

Conservation District Retention Record Schedule				
Code	Type and Description of Record	Retention Length	District Docs	Archival Review
ADM-BFI-02	Building Files - Records related to government owned buildings and facilities including capital improvements, as-built or as-constructed drawings, does not include routine maintenance.	LOA 10 Years after life of asset	District facility files fall under this.	YES
ADM-COM-07	Publicity and Promotion - Records related to marketing the government including advertising and public relations with the media including newspapers, television, magazines, etc.	CR 5 Years after create date then destroy.	Newspaper, newsletter articles, event fliers, recorded radio ads, and social media.	YES
ADM-EVM-01	Equipment Files - Records related to equipment including history, logs, manuals and operating procedures.	LOA 5 Years after life of asset then destroy.	Files for equipment (drill, chute, etc.). Logs to include rental agreements.	NO
ADM-EVM-02	Maintenance and Repairs - Records related to maintenance and repair of vehicles and equipment.	CP 5 Years after completion then destroy.	All maintenance on vehicles and equipment	NO
ADM-EVM-04	Vehicle Files - Records related to vehicles including history, logs, manuals and operating procedures.	LOA 5 Years after life of asset then destroy.	Vehicle File	NO
ADM-GMT-02	Calendars and Schedules - Records related to appointments, task lists, and meeting schedules.	OBS 5 Years after obsolete then destroy.	Website calendars, google calendars, employee planners.	NO
ADM-GMT-03	Correspondence - Directors - Records related to internal and external communications to or from the directors and/or management of policy issues, concerns and issues, and actions taken.	PERM Keep forever, never destroy.	Employee in charge of the District, and associated correspondence	NO
ADM-GMT-04	Correspondence - Elected Officials - Records related to Internal and external communications to or from the elected officials of policy issues, concerns and issues, and actions taken.	PERM Keep forever, never destroy	Board supervisor communications.	NO
ADM-GMT-05	Correspondence - General - Records related to routine correspondence of day-to-day office administration and not identified in other record series.	CR 3 years after create date then destroy.	All inner office communications or communications with the public if it doesn't fit another schedule kind of a catch all.	YES
ADM-GMT-06	Distribution, Mailing and Contact Lists - Records related to lists of individuals and organizations for mailing or distribution.	SUP 3 Years after superseded then destroy	Email contact lists, website contact lists (newsletters)	YES
ADM-GMT-07	Event Management - Records related to the organization and conduct of events including facility scheduling, registrations and confirmations, flyers and brochures, presentation material, and other related documents.	CP 3 Years after completion then destroy	Expos, workshops, etc. All documents related to an event	YES
ADM-GMT-08	Historical - Records related to documenting the history or development of an agency, office, program or event.	PERM Keep forever, never destroy	Items for events with historical value	NO
ADM-GMT-11	Logs - Records related to logs used to monitor or control.	CR 3 years after create date then destroy.	Office visitation logs, daily roster sheets/shift log, daily call logs/activity reports, shipments log	NO
ADM-GMT-12	Meeting Management - Records related to the management of meetings including minutes, agendas, and notices.	CR 3 years after create date then destroy.	Agendas, and notices, meeting logs for any non-official meetings (staff meetings)	YES
ADM-GMT-15	Organization - Records related to the organization structure including reorganizations.	PERM Keep forever, never destroy	Board organization, District organization chart and any restructure.	NO
ADM-GMT-20	Reference Material - Records related to information received from other agencies, commercial or private entities and/or other reference materials which are maintained solely for ease of access and reference	OBS 3 Years after obsolete then destroy.	Any government documents or references (RMP/Forest Plans, etc.) Private conservation planning or private land projects.	YES

ADM-GMT-22	Reports - General - Records related to general reports not identified in other record series.	CR 5 Years after create date then destroy.	Non grant and non financial related documents	YES
ADM-GMT-28	Reports - Annual Agency - Records related to annual reports not identified in other record series.	PERM Keep forever, never destroy.	Yearly Plan of Work and Annual Reports.	YES
ADM-GMT-29	Affidavits of Publication - Records related to affidavits of publication and legal notices.	CP 5 Years after completion then destroy	Budget notices, grant publications, regular and special meeting notices.	NO
ADM-ITS-07	Systems and Networks - Records related to development and maintenance of voice and data networks, infrastructure and computer applications including both internally developed and externally acquired.	SUP 5 Years after superseded then destroy	Computer programs and maintenance agreements, server or cloud based agreements	NO
ADM-ITS-10	Geographic Information Systems (GIS)- Records related to geographic information systems (GIS)	CP 22 Years retain after completion	GIS files	YES
ADM-RSK-01	Accidents and Property Damage - Records related to reporting damage to State/Government owned property including claims.	CP 5 Years after completion then destroy	WSA is reviewing the need for this schedule.	NO
ADM-RSK-03	Incident Management - Records related to incidents involving property and assets.	CP 10 Years after completion then destroy	Accidents and Property Damage incidents	NO
ADM-RSK-05	Insurance Policies - Records related to insurance of government property and assets including insurance policies, riders, renewals, and communication with insurance providers, policies, riders, renewals insurance placement, advice from or to insurers, and training on insurance products and services for automobile insurance, property insurance and liability insurance.	EXP 10 Years after expiration then destroy	LGLP and Commercial Insurance Policies.	NO
EMP-BEN-01	Claims - Records related to employee benefit claims.	CP 10 Years after completion then destroy	Any claim from an employee benefit offered by the agency	NO
EMP-BEN-02	Enrollment - Records related to employee enrollment in government benefit plans.	CP 5 Years after completion then destroy	Employee enrollment forms for benefits. Non retirement/pension. 1095b forms	NO
EMP-BEN-04	Plans - Records related to employee benefit plans and statements.	SUP 5 Years after superseded then destroy	Plan information such as coverages, deductables, providers, etc. Non retirement/pension.	NO
EMP-PER-04	Evaluation - Performance - Records related to performance evaluations.	CP 10 Years after separation then destroy.	Goals reviews or performance appraisals.	NO
EMP-PER-07	Grievances and Investigations - Records related to filing of grievances and investigations related to employees.	CP 7 Years after separation then destroy.	Use EMP-PER-22 WSA will investigate this schedule.	NO
EMP-PER-08	I-9's - Records related to employment eligibility verification federal form I-9.	TE 3 Years after separation then destroy	I-9 forms	NO
EMP-PER-11	Medical Records - Records related to employee medical records.	TE 30 Years after separation then destroy	Doctor's notes for medical release.	NO
EMP-PER-14	Personnel Files - Short Term (Interns) - Records related to individual employee includes copies of job descriptions, resumes, offer letters, terms and conditions of employment, references, applications, resignations, terminations, retirement, attendance issues, employee feedback, emergency contact info, salary changes, commendations, disciplinary reports, investigations, compensation history, and leave of absences, does not include medical files.	TE 5 Years after separation then destroy.	Use EMP-PER-22 WSA will investigate this schedule.	NO
EMP-PER-18	Time and Attendance - Records related to reporting and approving employee attendance.	CYE 5 Years after calendar year end then destroy	Submitted timesheets.	NO
EMP-PER-20	Volunteer Files - Records related to volunteers.	TE 5 Years after separation then destroy.	All contracts/paperwork with volunteers.	NO

EMP-PER-22	Personnel Files - Long Term - Records related to individual employee includes copies of job descriptions, resumes, offer letters, terms and conditions of employment, references, applications, resignations, terminations, retirement, attendance issues, employee feedback, emergency contact info, salary changes, commendations, disciplinary reports, investigations, compensation history, and leave of absences, does not include medical files.	CP 10 Years after separation then destroy.	Everything in our employee folders - Look into retirement --- contribution change forms	NO
EMP-PER-24	Employee Bonds - Records related to employee bonds including blanket and continuation performance bonds.	EXP 10 Years after expiration then destroy	Blanket bond for employees WDA requirement.	NO
EMP-PRL-01	Deductions and Garnishments - Records related to deduction and garnishments from employee paychecks.	EXP 5 Years after expiration then destroy.	Child support, tax garnishments, employer garnishments. W4's	NO
EMP-PRL-03	Reports - Payroll - Records related to reports for payroll including registers.	CYE 7 Years after calendar year end then destroy	Payroll packets and associated reports, this includes the W-3 & W-2s	NO
EMP-RPA-01	Contributions - Employee - Records related to employee contributions to retirement or pension funds.	CYE 50 Years after calendar year then destroy	WRS voucher and any change in contributions documents.	NO
EMP-RPA-02	Member Files - Records related to membership in retirement or pension funds and plans.	TE 60 Years after separation then destroy	Contribution set up forms, and plan information	NO
EMP-SAR-01	Applicants - Not Hired - Records related for applicants not hired.	CYE 3 Years after calendar year then destroy.	All applicants for all positions.	NO
EMP-SAR-04	Positions and Classifications - Records related to preparation of job descriptions and position classification and reclassification.	SUP 5 Years after superseded then destroy	Drafts and final copies related to redesigning or creating a position description.	NO
EMP-SAR-06	Vacancy Announcements - Records related to announcements for job or position vacancies and openings.	CP 2 Years after completion then destroy	Job announcements and postings on any platform.	NO
EMP-WCU-01	Claims - Records related to workers compensation and unemployment claims.	CP 5 Years after completion then destroy	Should be separate from employee file.	NO
FIN-ACC-07	Ledgers - General - Records relating to ledgers for general ledger management including daily postings and month/year end details.	PERM Keep forever, never destroy	Master Ledger/Books	YES
FIN-ACC-08	Ledgers - Subsidiary - Records relating to ledgers for payments and receipts, cash management, check management, advances, journal entries, general ledger management, month end details and all forms of payment, and the recording of payments or disbursements.	FYE 6 Years after the fiscal year end then destroy	Deposit books, petty cash ledger, etc.	NO
FIN-ACC-09	Accounts Payable - Records relating to payable accounts including vouchers, warrants, correspondence, billings, packing slips, copies of financial transactions and other supporting documentation arranged by supplier or object of expenditure.	FYE 7 Years after the fiscal year end then destroy	This is all the backup to the blanket voucher. The voucher/approval form itself is a part of the minutes and kept for ever. This also includes the 1096 & 1099s.	NO
FIN-ACC-10	Reports - Accounting - Records related to accounting processes and controls.	FYE 5 Years after the fiscal year end then destroy.	WDA reporting requirements	NO
FIN-ACC-11	Reports - Annual - Records related to financial reporting including financial management reports, statistics and statements, working papers, correspondence, and memoranda.	FYE 10 Years after the fiscal year end then destroy	Project/grant reports	NO

FIN-ACC-12	Accounts Receivable and Revenue - Records related to the control of recoverable amounts and potential revenues including revenue and suspense accounts, recoverable amounts, etc.	FYE 7 Years after the fiscal year end then destroy	Payment - all are in grant files other than tree sales. Tree sales, product sales, and equipment rental income, office rental income. Mill levy remittance statements.	NO
FIN-BNK-01	Bank Relationship - Records relating to the establishment, maintenance, and termination of bank accounts including procedures used for conducting banking operation.	CP 2 Years after completion then destroy	Opening and closing accounts with banks, credit cards.	NO
FIN-BNK-04	Statements and Reports - Records related to bank account and credit card statements and reconciliations.	FYE 5 Years after the fiscal year end then destroy.	Bank statements.	NO
FIN-BUD-01	Annual - Records related to agency annual budgets	FYE 5 Years after the fiscal year end then destroy.	Final Annual Budgets	NO
FIN-BUD-04	Workpapers - Records related to budget workpapers and supporting documentation.	FYE 5 Years after the fiscal year end then destroy.	Drafts and reports to create budget.	NO
FIN-CUS-01	Customer Files - Records related to customer accounts including applications.	CP 5 Years after completion then destroy	Tree program application/order forms. Equipmental rental and costshare agreements	NO
FIN-FSR-01	Annual - Financial Statements and Reports - Records related to annual financial reports and statements.	FYE 5 Years after the fiscal year end then destroy.	WSA is reviewing the need for this schedule.	NO
FIN-FSR-02	Audited - Records related to audited financial reports and statements.	PERM Keep forever, never destroy	Audits of the CD	NO
FIN-FSR-03	Reconciliations and Balancing - Records related to reconciliations and balancing for financial reports and statements.	FYE 5 Years after the fiscal year end then destroy.	Accounting software reconciliation reports.	NO
FIN-GRM-01	Grant Files - Records related to grant files general.	CP 10 Years after completion then destroy	Contracts, correspondence, payments in and out, access agreements, and all reports.	NO
FIN-GRM-05	Grant Files - Federal - Records related to federal grant files; per Uniform Guidance - §200.334, which specifies start dates for retention periods by category.	CP 3 Years after completion then destroy	Federal Grants and 319, NRCS, BLM, USFS.... Contracts, correspondence, payments in and out, access agreements, and all reports.	NO
FIN-INV-07	Statements and Reports - Records related to investment statements and reports	FYE 5 Years after the fiscal year end then destroy.	WGIF and any other investments fund that the District uses.	NO
FIN-PRO-01	Bid Proposal and Quotes - Records related to bid, quotes and proposals declined. Approved documents maintained with contracts or purchase.	CP 4 Years after completion then destroy	Any and all bids and quotes.	NO
FIN-PRO-03	Vendor Management - Records related to management of vendors including vendor correspondence material, catalogs, and pricelists.	EXP 5 Years after expiration then destroy.	Correspondence, price lists, catalogs	NO
FIN-TAX-05	Exemptions - Records related to exemptions from taxation.	EXP 3 Years after expiration then destroy	Tax exemption documents, sales tax agreements/certificate	YES
FIN-TAX-12	Sales and Use - Records related to sales and use tax assessments.	FYE 5 Years after the fiscal year end then destroy.	Sale tax records.	NO
FIN-TAX-13	Tax Assessments - Records related to the general assessment of taxes.	FYE 10 Years after the fiscal year end then destroy	WID and district tax assessments.	NO
GAC-ELM-03	Applications - Records related to election applications.	OBS 5 Years after obsolete then destroy.	Applications for WID directors and Board Supervisors	NO
GAC-ELM-04	Appointments - Records related to appointments	OBS 5 Years after obsolete then destroy.	Appointment for WID directors and Board Supervisors	NO
GAC-ELM-07	Petitions - Records related to petitions.	CP 5 Years after completion then destroy	WID or District Boundaries change petitions	NO
GAC-ELM-11	Voter Registration - Records related to voter registration.	SUP 3 Years after superseded then destroy	WID voter lists from county clerk and landowner written authorization.	NO

GAC-ELM-12	Ballots and Poll Books - Records related to the reporting on the administration and management of elections.	CP 2 Years after completion then destroy	WID Elections	NO
GAC-GOV-03	Minutes, Resolutions, and Ordinances - Records related to official minutes, agendas, resolutions, and ordinances.	PERM Keep forever, never destroy	All documents mentioned or referred to in the meeting minutes (blanket voucher, NRCS Reports, Staff reports, meeting logs)	NO
GAC-GOV-04	Oaths of Office-Records relating to oaths of office.	PERM Keep forever, never destroy	Oaths of Office	No
GAC-GOV-05	Articles of Organization - Records related to articles of organization.	PERM Keep forever, never destroy	WID and District formation documents.	NO
GAC-HRM-02	ADA Accommodations - Records related to accommodations for disabilities under the Americans with Disabilities Act.	CP 5 Years after completion then destroy	ADA requests	NO
GAC-HRM-03	Affirmative Action/EEOC - Records related to compliance with the Equal Employment Opportunity Commission.	CR 5 Years after create date then destroy.	Any documents that have the EEOC statement on it such as a job posting	NO
GAC-ISP-04	Buildings and Construction - Records related to inspections and monitoring of building and construction.	CP 5 Years after completion then destroy	Annual inspections, code inspections, FEMA, HLS	YES
GAC-ISP-07	Fire and Electrical - Records related to inspection for fire prevention and fire protection for buildings, facilities, and structures including fire reports, etc.	CP 5 Years after completion then destroy	Annual sprinkler reports, extinguisher inspections, fire investigations.	NO
GAC-PSM-01	Memorandums, Orders and Directives - Records related to memorandums, orders and directives.	PERM Keep forever, never destroy	MOU's and Memorandums from the District Board	NO
GAC-PSM-02	Policies, Procedures and Manuals - Records related to policies and procedures of routine and day to day operations.	SUP 5 Years after superseded then destroy	Handbook, district policy, updates and changes made to them.	YES
LGL-CTR-04	General - Records related to contracts of janitorial, maintenance, or other program or operation services directly related to ongoing activities.	EXP 10 Years after expiration then destroy	Janitorial, printer leases, electronic equipment.	NO
LGL-CTR-05	Contracts - Good and Services - Records related to contracting of goods and services.	EXP 10 Years after expiration then destroy	Building maintenance, project contractors, professional services (water sampling, surveying)	NO
LGL-CTR-08	Leases - Records related to leases, does not include mineral leases.	EXP 10 Years after expiration then destroy	District owned equipment that is leased to landowners, or equipment that districts lease from a vendor. Office space owned by District leased to NRCS or others, or office space that the district leases.	NO
LGL-LAR-22	General - Licensing and Registration - Records related to general licenses; Register of County Licenses (Issued by the County).	EXP 5 Years after expiration then destroy.	Nursery license, or any professional license paid for by the District (drone, pesticide)	NO
LGL-LAR-26	Motor Vehicles - Titles - Records related to motor vehicle titles.	CP 3 Years after completion then destroy	Vehicle, UTV, ATV, and trailer titles.	NO
LGL-LAR-30	Motor Vehicles - Registration - Records related to motor vehicle registration.	EXP 5 Years after expiration then destroy.	Vehicle, UTV, ATV, and trailer registrations.	NO
LGL-LAR-31	Notary - Records related to licenses for notaries.	EXP 5 Years after expiration then destroy.	Notary license, stamps, books and other documentation.	NO
NRM-LWR-07	Plats and Maps - Records related to plats and maps.	PERM Keep forever, never destroy	All recommendation letters, draft plats and other documentation for subdivision reviews.	NO