

TOWN OF NEW GLARUS

RECORDS RETENTION SCHEDULE

GENERAL PROVISION. Under §19.21(4)(a), municipalities shall notify the State Historical Society of Wisconsin (SHSW) prior to destroying records.

Retention Period. Refers to the time that the identified records must be kept until destruction.

Authority. Source which specifies the period of time for retaining records.

| | |
|------|------------------------------------|
| WMRM | Wisconsin Municipal Records Manual |
| § | State Statutes |
| SCR | Supreme Court Rule |
| PSC | Public Service Commission |
| NR | Natural Resources |

SHSW Notice refers to whether or not the State Historical Society of Wisconsin has waived the required statutory notification prior to destruction of records.

- W (waived) means records are not historical and the required 60 day notification is waived.
- N (nonwaived) means the records may have secondary historical value and therefore SHSW notification is required on a case-by-case basis prior to destruction.
- N/A means not applicable and refers to those circumstances where a local unit of government is retaining a record permanently.

(A) ELECTED OFFICIALS. The following public records may be destroyed after the expiration of the designated retention period.

| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
|---|--------------------------------------|------------------|--------------------|
| All records in their possession unless delegated in writing to the Town Clerk or his/her designee | 1 year following termination of term | §19.33(1) | N |

(C) CLERK'S OFFICE RECORDS. The following public records may be destroyed after the expiration of the designated retention period:

| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
|--|--|--------------------|--------------------|
| Meeting agendas | 7 years | WMRM | W |
| Minutes books | Permanent | WMRM | N/A |
| Audio tapes | 90 days if made solely for the purpose of drafting the minutes | WMRM and §19.21(7) | W |
| Ordinances | Permanent | WMRM | N/A |
| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
| Resolutions | Permanent | WMRM | N/A |
| Municipal Code | Permanent | WMRM | N/A |
| Affidavits of Publication | 3 years | WMRM | W |
| Affidavits of Publication for ordinances and Resolutions for budget amendments | Permanent | WMRM | N/A |
| Claims | 7 years | | W |
| Lawsuits | Permanent | | N/A |
| Insurance Policies and Certificates of Insurance | Permanent | | N/A |
| Oaths of Office | 7 years after term of oath ends | WMRM | W |
| Title insurance policies | Permanent | WMRM | N/A |
| Easements | Permanent | WMRM | N/A |
| Leases | 7 years following | WMRM | W |

| | | | |
|--|---|---------------|-----|
| | termination of lease | | |
| Liquor and beer applications and licenses | 4 years | §125.04(3)(i) | W |
| Other applications and licenses/permits issued by Town Clerk | 4 years | WMRM | W |
| Dog licenses reports to County Clerk | 7 years | WMRM | W |
| Proceedings of Board of Review on audio tapes or as stenographic notes, including transcriptions | 7 years (after final action by board of review or completion of appeal) | §70.47(8)(f) | W |
| Notice of determinations of the Board of Review | 7 years (after final action by the board of review or completion of appeal) | §70.47(8)(f) | W |
| Legal Opinions | Permanent | WMRM | N/A |
| Contracts | 7 years | WMRM | W |

(D). ELECTION RECORDS. All materials and supplies associated with an election may be destroyed according to the following schedule, unless there is a recount or litigation pending with respect to the election:

| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
|---|---|----------------------|--------------------|
| Unused ballots and materials | 3 business days after the canvass is completed | §7.23(a) | W |
| Voter serial number slips | 3 business days after the canvass is completed | §7.23(a) | W |
| Ballots (state, county, local) | 30 days after the election | §7.23(h) | W |
| Ballots (federal offices)**** | EVT (22 months after election) | §7.23(f) | W |
| Application for absentee ballots | 90 days after the election (22 months after the election for federal offices) | §7.23(k) §7.23(f) | W |
| Forms associated with election such as tally sheets, inspector's statements and nomination papers | 90 days after the election (22 months after the election for federal offices) | §7.23(k) §7.23(f) | W |
| Official canvass statements | 10 years after the election | §7.23(i) | W |
| Registration and poll lists - Nonpartisan primaries and election | 2 years after the election for which they were created | §7.23(e) | W |
| Registration and poll lists - Partisan primaries and general elections | 4 years after the election | §7.23(e) | W |
| Canceled registration cards | 4 years after cancellation | §7.23(c) | W |
| Election notices | 1 year after the election (22 months for federal election) | §7.23(j) §7.23(f) | W |
| Proofs of publication and correspondence relative to publications | 1 year after the election (22 months for federal election) | §7.23(j) §7.23(f) | W |
| Campaign registration statement | 6 years after termination by the registrant | §7.23(d) | W |
| Campaign finance reports | 6 years after date of receipt | §7.23(d) | W |

**** Federal offices are President of the United States, U.S. Senator and Congress.

(E). FINANCE DEPARTMENT RECORDS: The following public records may be destroyed after the expiration of the designated retention period

| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
|--|----------------------------------|------------------|--------------------|
| Bank statements, deposit books, slips and stubs | 7 years | WMRM. | W |
| Bonds and/or coupons | 7 year after maturity | WMRM | W |
| Canceled checks, check stubs | 7 years | WMRM | W |
| Payroll records and reports, and employee time cards | 7 Years | WMRM | W |
| Employment Records | 7 years following termination | WMRW | W |
| Applications for Employment and Resumes of persons not hired | 1 year after filling of position | | W |
| Receipt forms | 7 years | WMRM | W |
| Special Assessment Records | 7 years | WMRM | W |
| Tax levy certification of the school district clerk | 3 years (after audited) | WMRM | W |
| Certificates of apportionment | 3 years (after audited) | WMRM | W |
| State shared aid payment notices | 6 years (after audited) | WMRM | W |
| Final worksheet for determining allowable levy | 5 years (after audited) | WMRM | W |
| Statement of taxes | Permanently | WMRM | N/A |
| Statement of new special assessments | 5 years (after audited) | WMRM | W |
| Statement of new sewer service charges | 5 years (after audited) | WMRM | W |
| General property tax credit certification | 5 years (after audited) | WMRM | W |
| Explanation of property tax credit certification | 5 years (after audited) | WMRM | W |
| Real property tax roll | 15 year | WMRM | N |
| Personal property tax roll | 15 years | WMRM | N |
| Financial Reports (other than annual reports) | 7 years | WMRM | W |

(F). PUBLIC WORKS DEPARTMENT RECORDS: The following public records may be destroyed after the expiration of the designated retention period:

| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
|---|---|------------------|--------------------|
| Notice to contractors | 7 years (after completion of project) 2 years (unsuccessful bidders) | WMRM | W |
| Bid bond | 7 years (after completion of project) 2 years (unsuccessful bidders) | WMRM | W |
| Bidders proof of responsibility | 7 years (after completion of project) 2 years (unsuccessful bidders) | WMRM | W |
| Bids | 7 years (after completion of project) 2 years (unsuccessful bidders) | WMRM | W |
| Bid tabulations | 2 years | WMRM | W |
| Performance bond | 7 years (after completion of project) | WMRM | W |
| Contract | 7 years (after completion of project) | WMRM | W |
| Street vacation and dedications | Permanent | WMRM | N/A |
| Benchmark Books | Permanent | WMRM | N/A |
| Section corner monument logs | Permanent | WMRM | N/A |
| Water, Storm and Sanitary Sewer Main maps | Permanent | WMRM | N/A |

(G) ASSESSING DIVISION RECORDS. The following public records may be destroyed after the expiration of the designated retention period.

| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
|---|--|------------------|--------------------|
| Master property record folders | 5 years. after life of structure | WMRM | W |
| Index to owners | Until superseded | WMRM | W |
| Wisconsin Real Estate Transfer returns | 5 years. after info transferred to Master Property Record folders | WMRM | W |
| Tax Exemption Reports | 10 years | WMRM | W |
| Notice of Increased Assessment | 5 years unless assessment appealed, retain 7 years after final BOR action or appeal completion | WMRM | W |
| Assessor's Final Report Supplement – Real and Personal Property | 5 years | WMRM | W |
| Assessor's Final Report Real and Personal Property | 5 years | WMRM | W |
| Certified Survey Maps | Permanent | WMRM | W |
| Final subdivision plats | Permanent | WMRM | W |
| Annexation plats | Permanent | WMRM | W |
| Assessor's plats | Permanent | WMRM | W |
| Conditional use grants | Permanent | WMRM | W |

(I). ENGINEERING DIVISION RECORDS. The following public records may be destroyed after the expiration of the designated retention period.

| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
|---|----------------------------|------------------|--------------------|
| Annual reports | Permanent | WMRM | N/A |
| Field notes | Permanent | WMRM | N/A |
| Benchmark Books (Horizontal and Vertical Survey Control in SE Wis.) | Permanent | WMRM | N/A |
| Section corner monument logs | Permanent | WMRM | N/A |
| Town Official Maps | Permanent | WMRM | N/A |
| Water, storm, and sanitary sewer main | Permanent | WMRM | N/A |

| | | | |
|---|------------------------------|------------------|--------------------|
| maps | | | |
| Profile and grade books | Permanent | WMRM | N/A |
| Excavation plans of private utilities | Permanent | WMRM | N/A |
| Index to maps | Permanent | WMRM | N/A |
| Applications and permits | Permanently | WMRM | N/A |
| Asbuilts (Sewer and Water) | Permanent | WMRM | N/A |
| Structure plans for municipal buildings and Bridges | Life of Structure | WMRM | W |
| Permits for excavation of streets including private utility companies | 3 years | WMRM | W |
| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
| Fuel usage reports | 2 years | WMRM | W |
| Heavy equipment and vehicle (Maintenance Records) | Life of equipment | WMRM | W |
| Vehicle maintenance histories | Life of vehicle | WMRM | W |
| Storm Sewer Maps | Until superseded by asbuilts | WMRM | W |
| Quarter Section Maps | Until superseded | WMRM | W |

(J) BUILDING INSPECTION DEPARTMENT RECORDS. The following public records may be destroyed after the expiration of the designated retention period.

| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
|--|----------------------------|-----------------------|--------------------|
| Address file | Permanently | WMRM | N/A |
| Certificates of occupancy | Until superseded | WMRM | W |
| Energy calculation worksheets | 3 years | WMRM | W |
| State approved commercial building plans | 4 years | WMRM | W |
| Permit fee receipts | 7 years | WMRM | W |
| Permit ledger | 7 years | WMRM | W |
| Quarter section maps, copies | Until superseded | WMRM | W |
| Building Plans | 1 Year after built | Uniform Dwelling Code | W |
| Applications and permits | Permanently | WMRM | N/A |
| Code compliance inspection reports | Permanently | WMRM | N/A |

| | | | |
|------------------------------------|---------|------|---|
| Weights and Measures Field Reports | 3 years | WMRM | W |
| | | | |

(K) PARK RECORDS. The following public records may be destroyed after the expiration of the designated retention period:

| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
|-------------------------|---|------------------|--------------------|
| Master park plan | Permanently | WMRM | N/A |
| Plats | Permanently | WMRM | N/A |
| Aerial photographs | Permanently | WMRM | N/A |
| Reservation requests | 30 days. If payment receipts are attached 7 years | WMRM | W |
| Master reservation book | 2 years | WMRM | W |

(L) PLANNING AND DEVELOPMENT DEPARTMENT RECORDS. The following public records may be destroyed after the expiration of the designated retention period.

| RECORDS | PERIOD OF RETENTION | AUTHORITY | SHSW NOTICE |
|---------------------------|----------------------------|------------------|--------------------|
| Comprehensive Master Plan | Permanent | WMRM | N/A |
| Neighborhood Plans | 7 years | WMRM | W |
| Stormwater Plans | 7 years | WMRM | W |
| Design manual and guides | 7 years | WMRM | W |

(M) Public Records not identified in this Records Retention Schedule shall be retained seven (7) years in accordance with §19.21(5)(c), Wisconsin Statutes, and Section (Insert code number here) of the New Glarus Municipal Code of the Town of New Glarus and may then be destroyed subject to SHSW authorization.