

RECORDS INVENTORY AND RETENTION SCHEDULE COVER SHEET

Schedule Number <small>(To be completed by DGS/Records Management Division)</small>	M 437
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Agency Information

Department / Agency	Town of Glen Echo
Division / Unit	
Mission Statement/Link to division/unit website	https://glenecho.org/

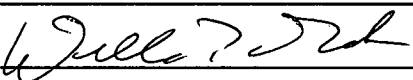
Schedule Information

Supersedes Schedule(s)	N/A
Amends Schedule(s)	N/A

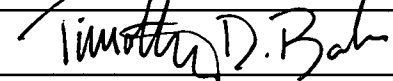
Preparer Information

Name of Preparer	Elizabeth Boa
Title of Preparer	Town Clerk-Treasurer
Preparer Email Address	townhall@glenecho.org
Preparer Telephone Number	301-320-4041
Date Nov. 18, 2019	11/18/2019

Agency Approval

Name of Agency Director	Hon. Willem Polak, Mayor
Agency Director Signature	
Date	Nov. 18, 2019

State Archivist Approval

State Archivist Signature	
Date	1.6.2020

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

Schedule No. M437
(To be completed by DGS/Records Management Division)

Records Series Title:
Accounting Records, General

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Record Series Content	All financial accounting material outside of Audits and Assessments
Record Series Function	Accounting and Bookkeeping records forming a part of the day-to-day bookkeeping process.
Organization/Arrangement	Alphabetical by subject, then Chronological
Indexing System	N/A
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 13 file drawers Approximately 1/2 gig
Annual Accumulation (file drawers, gigabytes, etc.)	Approximately 1 file drawer Approximately 5 MB
Current Location	Town Hall
Audit Requirements	Yes
Date Span	1904 to present
Completeness /Gaps	Complete to the best of our knowledge.

Schedule Item Number	1
Retention	Retain for seven (7) years, then screen annually and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, historical, legal, or operational value.
Justification for Permanent Retention	Selected correspondence having research value in documenting the historical development and accomplishments of the municipality.

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

Schedule No. **m437**
(To be completed by DGS/Records Management Division)

Records Series Title:
Accounting Records, High Level

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Record Series Content	High-level accounting records and reports including but not limited to Annual Financial Reports including those to Local and State Agencies; Assessment Books; Audit Reports; Books of Final Entry – General Ledgers
Record Series Function	Audit, Accounting, and Bookkeeping records with form a part of the Town's annual audit final report.
Organization/ Arrangement	Alphabetical, then Chronological
Indexing System	N/A
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 2 file drawers Approximately 100 MB
Annual Accumulation (file drawers, gigabytes, etc.)	Approximately 2 file folders Approximately 10 MB
Current Location	Town Hall
Audit Requirements	Yes
Date Span	1904 to present
Completeness /Gaps	Complete to the best of our knowledge.

Schedule Item Number	2
Retention	Permanent. Retain for ten (10) years and then transfer to Maryland State archives
Justification for Permanent Retention	This series documents the financial history of the Town and shows compliance with statutes.

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

Schedule No. m 437
(To be completed by DGS/Records Management Division)

Records Series Title:
Deeds and Agreements

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Record Series Content	Deeds of property and agreements between the Town and individuals/entities
Record Series Function	Documents Town's real property ownership.
Organization/ Arrangement	Alphabetical, then Chronological
Indexing System	N/A
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 2 filed drawers Approximately 1 MB
Annual Accumulation (file drawers, gigabytes, etc.)	No consistent accumulation
Current Location	Town Hall
Audit Requirements	No
Date Span	1891 to present
Completeness /Gaps	Complete to the best of our knowledge.

Schedule Item Number	3
Retention	Permanent. Retain for ten (10) years and then transfer to Maryland State archives
Justification for Permanent Retention	Annotated Code of Maryland State Government §9-1011 sets the State Archives as the central depository for deeds related to real property acquired by the State. Similarly, this series will maintain a permanent record of real property acquired by the Town. Agreements are maintained permanently to document any permanent obligations assigned by those agreements.

DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION RECORDS INVENTORY AND RETENTION SCHEDULE	Schedule No. <u>M437</u> (To be completed by DGS/Records Management Division)
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Records Series Title: <u>Building Permits and Infrastructure Projects, Plans, Correspondence and Communication</u>	Page 4 of 13
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Record Series Content	All documents pertaining to Building Permits and Major Infrastructure Projects
Record Series Function	Documents compliance with and exceptions to Town Building Regulations
Organization/Arrangement	Address, then Chronological
Indexing System	N/A
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 15 file drawers Approximately 500 MB
Annual Accumulation (file drawers, gigabytes, etc.)	Approximately 1/2 file drawer Approximately 1 MB
Current Location	Town Hall
Audit Requirements	No
Date Span	1906 to present
Completeness /Gaps	Complete to the best of our knowledge.

Schedule Item Number	4
Retention	Permanent. Retain for fifteen (15) years and then transfer to Maryland State archives
Justification for Permanent Retention	The Town building records set legal precedents with regard to building regulations within the Town. Records are necessary for reference as footprints of structures evolve.

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

Schedule No. M437
(To be completed by DGS/Records Management Division)

Records Series Title:
Departmental Operations

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Record Series Content	Operational documentation of elected officials and emergency services.
Record Series Function	Documents elections and emergency services within the Town.
Organization/ Arrangement	Subject, then Alphabetical, then Chronological
Indexing System	N/A
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 6 file drawers Approximately 1 MB
Annual Accumulation (file drawers, gigabytes, etc.)	Approximately 1 file folder Approximately 500 KB
Current Location	Town Hall
Audit Requirements	No
Date Span	1907 to present
Completeness /Gaps	Complete to the best of our knowledge.

Schedule Item Number	5
Retention	Retain ballots for 60 days and all other records for three (3) years, then screen annually and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, historical, legal, or operational value.
Justification for Permanent Retention	Selected correspondence having research value in documenting the historical development and accomplishments of the municipality.

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

Schedule No. m437
(To be completed by DGS/Records Management Division)

Records Series Title:
General Correspondence and Communications not related to another Record Series

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Record Series Content	Original incoming letters, copies of outgoing letters, memoranda, studies, reports, surveys, investigations, press releases, newspaper clippings, legislative reference material, directives, invoices and other miscellaneous correspondence relating to the administration of the Town. This includes electronic correspondence.
Record Series Function	All incoming and outgoing correspondence not related to another record series.
Organization/Arrangement	Subject, then Alphabetical, then Chronological
Indexing System	N/A
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 30 file drawers Approximately 3 gigs
Annual Accumulation (file drawers, gigabytes, etc.)	Approximately 1 file drawer Approximately 500 MB
Current Location	Town Hall
Audit Requirements	No
Date Span	1920 to present
Completeness /Gaps	Complete to the best of our knowledge.

Schedule Item Number	6
Retention	Retain for one (1) year. Screen annually and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, historical, legal, or operational value.
Justification for Permanent Retention	Selected correspondence having research value in documenting the historical development and accomplishments of the municipality.

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

Schedule No. M437
(To be completed by DGS/Records Management Division)

Records Series Title: <u>Insurance</u>	Page 7 of 13
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Record Series Content	Documentation and Correspondence relating to insurance for property, general liability, workers compensation and bonds. Workers' Compensation including claims, incident reports, correspondence, medical reports, invoices and medical authorization forms.
Record Series Function	Documents insurance coverage and claims in the Town.
Organization/Arrangement	Subject, then Alphabetical, then Chronological
Indexing System	N/A
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 2 file drawers Approximate 1 MB
Annual Accumulation (file drawers, gigabytes, etc.)	Approximately 1 file folder Approximate 1 KB
Current Location	Town Hall
Audit Requirements	Yes
Date Span	1960 to present
Completeness /Gaps	Complete to the best of our knowledge.

Schedule Item Number	7
Retention	Retain seven (7) years, then screen annually and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, historical, legal, or operational value.
Justification for Permanent Retention	Selected correspondence having research value in documenting the historical development and accomplishments of the municipality.

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

Schedule No. m4371
(To be completed by DGS/Records Management Division)

Records Series Title:
Legal Opinions and Litigation

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Record Series Content	All correspondence, legal documents, written opinions and rendered by the Town Attorney at the request of the Mayor and litigation cases involving the Town
Record Series Function	Documents legal issues and precedents in the Town.
Organization/Arrangement	Alphabetical, then Chronological
Indexing System	N/A
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 8 file drawers Approximately 10 MB
Annual Accumulation (file drawers, gigabytes, etc.)	Approximately 1 file folder Approximately 1 MB
Current Location	Town Hall
Audit Requirements	Yes
Date Span	1917 to present
Completeness /Gaps	Complete to the best of our knowledge.

Schedule Item Number	8
Retention	Retain for seven (7) years, then screen annually and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, historical, legal, or operational value.
Justification for Permanent Retention	Selected correspondence having research value in documenting the historical development and accomplishments of the municipality.

DEPARTMENT OF GENERAL SERVICES RECORDS MANAGEMENT DIVISION RECORDS INVENTORY AND RETENTION SCHEDULE	Schedule No. <u>m437</u> <small>(To be completed by DGS/Records Management Division)</small>
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Records Series Title: <u>Legislation</u>	Page 9 of 13
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Record Series Content	Charter, charter amendments, ordinances, resolutions, and Town Code with amendments adopted by the Council with supporting and background documents, if any.
Record Series Function	Documents the evolution of Town legislation.
Organization/Arrangement	Subject, then Alphabetical, then Chronological
Indexing System	N/A
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 8 file drawers Approximately 100 MB
Annual Accumulation (file drawers, gigabytes, etc.)	Approximately 1/2 file folder Approximately 500 KB
Current Location	Town Hall
Audit Requirements	Yes
Date Span	1906 to present
Completeness /Gaps	Complete to the best of our knowledge.

Schedule Item Number	9
Retention	Permanent. Retain for seven (7) and then transfer years to Maryland State Archives.
Justification for Permanent Retention	Serves as a complete record of the laws of the Town.

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

Schedule No. M. 437
(To be completed by DGS/Records Management Division)

Records Series Title:
Minutes

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Record Series Content	Minutes of Town Meetings and Appointed Committees
Record Series Function	Documents Town decisions, resolutions, and history.
Organization/ Arrangement	Chronological
Indexing System	N/A
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 12 Archival File Boxes (15x10x5) Approximately 1 gig
Annual Accumulation (file drawers, gigabytes, etc.)	Approximately 1 folder; Approximately 300 MB
Current Location	Town Hall
Audit Requirements	Yes
Date Span	1904 to present
Completeness /Gaps	Complete to the best of our knowledge.

Schedule Item Number	10
Retention	Permanent. Retain for ten (10) years and then transfer to Maryland State archives
Justification for Permanent Retention	Documents the decisions and activities of the Town Council, Town Manager, and Town Committees

**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
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Schedule No. **m.437**
(To be completed by DGS/Records Management Division)

Records Series Title:
Procurements

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Record Series Content	Quotations/Invitations to Bid including all related documents	
Record Series Function	Documents contracts for services procured by the Town.	
Organization/Arrangement	Subject, then Alphabetical, then Chronological	
Indexing System	N/A	
Restrictions (Law or Regulation Citation)	N/A	
Formats (paper, electronic, etc.)	Paper and Electronic	
Volume (file drawers, gigabytes, etc.)	Approximately 2 file drawers Approximately 10 MB	
Annual Accumulation (file drawers, gigabytes, etc.)	Approximately 1 file folder Approximate 1 MB	
Current Location	Town Hall	
Audit Requirements	Yes	
Date Span	1924 to present	
Completeness /Gaps	Complete to the best of our knowledge.	

Schedule Item Number	11
Retention	Retain for seven (7) years after contract completion or until audit requirements have been met, whichever is later, then screen annually and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, historical, legal, or operational value..
Justification for Permanent Retention	Selected correspondence having research value in documenting the historical development and accomplishments of the municipality.

**DEPARTMENT OF GENERAL SERVICES
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Schedule No. **M-437**
(To be completed by DGS/Records Management Division)

Records Series Title:
Town Publications

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Record Series Content	Town journal, handbook, directories and various notices to the press and general public regarding current events
Record Series Function	Documents history of the Town.
Organization/Arrangement	Alphabetical by Title
Indexing System	N/A
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 8 file drawers Approximately 500 MB
Annual Accumulation (file drawers, gigabytes, etc.)	Approximately 1 file folder Approximately 1 MB
Current Location	Town Hall
Audit Requirements	No
Date Span	1948 to present
Completeness /Gaps	Complete to the best of our knowledge.

Schedule Item Number	12
Retention	Retain for seven (7) years, then screen annually and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, historical, legal, or operational value..
Justification for Permanent Retention	Selected correspondence having research value in documenting the historical development and accomplishments of the municipality.

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

Schedule No.

(To be completed by DGS/Records Management Division)

Records Series Title:
Personnel Records

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Record Series Content	Employee Records other than payroll records
Record Series Function	Documents employment history of personnel.
Organization/ Arrangement	Alphabetical by Name
Indexing System	
Restrictions (Law or Regulation Citation)	N/A
Formats (paper, electronic, etc.)	Paper and Electronic
Volume (file drawers, gigabytes, etc.)	Approximately 1 file drawer Approximately 10 MB
Annual Accumulation (file drawers, gigabytes, etc.)	Minimal annual accumulation
Current Location	Town Hall
Audit Requirements	No
Date Span	2000 to present
Completeness /Gaps	No records were found prior to 2000.

Schedule Item Number	13
Retention	Retain for seven (7) years after employment end or until audit requirements have been met, whichever is later, then screen annually and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, historical, legal, or operational value..
Justification for Permanent Retention	Selected correspondence having research value in documenting the historical development and accomplishments of the municipality.