

General Records Retention and Disposal Schedule  
Function: Administration

SERIESNO	SERIES	DESCRIPTION	RETENTION
ADM-01	Minutes of City Council, standing committees, boards, commissions, etc.	Documents proceedings and decisions of City policy-making bodies. Includes dockets, agendas, minutes and agenda submission, and support material. The permanent version of minutes must be retained in paper hard-copy. However, records may also include recordings of electronically held meetings.	PERM: Transfer to City Archives when non-current.
ADM-02	Policies, Procedures, Bylaws and Directives	These records document City policies, codes, procedures, etc.	PERM: Transfer to City Archives when non-current.
ADM-03	Annual Reports, Department – Original Copy	Documents reports prepared by or for the City addressing the “state” of the department, including goals, targets, objectives and finances.	PERM: Transfer to City Archives when non-current.
ADM-04	Publications – Department Produced or Sponsored	Documents the official release of department publications meant for public distribution or general internal distribution. These records may include reports, press releases, brochures, newsletters and other items that are published by the City to distribute information about the City, upcoming events, accomplishments, services offered, etc.	PERM: Transfer to City Archives when non-current.
ADM-05	Public Relations Files - Historically Significant	Documents information provided to the public and business or government communities. Includes statements, visual aids, news releases and news clippings regarding historically significant events. Also, one official copy of any historically significant publications.	PERM: Transfer to City Archives when non-current.
ADM-06	Project Documentation Files - Historically Significant	Documents design, development, control or monitoring of a specific project or group of projects, which are historically significant. May include Reports, Studies, Surveys, Models, and Analyses.	PERM: Retain while of reference value, then transfer to City Archives.
ADM-07	Recordings, Audio and Visual Historically Significant	Documents the collection of the audio or visual recordings, created by or for a department, that are of an enduring historically significant nature or that describe the current function or organization of the department’s major administrative units. Commercially available material may be included, if appropriate. Does not include recordings used in lieu of minutes or as temporary transcripts of minutes.	PERM: Transfer to City Archives when non-current.
ADM-08	Directives - Originator’s Record Copy	Directives by department head(s) outlining policy to lower levels of authority. Transfer to City Archives when non-current. (Destroy recipient copies when no longer administratively useful.)	PERM: Transfer to City Archives when non-current. (Destroy recipient copies when no longer administratively useful.)

SERIESNO	SERIES	DESCRIPTION	RETENTION
ADM-09	Correspondence/Subject Files - Historically Significant	Incoming and outgoing letters, memoranda, faxes, notes and their attachments containing administrative, fiscal, legal, intrinsic, evidential and/or informational value justifying permanent preservation. These records may exist in any physical format including, but not limited to, paper and e-mail.	PERM: Transfer to City Archives when non-current.
ADM-10	Correspondence/Subject Files – Program Administration	Incoming and outgoing letters, memoranda, faxes, notes and their attachments, in any physical format including, but not limited to paper and e-mail. Includes letters, memos, inquiries and explanations, work product, and related correspondence. Documents the routine administration of agency programs and services. NOTE: General correspondence does not pertain to a specific issue, and it is often organized chronologically or by correspondent's name. General correspondence may include referral correspondence. If the correspondence does pertain to a specific issue, it should be filed with other relevant records. General correspondence may exist in a variety of formats, including memos, letters, notes and electronic mail messages. This series also includes automated or manual tools that index and/or track when correspondence was received, the topic of the correspondence, who is responsible for responding to the correspondence, and when the correspondence is considered closed for further action. These records are used to support administrative analysis, program and project planning, procedure development, and programmatic activities. Subject files are generally organized alphabetically by topic. Document types may include periodic activity reports (narrative and statistical), special reports, topical correspondence (including electronic mail), research materials, project planning notes, organizational charts, department descriptions, etc. Subject files do NOT include files related to individual program activities, human resources files, and accounting records. For topics of continuing interest, files may be segmented into annual files. Retain while topical file is of interest for ongoing administrative needs + three years.	03: Retain current fiscal year plus three years then destroy.  For topics of continuing interest, files may be segmented into annual files. Retain while topical file is of interest for ongoing administrative needs + three years.
ADM-11	Transitory Correspondence	Transitory correspondence is any form of written communication with a short-term interest requiring retention of less than ninety days. This type of correspondence has limited administrative and evidential value that is lost soon after the communication is received. Transitory messages do not set policy, establish guidelines or procedures, certify a transaction or become a receipt. Examples of transitory correspondence include letters of transmittal that do not add information to the transmitted materials, routine requests for information that require no administrative action, policy decision, special compilation or research. This type of record also includes invitations to work-related events, notifications of an upcoming meeting, and similar records.	SUP/OBS: Destroy when obsolete.

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ADM-12	Chronological Reference File	This file is also known as reading or day file. It is used as a chronological reference source supplemental to correspondence and subject reference files.	SUP/OBS: Destroy when obsolete or superseded.
ADM-13	Administrative Working Files	Subject files containing informational copies of various records organized by issue, person, subject, or other areas of interest. These are convenience files, typically kept by individual officials, and duplicative or redundant vis-à-vis Program Administration files (ADM-10).	SUP/OBS: Destroy when obsolete or superseded.
ADM-14	Office Procedures and Instructions	Written procedures and instructions issued by departmental administration. Destroy when superseded	SUP/OBS: Destroy when superseded
ADM-15	Staff / Routine Administrative Meeting Records	These records may include meeting minutes, agendas, and distribution materials related to staff meetings, routine business operations, etc. Includes recordings of electronically held meetings of bodies without regulatory or decision-making powers.	03: Retain three years from date of creation, then destroy.
ADM-16	Work Orders - Administrative Copies	Documents the submission of work orders or production orders by the requestor.	03: Retain three years from date of work order, then destroy.
ADM-17	Work or Production Control Records	Documents the creation of records created to project, monitor, control, tabulate or report the daily work activities of an individual or group other than payroll records.	SUP/OBS: Retain as long as administratively necessary, then destroy.
ADM-18	Records Management Files - Approved Retention and Disposition Schedules	Documents the approval of retention and disposition schedules and certificates of records disposal.	03: Retain until superseded, obsolete or rescinded + three years, then destroy.
ADM-19	Security Backup Files / Vital Records Backup Copies	Documents the creation of duplicate copies of records, usually electronic records, created for information security purposes.	SUP/OBS: Retain as long as administratively necessary, then destroy.
ADM-20	Recordings, Audio and Visual - Security Recordings	Documents the production of audio or visual recordings related to the monitoring or security of facilities.	SUP/OBS: Retain as long as administratively or legally necessary, then destroy.
ADM-21	Project Files	Records may contain various working documents pertaining to project(s), also finalized project documents such as final report, publication, etc.	07: Retain seven years from end of project, then destroy.
ADM-22	Project Documentation Files -	Documents design, development, control or monitoring of a specific project or	SUP/OBS: Retain until

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	Other Files	group of projects.	superseded, obsolete or rescinded, then destroy.
ADM-23	Budget Planning	These records are developed and maintained by each department to forecast the need for new facilities, equipment, supplies, staff, programs, etc. They may include budget requests, statistics, etc.	SUP/OBS: Retain while needed to administer the budget for the current fiscal year, and/or to prepare future budget requests, then destroy.
ADM-24	Grants	These files are used to administer grants that are applied for from state, federal and private agencies. These files may contain applications, budgets, worksheets, adjustments, plans, rules and regulations, award letters, committee records, staffing sheets with account numbers, grant evaluation/monitoring reports, audits, periodic progress reports, etc.	SUP/OBS: Retain until the grant is closed out, plus any additional time that is required by the granting agency for auditing purposes. Final reports and products of the grant may be kept longer for use and reference purpose. Destroy when obsolete.
ADM-25	Presentation Materials	Documents materials created for use in speeches, briefings, demonstrations, classes or seminars (e.g., slides overheads, flip charts, and handouts). Does not include commercially available materials.	SUP/OBS: Retain as long as administratively necessary, then destroy.
ADM-26	Directory Listings and Files	Lists the current or former employees and/or phone listings, office listings or lists of contacts or service providers. Also, mailing lists.	SUP/OBS: Retain until superseded, obsolete or rescinded, then destroy.
ADM-27	Planners/Calendars	The Planners/Calendars may be electronic or manual (paper), that are used to track an individual staff member's work-related meetings, assignments, and tasks. Individual employees are responsible for retaining their planners/calendars for the duration of this retention period.	03: Retain three years from planner/calendar year date(s), then destroy.
ADM-28	Recordings, Audio and Visual - Other Recordings	Documents the production of audio or visual recordings, not used for security of items or considered historically significant. Does not include commercially available material or recordings used in lieu of minutes or as temporary transcripts of minutes.	SUP/OBS: Retain as long as administratively necessary, then destroy.