	End of Calendar Year	Permanent



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
HR 100	Alaska Human Rights Act Records	Records documenting the age, race, and sex of all applicants for employment and all employees.	End of Calendar Year	2 years then Destroy
HR 105	Classification/Reclassification Action Case Files (that are not employee specific)	Department action regarding position classifications and reclassifications.	Date Matter Resolved	6 years then destroy
HR 110	Collective Bargaining Negotiation Files	File set consists of letters of understanding, tentatively approved articles within the contract, proposals and counter proposals, exhibits, briefs, and arbitrations relating to contract interpretation. (NOTE: does <i>not</i> include handwritten notes, research from outside agencies, and other working files created in conjunction with bargaining).	Date of Expiration	Permanent
HR 115	EEO Administration Records	Includes quarterly utilization, compliance and annual reports; affirmative action plans; complaint case files; Departmental actions, and employment statistics.	End of Calendar Year	10 years then destroy
HR 120	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.	Date Case Resolved	7 years then Destroy
HR 125	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.	Employee Separation Date	30 years then Destroy
HR 130	Individual Personnel Files	Official employment history including applications; resume; personnel actions regarding hire, termination, and promotion; performance appraisals; results from employment tests; insurance and benefits backup; family and medical leave act documentation; letters of commendation/reprimand; employee specific reclassification requests; training certificates/history; grievance files; driving records; I-9 Forms; drug/alcohol tests.; workers comp claims	Employee Separation Date	50 years then destroy
HR 135	Job Applications (Unsolicited)	Resumes or other application documentation that is sent to CBS without solicitation.	End of Calendar Year	1 year then destroy
HR 140	Job Descriptions	Description of specific duties for each position; may include minimum qualifications, necessary education/certifications, examples of duties, etc.	Retain until obsolete, superseded or administrative/management need is met.	2 years then Destroy
HR 145	Organization Charts	Reference records documenting the organizational structure of the city and borough.	Retain until obsolete, superseded or administrative need is met.	Destroy Immediately
HR 150	Recruitment Records - Administrative Documents	Recruitment notices, test answer sheets, and other administrative files related to recruitment.	Date Position Filled	4 years then Destroy
HR 155	Recruitment Records - Applicant Not Selected	Consists of job applications, transcripts, examinations, results, and correspondence with any applicant who is not selected.	Date Position Filled	4 years then Destroy



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
HR 160	Salary Schedules/Staffing Table	Reference copies of employee pay schedules.	Retain until obsolete, superseded or administrative/management need is met.	Destroy Immediately
HR 165	Training Course Files	Consists of nominations, schedules with course information, course evaluations from participants, correspondence and rosters. Records consist of course materials, audio/visual products, training aides, research materials, correspondence, and other media related to the development and/or presentation of training presentations.	Date of Course	3 years then Destroy
HR 170	Unfair Labor Practices Case Files	Consists of the complaint, correspondence, notice of hearing, hearing transcripts and exhibits, witness lists, audio and/or video tapes, and a copy of the final decision and order. Also includes case dismissed, withdrawn or settled.	Date Matter Resolved (case closed, dismissed, withdrawn, or settled)	Permanent



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
IS 100	Computer System Files	Records 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/log, passwords), disaster recovery procedures, user guides, usage/inventory reports, backup procedures; and, Web page data, statistics and other development materials utilized in the creation/maintenance of CBS Internet site.	System related data is retained until the system is obsolete or replaced. All other records should remain open until obsolete, superseded, or administrative need is met.	Destroy Immediately
IS 105	End User License Agreements (EULA)	Form signed by employee agreeing to license.	Until subscription service or software becomes obsolete or replaced	Destroy Immediately
IS 110	Service Requests	Records that are requests from CBS departments. Information includes requestor, type of service requested and IS action.	Remain Open until obsolete, superseded or administrative need is met.	Destroy Immediately
IS 115	Surveillance Video Tapes	Records consist of surveillance video created to monitor activities occurring both within and outside of CBS public buildings.	End of Day	90 Days then destroy



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
LEG 100	Investigation, Action, and Matters Files (Litigation Case Files)	Law suit files, Collection related claims, and Potential or unasserted claims containing actions by CBS or against CBS, includes records related to settlements, court orders, pleadings, discovery attorney/work-products, legal opinions, transcripts, media, exhibits, photographs, final judgments, settlements, and other documents specifying terms, conditions, and decision related to litigation.	Date investigation, case, or matter concludes	10 years then Destroy
LEG 105	Legislation Development Files	Documentation of the analysis and development of ordinances and/or resolutions.	Date investigation, case, or matter concludes	7 years then Destroy
LEG 110	Municipal Attorney Opinions	Records of official and informal positions regarding legal issues affecting CBS.	Date investigation, case, or matter concludes	Permanent
LEG 115	Planning and Zoning Code Enforcement Files	Records relating to any legal action taken regarding the enforcement of planning and zoning regulations.	Date investigation, case, or matter concludes	Permanent



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
LIB 100	Circulation Records	Records may include privileged patron information, circulation accounts, overdue notices, etc.	Remain Open until obsolete, superseded or administrative need is met.	3 years then destroy
LIB 105	Local History	Local historical items including the C.L. Andrews Collection; obituaries, volunteer research, local history vertical files, microfilm/fiche; cemetery maps.	Date Accessioned	Permanent
LIB 110	MARC Catalog records	Records documenting library accessions and may include date purchased, amount, publisher, classification code, detailed descriptions, etc.	Remain Open until obsolete, superseded or administrative need is met.	Destroy Immediately
LIB 115	Reference Resources	Resources used for staff research and reference purposes.	Remain Open until obsolete, superseded or administrative need is met.	Destroy Immediately



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
PD 100	Abused/Neglected Child Notification	Records consist of reports from DFYS or the ACS of suspected cases of child abuse, endangerment or neglect. Records may also include cover letter, investigative worker's observations/recommendations, and investigation summary.	End of Calendar Year	3 years then destroy
PD 105	Animal Control Files	Records may consist of licenses, animal complaints, notifications, citations, description of animal, notification to owner, certification of ownership, owner claims, release of animal data, dog bite reports and statistical reports, spray/neuter, euthanasia, vaccination, patrol, and abuse/cruelty information.	End of Calendar Year	3 years then Destroy
PD 110	Arrest Records	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.	End of Calendar Year	10 years then Destroy
PD 115	Complaint Cards	Record of complaints to police/public safety officer. Record includes data relating to reporting party, location and nature of incident, time and dispatch information and disposition.	End of Calendar Year	2 years then Destroy
PD 120	Confidential Informant Records	Records may include number assigned to informant, informant and case officer names, reference to origins of the contact, reports of information supplied by informant, and expenditure/payment records.	Termination Date of Informant	7 years then destroy
PD 125	Criminal Background Checks	Criminal background checks done as a consequence of requests from employers or local government requirements. Records may include polygraph tests, FBI checks, interviewer notes, etc.	Date of Background Check	1 year then destroy
PD 130	For Hire and Tourism Permits	Transportation permits, chauffeur permits, food cart permits.	Permit Expiration Date	6 years then destroy
PD 135	Holding Facility Records	Records consist of prisoner's personal property and inspection records (relating to inspection of security, health and safety systems such as fire detection/suppression, sanitation, security and first aid.)	End of Calendar Year	4 years then Destroy
PD 140	Internal Affairs Investigations	Investigations of complaints of alleged officer misconduct. Records may include reports, correspondence, statements, investigation documentation, findings and disposition.	Matter Resolved	7 years then destroy
PD 145	Investigation Case Files	Detectives' working papers of cases under investigation. Records contain polygraph, surveillance and crime lab reports; latent fingerprints; photographs and other media; and, copies from Police Reports.	Date Investigation Concludes or Goes Cold	Permanent



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
PD 150	Logs/Indices, Reports/Miscellaneous	Records may include the following type of logs/indices: radio/dispatch, tape control, patrol, officer/cruiser, detective, arrest booking, mug shot, missing person, Grand Jury, NCIC inquiry, evidence, juvenile arrest, administrative (documenting time in court, educational activities, assisting another officer) overtime, weather, staffing/daily roster, daily assignment, unit, property recovery, radar, weapon, animal report, accident and towed vehicle.	End of Calendar Year	5 Years then Destroy
PD 155	Outstanding Warrants	A list of outstanding arrest warrants. Records may include name, date of birth, address, offense code, case number, warrant date, status, charging section.	Remain Open until obsolete, superseded or administrative need is met.	Destroy Immediately
PD 160	Police Reports (Major & Minor)	Records related to the complaint, report and follow-up. Report types may include felonies (which may include property records; arrest, court, proceeding, 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, accidental/unexplained death, escapes.	End of Calendar Year	1 year then destroy
PD 165	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.	Property Disposed Date	3 years then Destroy
PD 170	Radar Reports	Records may include certification of calibration, routine radar check reports, and certification of accuracy for tuning forks.	Equipment no longer in use	2 years then Destroy
PD 175	Sex Offenders	Records relative to sex offenders that may include name, address, photograph, place of employment, date of birth, crime for which convicted, date of conviction, and court of conviction.	Remain Open until obsolete, superseded or administrative need is met.	7 years then destroy
PD 180	Traffic (Citations) Records	Records include summons books (regarding operation, control or maintenance of motor vehicle violations), citations and tickets (also parking), notices for court appearances, etc.	End of Calendar Year	1 year then destroy
PD 185	Use of Force Investigations	Investigations on the application of physical or deadly force. Records may include copies from complaint report file, inquiry and findings.	Matter Resolved	7 years then destroy



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
PLN 100	Addressing Files	Records include information regarding road names, road name changes, addressing files.	End of Calendar Year	Permanent
PLN 105	Case Files (Withdrawn/abandoned Proposals)	Abandoned or Withdrawn Case files that were never reviewed by the Planning Commission.	Date Withdrawn	3 years and then Destroy
PLN 110	Case Files (Approved, Waivered, Denied Proposals)	Full files regarding cases related to the CBS planning department. Records may consist of applications, permits, site plans, plot plans, platting actions, legal communications, appeals files, commission actions, zoning amendment requests, public notices, right-of-way permits, acknowledgment of conditions, staff reports and records of surrounding properties.	Date Project/Permit Concludes	Permanent
PLN 115	Citywide Plans	Official plans produced by the Planning Department that are adopted/approved by the assembly. Some plans include: Costal Management Plan, Comprehensive Plan, Sustainability Plan, Master Plans, Transportation Plans, Tourism Plan, etc.	End of Calendar Year	Permanent
PLN 120	Land Management	Records related to the management of municipally owned land, including patents/Deeds, surveys, easements, etc.	End of Calendar Year	Permanent
PLN 125	Planning & Zoning Enforcement (Code Enforcement)	Records relating to complaints and action taken regarding the enforcement of planning and zoning regulations.	Date Case Closed	Permanent
PLN 130	Sustainability Files	Final Reports/grants/final plans related to sustainability projects.	End of Calendar Year	Permanent
PLN 135	Zoning Maps	Full zoning map for CBS.	End of Calendar Year	Permanent



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
PROC 100	Procurement Files	Records include documents related to purchase 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, etc.	Contract End Date	6 years then Destroy
PROC 110	Lease Agreements – CBS is Lessor	CBS is the renting land or property from an outside entity.	Lease Expire Date	50 years then Destroy
PROC 115	Land Lease Agreements – CBS is Lessee of Land	CBS is leasing land to an outside entity.	Lease Expire Date	50 years then Destroy
PROC 120	Lease Agreements – CBS is Lessee	CBS is leasing property to an outside entity.	Lease Expire Date	6 years then Destroy



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
PWD 100	Bridge Files	Cumulative history file for bridges, memoranda, correspondence, newspaper clippings, reports, plans/specifications, materials lists, excavation permits, bridge deficiency/inspection reports and work orders.	Until obsolete or Superseded	Permanent
PWD 105	Construction Project Files	Specifications, contracts, plans, bids, evaluations, performance bonds and correspondence documenting solicitation, selection, award/administration of contracts and professional service agreements. May include project charters, project schedules, as-built drawings, inspection files, project related permits, photo catalogs, project submittals, field reports, job accounting information, contract modifications, data relative to utilities and project close-out information.	Project or Grant Closed out Date	Permanent
PWD 110	Easement and Vacation Files	Records consist of grant of easements for legal permission to conduct work on private property, including, but not limited to, laying, constructing, maintaining, operating, repairing and servicing electrical utilities. Also vacations (including section line and deeds of vacation), descriptions of easement areas, diagrams, plans, agreements, memoranda, correspondence and property disposition.	Issue Date	Permanent
PWD 115	Facility Maintenance	Records include all documents and files relating to operation of facility, including permits, utilities correspondence, bids, reports, proposals, accounting, problems and enabling legislation.	End of Calendar Year	Permanent
PWD 120	Fuel Summaries & Receipts	Records consist of daily, weekly or monthly fuel dispensed.	End of Calendar Year	3 years then Destroy
PWD 125	Geologic and Geotechnical Data	Documents relating to slides, avalanches, borings/drainage, and other subsurface conditions including piling records.	End of Calendar Year	Permanent
PWD 130	Landfills	Records may include certificates of insurance, ground water samples/analysis, EPA screening site inspection, preliminary assessments, field test reports, methane gas analyses/results, engineering, operating, contingency, sedimentation and erosion control plans, hydrogeological reports, monitoring logs, CERCLIS documentation, site access agreements, and closure/post closure records.	End of Calendar Year	Permanent
PWD 135	Maintenance Work Orders	Records consist of 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.	End of Calendar Year	Permanent
PWD 140	Non-Project Public Works Permit Files	Files may consist of utility connection permits, driveway permits, encroachment permits, inspection records, specifications, drawings, and other non-project building permits.	Permit Expire or Finaled Date	Permanent



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
PWD 145	Project cost estimate library	Catalog of contractor cost estimates for Public Works-related work; Includes all design cost estimates or quotes for Public Works projects.	Remain Open until obsolete, superseded or administrative need is met	Destroy Immediately
PWD 150	Public Works Survey Data	Survey data and files.	End of Calendar Year	Permanent
PWD 155	Regulatory Compliance Files	Records documenting compliance with state/federal requirements such as coastal resources management and freshwater wetlands.	End of Calendar Year	Permanent
PWD 160	Right-of-Way Permits (DOT and CBS)	DOT and CBS ROW permits, applications, and correspondence.	Permit Expire or Finaled Date	Permanent
PWD 165	Solid Waste Quantities	Annual Report from Republic including waste process quantities.	End of Calendar Year	Permanent
PWD 170	Spill Containment Files	Files documenting hazardous materials/spill containment incidents.	End of Calendar Year	Permanent
PWD 175	SWPPP Plans	Granite Creek and Scrap Yard SWPPP.	End of Calendar Year	Permanent
PWD 180	Water System Monitoring	Documentation regarding monitoring water distribution system including flow rates, pressure and elevation.	End of Calendar Year	Permanent
PWD 185	Water System Repairs	Records of work performed and completed on connections and mains.	End of Calendar Year	Permanent
PWD 190	Water Testing	Records pertaining to Water and Wastewater testing, Chain of Custody, Fecal coliform, Hydrolab calibration, Lab bench sheets, and toxicity reports.	End of Calendar Year	Permanent
PWD 195	Work and Repairs	Records consist of complaints, work or repairs initiated by citizens or CBS staff. May include information regarding name and number of requestor, location and type of work to be performed, dates and time of receipt/response.	End of Calendar Year	Permanent



CITY AND BOROUGH OF SITKA

Records Retention Schedule

RECORD SERIES	TITLE	DESCRIPTION (docs that fall in this Category)	CUTOFF (when the record closes)	RETENTION (How long the record is kept for)
RSK 100	Insurance Policy and Endorsements	This series includes insurance policies and endorsements; explanation of coverage.	Policy End Date	50 years then Destroy
RSK 105	Risk Management Claim Files / Insurance Claims	Records may include correspondence to/from claims adjusters, private attorneys; accident or incident reports (property damage and personal injury) summary reports, payment orders/verification, pleadings/depositions and individual claim records.	Date claim settled and all legal aspects are resolved.	7 years then Destroy