

## RECORDS INVENTORY AND RETENTION SCHEDULE COVER SHEET

<b>Schedule Number</b> <small>(To be completed by DGS/Records Management Division)</small>	M409
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**Agency Information**

Department / Agency	Town of Garrett Park
Division / Unit	
Mission Statement/Link to division/unit website	www.garrettparkmd.gov

**Schedule Information**

Supersedes Schedule(s)	
Amends Schedule(s)	

**Preparer Information**

Name of Preparer	Claire McDonald
Title of Preparer	Town Archivist (Contractor)
Preparer Email Address	archives@garrettparkmd.gov
Preparer Telephone Number	301-942-3050
Date	

**Agency Approval**

Name of Agency Director	Andrea Fox, Town Manager
Agency Director Signature	<i>Andrea Fox</i>
Date	10/24/19

**State Archivist Approval**

State Archivist Signature	<i>Timothy D. Bell</i>
Date	12-5-19

**DEPARTMENT OF GENERAL SERVICES  
RECORDS MANAGEMENT DIVISION  
RECORDS INVENTORY AND RETENTION SCHEDULE**

**Schedule No.** *m409*  
(To be completed by DGS/Records Management Division)

**Records Series Title:**

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**Town Council Meeting Minutes, Current**

<b>Record Series Content</b>	Paper and electronic versions of minutes from Town Council meetings 1980 to present
<b>Record Series Function</b>	Provide a summary record of Town Council deliberations and decisions on various issues such as land use approvals, public spaces, taxes, and local ordinances
<b>Organization/ Arrangement</b>	Chronological by date
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper and electronic
<b>Volume (file drawers, gigabytes, etc.)</b>	3.5 cubic feet of paper and approximately 72 megabytes of electronic copies (Town Office) 5 cubic feet of paper and approximately 50 megabytes of electronic copies (Town Archive Room)
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	0.5 cubic feet paper; 10 megabytes
<b>Current Location</b>	Town office and server; town archive room and archive back-up drive
<b>Audit Requirements</b>	Annually
<b>Date Span</b>	1980 to present
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	1
<b>Retention</b>	Permanent. Retain 50 years, then transfer to MSA.
<b>Justification for Permanent Retention</b>	These records document significant decisions made in the town and therefore have historic importance and value to town officials, residents, and researchers.

**DEPARTMENT OF GENERAL SERVICES  
RECORDS MANAGEMENT DIVISION  
RECORDS INVENTORY AND RETENTION SCHEDULE**

**Schedule No.** *M 409*  
(To be completed by DGS/Records Management Division)

<b>Records Series Title:</b>  Town Council Meeting Minutes, Historical	<b>Page 2 of 25</b>
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<b>Record Series Content</b>	Handwritten and transcribed paper originals plus electronic copies and scans of minutes from Town Council meetings from 1898, when the town was chartered, through 1979
<b>Record Series Function</b>	Provide a historical summary record of Town Council deliberations and decisions on various issues such as land use approvals, public spaces, taxes, and local ordinances
<b>Organization/Arrangement</b>	Chronological by date
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper, microform, electronic (scans of 1940s/1950s only)
<b>Volume (file drawers, gigabytes, etc.)</b>	4.5 cubic feet of paper; 2 microfilm reels; approximately 62 megabytes
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	N/A
<b>Current Location</b>	Town office; town archive room and archive back-up drive
<b>Audit Requirements</b>	N/A
<b>Date Span</b>	1898–1979
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	2
<b>Retention</b>	Permanent. Retain 50 years from approval of retention schedule, then transfer to MSA.
<b>Justification for Permanent Retention</b>	These records document significant decisions made regarding the management and growth of the town and therefore have historic importance and value to town officials, residents, and researchers.

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**Schedule No.** *m 409*  
(To be completed by DGS/Records Management Division)

<b>Records Series Title:</b>  <b>Audio-Visual Records of Town Council Meetings</b>	<b>Page 3 of 25</b>
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<b>Record Series Content</b>	Magnetic cassette recordings, digital audio files, and digital audiovisual file of full Town Council meetings
<b>Record Series Function</b>	Provide complete audio record of Town Council deliberations and decisions on various issues such as land use approvals, public spaces, taxes, and local ordinances
<b>Organization/Arrangement</b>	Chronological by date
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Magnetic cassettes; digital audio/video files
<b>Volume (file drawers, gigabytes, etc.)</b>	2 cubic feet of cassette tapes 8.4 gigabytes
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	1.2 gigabytes
<b>Current Location</b>	Town Office server and flashdrives (and uploaded to YouTube channel); town archive room
<b>Audit Requirements</b>	None
<b>Date Span</b>	1981 and 1998-2005 (cassettes); 2012 to 2018 (digital audio); 2018 to present (digital audio-visual)
<b>Completeness /Gaps</b>	No tapes for 1982 through 1997

<b>Schedule Item Number</b>	3
<b>Retention</b>	Retain 7 years, then destroy.
<b>Justification for Permanent Retention</b>	N/A

**DEPARTMENT OF GENERAL SERVICES  
RECORDS MANAGEMENT DIVISION  
RECORDS INVENTORY AND RETENTION SCHEDULE**

Schedule No. **m409**  
(To be completed by DGS/Records Management Division)

<b>Records Series Title:</b>  <b>Ordinances, Resolutions, and Proclamations</b>	<b>Page 4 of 25</b>
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<b>Record Series Content</b>	Paper and electronic originals and copies of Town Council proceedings in the form of ordinances (or local laws), resolutions, and proclamations
<b>Record Series Function</b>	Provide a record of rules, decisions, opinions, and announcements passed by the Town Council since the establishment of the town
<b>Organization/Arrangement</b>	Chronological by date
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper and electronic
<b>Volume (file drawers, gigabytes, etc.)</b>	2.25 cubic feet Approximately 5 megabytes digital
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	< 0.2 cubic feet Approximately 1 megabyte
<b>Current Location</b>	Town office and server; town archive room
<b>Audit Requirements</b>	Annual
<b>Date Span</b>	1898 to present
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	4
<b>Retention</b>	Permanent. Retain 50 years from approval of Records Retention Schedule, then transfer to MSA.
<b>Justification for Permanent Retention</b>	These records document significant decisions made, intent and opinions, and actions taken by the Town Council in regards to town rules and procedures and therefore have historic importance and value to town officials, residents, and researchers.

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RECORDS MANAGEMENT DIVISION  
RECORDS INVENTORY AND RETENTION SCHEDULE**

Schedule No. **M409**  
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**Records Series Title:**

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**Charter and Amendments**

<b>Record Series Content</b>	Paper and electronic versions of the Town Charter and amendments made to the charter by the Town Council
<b>Record Series Function</b>	Provide a record of changes made by the Town Council to the Town's Charter, which describes how the town will be operated and managed
<b>Organization/Arrangement</b>	Chronological by date
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper and electronic
<b>Volume (file drawers, gigabytes, etc.)</b>	1.1 cubic feet Approximately 200 kilobytes
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	< 0.2 cubic feet Approximately 24 kilobytes
<b>Current Location</b>	Town office and server; town archive room
<b>Audit Requirements</b>	None
<b>Date Span</b>	1961 to present
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	5
<b>Retention</b>	Permanent. Retain 50 years from approval of Records Retention Schedule, then transfer to MSA.
<b>Justification for Permanent Retention</b>	These records document significant decisions and actions regarding the operation and management of the town and therefore have historic importance and value to town officials, residents, and researchers.

<b>DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION RECORDS INVENTORY AND RETENTION SCHEDULE</b>	<b>Schedule No.</b> M409 (To be completed by DGS/Records Management Division)
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<b>Records Series Title:</b>  General Correspondence, Current	<b>Page 6 of 25</b>
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<b>Record Series Content</b>	Paper and electronic originals of incoming and copies of outgoing correspondence related to managing town business during the period 1980 to present
<b>Record Series Function</b>	Provide a record of communication between town officials, including the Mayor, Town Council Members, and Town Manager, and other state and local government officials, vendors, residents, and others
<b>Organization/Arrangement</b>	By year, subject, and correspondent
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper and electronic
<b>Volume (file drawers, gigabytes, etc.)</b>	Approximately 2 cubic feet and 20 gigabytes (Town Office) Approximately 2 cubic feet (Town Archive Room)
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	0.25 cubic feet 1 gigabyte
<b>Current Location</b>	Town office and server; town archive room
<b>Audit Requirements</b>	None
<b>Date Span</b>	1980–Present
<b>Completeness /Gaps</b>	None

<b>Schedule Item Number</b>	6
<b>Retention</b>	Retain for 3 years, then screen annually; destroy material no longer needed for current business, with the following exception: transfer records with historical value to MSA every 3 years.
<b>Justification for Permanent Retention</b>	Some correspondence may document significant decisions and actions regarding the operation and management of the town and therefore have historic importance and value to town officials, residents, and researchers.

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<b>Records Series Title:</b>  General Correspondence, Historical	<b>Page 7 of 25</b>
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<b>Record Series Content</b>	Paper originals of incoming and copies of outgoing correspondence related to managing town business during the period 1898 through 1979
<b>Record Series Function</b>	Provide a record of communication between town officials, including the Mayor, Town Council Members, and Clerk/Treasurer, and other state and local government officials, vendors, residents, and others
<b>Organization/Arrangement</b>	Subject, year, correspondent
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper
<b>Volume (file drawers, gigabytes, etc.)</b>	Approximately 2 cubic feet
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	N/A
<b>Current Location</b>	Town archive room
<b>Audit Requirements</b>	NA
<b>Date Span</b>	1898–1979
<b>Completeness /Gaps</b>	NA

<b>Schedule Item Number</b>	7
<b>Retention</b>	Permanent. Retain 50 years from approval of Records Retention Schedule, then transfer to MSA.
<b>Justification for Permanent Retention</b>	These records document significant decisions and actions regarding the operation and management of the town and therefore have historic importance and value to town officials, residents, and researchers.



<b>DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION RECORDS INVENTORY AND RETENTION SCHEDULE</b>	<b>Schedule No.</b> <i>m 409</i> (To be completed by DGS/Records Management Division)
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<b>Records Series Title:</b>  <b>Land Use Records</b>	<b>Page 8 of 25</b>
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<b>Record Series Content</b>	Paper originals and copies of land deeds, agreements, plats, surveys, and zoning
<b>Record Series Function</b>	Provide a record of land acquisitions and decisions about use in the town.
<b>Organization/Arrangement</b>	Street and/or street address, lot, and/or block
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper
<b>Volume (file drawers, gigabytes, etc.)</b>	2 cubic feet
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	n/a
<b>Current Location</b>	Town archive room
<b>Audit Requirements</b>	None
<b>Date Span</b>	1898–2010
<b>Completeness /Gaps</b>	Intermittent

<b>Schedule Item Number</b>	8
<b>Retention</b>	Permanent. Retain 50 years from approval of Records Retention Schedule, then transfer to MSA.
<b>Justification for Permanent Retention</b>	These records reflect significant decisions and actions regarding the acquisition and use of town land and therefore have historic, and potentially legal, importance and value to town officials, residents, and researchers.

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**Schedule No.** M409  
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<b>Records Series Title:</b>  Vendor Records	<b>Page 9 of 25</b>
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<b>Record Series Content</b>	Paper originals and copies of procurement related documents such as contracts, proposals and quotes, and vendor information
<b>Record Series Function</b>	Provide a record of town purchasing and procurement actions and decisions
<b>Organization/Arrangement</b>	Year, vendor name (for current records back to 2015); type of service, vendor, year for older records
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper
<b>Volume (file drawers, gigabytes, etc.)</b>	2.5 cubic feet
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	0.5 cubic feet
<b>Current Location</b>	Town office and archive room
<b>Audit Requirements</b>	Annual end of fiscal year audit
<b>Date Span</b>	1973 to present
<b>Completeness /Gaps</b>	Intermittent depending on type of service/length of service period

<b>Schedule Item Number</b>	9
<b>Retention</b>	Retain 3 years after purchase or completion of project, then screen annually; destroy material no longer needed for current business, with the following exception: transfer records with historical value to MSA every 3 years.
<b>Justification for Permanent Retention</b>	N/A

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**Schedule No.** *M409*  
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<b>Records Series Title:</b>  Legal Records	<b>Page 10 of 25</b>
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<b>Record Series Content</b>	Paper and electronic originals and copies of Opinions of Legal Counsel, Court Opinions, or Judgments
<b>Record Series Function</b>	Provides a record of legal matters affecting the town and opinions and decisions made regarding those matters
<b>Organization/Arrangement</b>	Case number and name and/or issue
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	
<b>Formats (paper, electronic, etc.)</b>	Paper and electronic
<b>Volume (file drawers, gigabytes, etc.)</b>	0.5 cubic feet Approximately 15 megabytes
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	Approximately 5 megabytes
<b>Current Location</b>	Town Office and server; town archive room
<b>Audit Requirements</b>	None
<b>Date Span</b>	1960 to present
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	10
<b>Retention</b>	Permanent. Retain 50 years after case resolution, then transfer to MSA.
<b>Justification for Permanent Retention</b>	These records reflect significant legal opinions, decisions, and actions in the town and therefore have historic importance and value to town officials, residents, and researchers.

<b>DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION RECORDS INVENTORY AND RETENTION SCHEDULE</b>	<b>Schedule No.</b> <i>M409</i> (To be completed by DGS/Records Management Division)
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<b>Records Series Title:</b>  <b>Insurance Records</b>	<b>Page 11 of 25</b>
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<b>Record Series Content</b>	Paper and electronic originals and copies of insurance policies, claims, and supporting information
<b>Record Series Function</b>	Provide a record of the town's insurance coverage and claims, including workers' compensation claims
<b>Organization/Arrangement</b>	By year
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper and electronic
<b>Volume (file drawers, gigabytes, etc.)</b>	1.5 cubic feet Approximately 324 megabytes
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	0.1 cubic feet 50 megabytes
<b>Current Location</b>	Town office and server; town archive room
<b>Audit Requirements</b>	Annual
<b>Date Span</b>	2002 to present
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	11
<b>Retention</b>	Retain 7 years after completion of policy or settlement of claim, then screen annually; destroy materials no longer needed for current business.
<b>Justification for Permanent Retention</b>	N/A

DEPARTMENT OF GENERAL SERVICES  
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Records Series Title:

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Vehicles and Equipment

Record Series Content	Original paper documents related to the purchase or lease of town vehicles and large equipment
Record Series Function	Provide a record of purchases/leases of assets that depreciate and used for valuation purposes
Organization/Arrangement	Type of asset
Indexing System	None
Restrictions (Law or Regulation Citation)	None
Formats (paper, electronic, etc.)	Paper
Volume (file drawers, gigabytes, etc.)	0.5 cubic feet
Annual Accumulation (file drawers, gigabytes, etc.)	< 0.2 cubic feet
Current Location	Town office
Audit Requirements	Annual
Date Span	2015 to present
Completeness /Gaps	Complete

Schedule Item Number	12
Retention	Retain 3 years after final disposition, then destroy.
Justification for Permanent Retention	N/A

<b>DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION RECORDS INVENTORY AND RETENTION SCHEDULE</b>	<b>Schedule No.</b> <i>m409</i> (To be completed by DGS/Records Management Division)
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<b>Records Series Title:</b>  <b>Election Returns</b>	<b>Page 13 of 25</b>
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<b>Record Series Content</b>	Paper originals and copies of election results showing the number of votes cast for each candidate or issue
<b>Record Series Function</b>	Provide a summary record of town election results
<b>Organization/ Arrangement</b>	By year and election date
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper
<b>Volume (file drawers, gigabytes, etc.)</b>	0.5 cubic feet
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	<0.1 cubic feet
<b>Current Location</b>	Town office and archive room
<b>Audit Requirements</b>	Bi-annual
<b>Date Span</b>	2000-Present
<b>Completeness /Gaps</b>	None

<b>Schedule Item Number</b>	13
<b>Retention</b>	Permanent. Retain 50 years, then transfer to MSA.
<b>Justification for Permanent Retention</b>	These records reflect citizen's decisions regarding who should lead their town and what issues they consider significant and, therefore, have historic importance and value to town officials, residents, and researchers.

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 (To be completed by DGS/Records Management Division)

Records Series Title:

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Voter Registration Records

Record Series Content	Paper originals and copies of voter registration documents for town residents
Record Series Function	Provide a record of individuals who were registered to vote in town elections during the covered time period
Organization/ Arrangement	By year
Indexing System	None
Restrictions (Law or Regulation Citation)	None
Formats (paper, electronic, etc.)	Paper
Volume (file drawers, gigabytes, etc.)	0.5 cubic feet
Annual Accumulation (file drawers, gigabytes, etc.)	<0.1 cubic feet
Current Location	Town office and archive room
Audit Requirements	Bi-annual
Date Span	1970; 2000 to Present
Completeness /Gaps	No records found for 1971-1999

Schedule Item Number	14
Retention	Retain 3 years, then destroy.
Justification for Permanent Retention	N/A

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**Schedule No.** *m409*  
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<b>Records Series Title:</b>  <b>Candidate Petitions</b>	<b>Page 15 of 25</b>
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<b>Record Series Content</b>	Paper originals and copies of submitted candidate petitions
<b>Record Series Function</b>	Provide a record of individuals who submitted paperwork to qualify as candidates in town elections
<b>Organization/ Arrangement</b>	By year and election date
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper
<b>Volume (file drawers, gigabytes, etc.)</b>	0.25 cubic feet
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	< 0.1 cubic feet
<b>Current Location</b>	Town office and archive room
<b>Audit Requirements</b>	Bi-annual
<b>Date Span</b>	2000 to present
<b>Completeness /Gaps</b>	None records prior to 2000

<b>Schedule Item Number</b>	15
<b>Retention</b>	Retain 3 years, then destroy.
<b>Justification for Permanent Retention</b>	N/A



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Schedule No. **m409**  
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<b>Records Series Title:</b>  Notice of Elections	<b>Page 16 of 25</b>
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<b>Record Series Content</b>	Paper originals and copies of notices for town elections
<b>Record Series Function</b>	Provide a record of notifications to town residents of upcoming elections, candidates, and issues
<b>Organization/ Arrangement</b>	Year and date of election
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper
<b>Volume (file drawers, gigabytes, etc.)</b>	0.25 cubic feet
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	< 0.1 cubic feet
<b>Current Location</b>	Town office and archive room
<b>Audit Requirements</b>	Bi-annual
<b>Date Span</b>	2000 to present
<b>Completeness /Gaps</b>	No records prior to 2000

<b>Schedule Item Number</b>	16
<b>Retention</b>	Retain 6 months, then destroy.
<b>Justification for Permanent Retention</b>	N/A

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Records Series Title:

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Ballots

Record Series Content	Paper originals and copies of ballots, including absentee ballots for all town elections
Record Series Function	Provide a record of election and voting activities in the town
Organization/Arrangement	By year and election date (2004 to present); by subject (prior to 2004)
Indexing System	None
Restrictions (Law or Regulation Citation)	None
Formats (paper, electronic, etc.)	Paper
Volume (file drawers, gigabytes, etc.)	0.25 cubic feet
Annual Accumulation (file drawers, gigabytes, etc.)	0.1 cubic feet
Current Location	Town office and archive room
Audit Requirements	Bi-annual
Date Span	2004 to present
Completeness /Gaps	Intermittent prior to 2004

Schedule Item Number	17
Retention	Retain for 6 months, then destroy.
Justification for Permanent Retention	N/A

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Schedule No. **M409**  
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Records Series Title:

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Special Accounting Records

<b>Record Series Content</b>	Paper and electronic (via Quickbooks) originals and copies of audit reports, tax returns, financial statements, final budgets, and general ledgers from 1980 to present
<b>Record Series Function</b>	Provide a record of town financial transactions and overall financial standing and condition
<b>Organization/ Arrangement</b>	By fiscal year and date
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper and electronic
<b>Volume (file drawers, gigabytes, etc.)</b>	3 cubic feet Approximately 20 megabytes
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	0.2 cubic feet 5 megabytes
<b>Current Location</b>	Town office and server; town archive room
<b>Audit Requirements</b>	Annual
<b>Date Span</b>	1980 to present
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	18
<b>Retention</b>	Permanent. Retain 50 years, then transfer to MSA.
<b>Justification for Permanent Retention</b>	These records reflect financial actions and condition of the town and therefore have historic importance and value to town officials, residents, and researchers.

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<b>Records Series Title:</b>  <b>General Accounting Records</b>	<b>Page 19 of 25</b>
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<b>Record Series Content</b>	Paper and electronic (via Quickbooks and AATRIx) originals and copies of routine business activities of town officials, such as paid bills, vouchers, invoices, bank statements, and budget-related working papers
<b>Record Series Function</b>	Provide a record of day-to-day financial transactions and decisions by town officials
<b>Organization/Arrangement</b>	By fiscal year and date
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper and electronic
<b>Volume (file drawers, gigabytes, etc.)</b>	3 cubic feet Approximately 80 megabytes
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	0.25 cubic feet 20 megabytes
<b>Current Location</b>	Town office and server; town archive room
<b>Audit Requirements</b>	Annual
<b>Date Span</b>	1978 to present
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	19
<b>Retention</b>	Retain 7 years, or until all audit requirements fulfilled, whichever is later, then destroy.
<b>Justification for Permanent Retention</b>	N/A

**DEPARTMENT OF GENERAL SERVICES  
RECORDS MANAGEMENT DIVISION  
RECORDS INVENTORY AND RETENTION SCHEDULE**

**Schedule No.** *m409*  
(To be completed by DGS/Records Management Division)

**Records Series Title:**

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**Financial Records, Historical**

<b>Record Series Content</b>	Paper originals and copies of early (dating back to the 1890s) town financial records, including budgets, financial statements, checks, invoices, and audit reports prior to 1980
<b>Record Series Function</b>	Provide a historical record of the town's financial activities and overall financial standing
<b>Organization/ Arrangement</b>	By collection or subject and year
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper
<b>Volume (file drawers, gigabytes, etc.)</b>	Approximately 1 cubic feet
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	N/A
<b>Current Location</b>	Town archive room
<b>Audit Requirements</b>	None
<b>Date Span</b>	1898 to 1979
<b>Completeness /Gaps</b>	Intermittent

<b>Schedule Item Number</b>	20
<b>Retention</b>	Permanent. Retain 50 years from approval of retention schedule, then transfer to MSA.
<b>Justification for Permanent Retention</b>	These records document the history of the town's financial activities, financial health, and growth since its establishment and therefore have historic interest and value to town officials, residents, and research.

<b>DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION RECORDS INVENTORY AND RETENTION SCHEDULE</b>	<b>Schedule No.</b> <i>m409</i> (To be completed by DGS/Records Management Division)
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<b>Records Series Title:</b>  <b>Personnel Records</b>	<b>Page 21 of 25</b>
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<b>Record Series Content</b>	Paper and electronic originals and copies of employee records, including applications, reference letters, correspondence, communications, disciplinary actions, training records, and other materials related to employment
<b>Record Series Function</b>	Provide a record of town employees and employment practices
<b>Organization/Arrangement</b>	By fiscal year, chronological by surname
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	Federal/State Employment Statutes
<b>Formats (paper, electronic, etc.)</b>	Paper, digital
<b>Volume (file drawers, gigabytes, etc.)</b>	2 cubic feet Approximately 170 megabytes
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	< 0.2 cubic feet Approximately 50 megabytes
<b>Current Location</b>	Town office and server; town archive room
<b>Audit Requirements</b>	Annual
<b>Date Span</b>	2002 to present
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	21
<b>Retention</b>	Retain until termination of employment plus 3 years, then destroy.
<b>Justification for Permanent Retention</b>	N/A

DEPARTMENT OF GENERAL SERVICES  
 RECORDS MANAGEMENT DIVISION  
 RECORDS INVENTORY AND RETENTION SCHEDULE

Schedule No. M409  
 (To be completed by DGS/Records Management Division)

Records Series Title: <b>Public Safety and Incident Reports</b>	Page 22 of 25
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Record Series Content	Paper originals and copies of public safety and incident reports
Record Series Function	Provide a record of community disturbances
Organization/Arrangement	Year, date of report
Indexing System	None
Restrictions (Law or Regulation Citation)	
Formats (paper, electronic, etc.)	Paper
Volume (file drawers, gigabytes, etc.)	0.25 cubic feet
Annual Accumulation (file drawers, gigabytes, etc.)	< 0.1 cubic feet
Current Location	Town office and archive room
Audit Requirements	None
Date Span	1969 to present
Completeness /Gaps	Intermittent based on occurrence

Schedule Item Number	22
Retention	Retain 10 years after completion of incident or settlement of claim, then screen annually; destroy material with no further legal or administrative value.
Justification for Permanent Retention	N/A

DEPARTMENT OF GENERAL SERVICES  
 RECORDS MANAGEMENT DIVISION  
 RECORDS INVENTORY AND RETENTION SCHEDULE

Schedule No. M409  
 (To be completed by DGS/Records Management Division)

Records Series Title: <b>Safe Route to Schools Grant</b>	Page 23 of 25
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<b>Record Series Content</b>	Paper and electronic originals and copies of research, proposals, drawings, construction documents, inspections, and grantor information for a sidewalk improvement project
<b>Record Series Function</b>	Provides details on a grant the town received to improve sidewalks and pedestrian safety
<b>Organization/ Arrangement</b>	By fiscal year and topic
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper and electronic
<b>Volume (file drawers, gigabytes, etc.)</b>	4 cubic feet Approximately 630 megabytes
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	0.25 cubic feet Approximately 100 megabytes
<b>Current Location</b>	Town office and server
<b>Audit Requirements</b>	Annual
<b>Date Span</b>	2013 to Present
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	23
<b>Retention</b>	Retain 7 years after end of grant funding period, then screen annually; destroy material no longer needed for current business.
<b>Justification for Permanent Retention</b>	N/A



**DEPARTMENT OF GENERAL SERVICES  
RECORDS MANAGEMENT DIVISION  
RECORDS INVENTORY AND RETENTION SCHEDULE**

Schedule No. *m4109*  
(To be completed by DGS/Records Management Division.)

<b>Records Series Title:</b>  Town Buildings and Structures	<b>Page 24 of 25</b>
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<b>Record Series Content</b>	Contains paper and electronic records related to town owned buildings (including grounds) and structures, with the bulk of records related to Penn Place and Town Hall
<b>Record Series Function</b>	Provide historical and operational information related to the acquisition and ongoing maintenance and operations of town owned structures, including Penn Place, which houses the Town Office
<b>Organization/Arrangement</b>	By building, subject, and year
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper and electronic
<b>Volume (file drawers, gigabytes, etc.)</b>	10 cubic feet Approximately 1.5 gigabytes
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	0.25 cubic feet Approximately 100 megabytes
<b>Current Location</b>	Town office and server; town archive room
<b>Audit Requirements</b>	None
<b>Date Span</b>	1973 to present
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	24
<b>Retention</b>	Permanent. Retain 50 years from approval of Records Retention Schedule, then transfer to MSA.
<b>Justification for Permanent Retention</b>	Provide not only historical information of interest to residents and researchers but also information to support ongoing maintenance of operations of these buildings.

**DEPARTMENT OF GENERAL SERVICES  
RECORDS MANAGEMENT DIVISION  
RECORDS INVENTORY AND RETENTION SCHEDULE**

**Schedule No.** M409  
(To be completed by DGS/Records Management Division)

<b>Records Series Title:</b>  Public Works	<b>Page 25 of 25</b>
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<b>Record Series Content</b>	Contains paper and electronic records related to activities and projects related to public works, such as storm drains, traffic and streets, parks, solid waste and recycling, easements, and snow removal
<b>Record Series Function</b>	Provide historical and operational information related to public services and the ongoing operations and maintenance of public spaces
<b>Organization/Arrangement</b>	By project or activity and year
<b>Indexing System</b>	None
<b>Restrictions (Law or Regulation Citation)</b>	None
<b>Formats (paper, electronic, etc.)</b>	Paper and electronic
<b>Volume (file drawers, gigabytes, etc.)</b>	8 cubic feet Approximately 1 gigabyte
<b>Annual Accumulation (file drawers, gigabytes, etc.)</b>	1 cubic foot Approximately 100 megabytes
<b>Current Location</b>	Town office and server; town archive room
<b>Audit Requirements</b>	None
<b>Date Span</b>	1900 to present
<b>Completeness /Gaps</b>	Complete

<b>Schedule Item Number</b>	25
<b>Retention</b>	Retain 3 years after completion of project or activity and no longer needed, then destroy, with the following exception: transfer records with historical value to MSA every 3 years.
<b>Justification for Permanent Retention</b>	Some records may not only provide historical information of interest to residents and researchers but also information to support and inform ongoing public works projects in and around the town.