

VILLAGE OF HEWITT

Hewitt, Wisconsin 54441

RESOLUTION 3-1989 – Amended October 2018

RECORDS RETENTION/DISPOSITION SCHEDULE

PURPOSE: **PURPOSE:** This Resolution was developed to provide a retention schedule for Village of Hewitt records following guidelines for complying with legal, fiscal, and archival requirements for maintaining important documents. Records are a basic tool of transacting business on behalf of all local government units. They are the foundation for government accountability. Records management is regulated by Wisconsin state law, and accordingly, the Wisconsin Municipal Records Schedule (WMRS) provides legal authorization to dispose of records on a regularly scheduled basis. The schedule serves as a mechanism for consistent retention and disposition of similar types of records for local municipalities. A copy of scheduled items applicable to the Village is attached.

DEFINITION:

Record: Records are defined by Wisconsin Statute 19.32(2) as “any material on which written, drawn, printed, spoken, visual or electromagnetic information or electronically generated or stored data is recorded or preserved, regardless of physical form or characteristics, that has been created or is being kept by an authority.” Public records are also defined as being “all books, papers, maps, photographs, films, recordings, optical discs, electronically formatted documents, or other documentary materials, regardless of physical form or characteristics made or received by any state agency or its officers or employees in connection with the transaction of public business” (Wis. Stat.16.61(2)(b)).

Permanent Record(s): Records considered as “permanent” have been identified as containing significant historical information and long term business value. Therefore municipalities are responsible for ensuring the long-term preservation of these records.

Procedure: The Village of Hewitt by adoption of Resolution 3-1989 Amendment (October, 2018) shall follow the following records retention/disposition schedule maintaining Village records in a safe and orderly manner until such time records are disposed per schedule. Records for disposition shall be reviewed by the Village of Hewitt board prior to disposition.

Adopted this 9th day of October, 2018

Village President Charles Stuebel

Village Clerk Susan Hasenfang

RECORDS RETENTION/DISPOSITION SCHEDULE

Record Title	Record Description	Retention
<i>ADMINISTRATION</i>		
Minutes-Board	Official minutes of the Village Board	Permanent
Ordinances	Official ordinances and any ordinance books kept by the Village	Permanent
Resolutions	Official records pertaining to resolutions passed by the Village	Permanent
Guidelines	Official records pertaining to guidelines established by the Village	Until superseded
Audio Tapes	Recordings of meeting used to produce minutes	Date minutes have been approved
Affidavits of Publication	Records providing proof of publication for legal notices as required by law	Date of publication + 7 years
Committee Records & Agenda & Minutes	Records of committees other than Village Board	Creation + 7 years
External written complaints	File related to external written complaints regardless of issue	2 years
Contracts/Agreements	Any contract or agreement to which the Village is a party	6 years
Correspondence	Business related correspondence (paper or electronic)	6 months
Open Records Request(s)	Records relating to requests by public for record copy	3 years
Petitions	Petitions submitted to Village for improvements or changes to existing Village services/structures	7 years
Annual Reports	Annual reports produced by a department, committee, program	7 years
Monthly Reports	Monthly reports of departments or committees	3 years
Monthly & quarterly payroll reports	Includes quarterly report of federal income tax withheld, quarterly report, state's quarterly report of wages paid	5 years
Insurance Policies	Insurance policies for property, workmen's compensation, liability plus any other determined coverage needed from time to time	7 years

Insurance Claims	Accident reports and settled claims filed with Village	6 years
LICENSES OR PERMITS		
License Applications	Includes license applications for pets and other animals as applicable	3 years
Liquor & Beer Licenses	Includes license applications (approved & unapproved) Ref: Wis Stat 125.04(3)(i)	4 years
Permits	Building permits, burning permits, vendor permits	5 years
PROPERTY TITLES	Records documenting the title of land owned by the Village including abstract and certificate of title	Permanent
ELECTIONS		
Absentee applications for federal ballot	Includes copies of proof of identification when submitted with application	22 months
Absentee applications for all other elections	State, county, local elections applications with proof of identification	22 months
Campaign finance reports	Municipality elections > financial disclosure reports filed by candidate during election campaigns	6 years
Campaign registration statements	Municipality elections > Statements filed by candidates for public office includes notification of non-candidacy and candidacy for local election	6 years
All other election documents	All other election documents listed by State of Wisconsin /Government Accountability Board relevant to Village of Hewitt. https://elections.wi.gov/sites/default/files/publication/65/destruction_schedule_7_20_12_pdf_19742.pdf	See referenced pdf
FINANCE RECORDS		
Annual Budget	Records related to establishing the annual operating budget each fiscal year	6 years
Bank Statement	Monthly bank statements received from institutions holding municipal funds	7 years
Bank Reconciliation	Monthly bank statement reconciliation report for Village regular and tax collection fund	7 years
Bank Deposit Record	Bank deposit slip for funds deposited to Village regular and tax collection fund	7 years
Treasurer's Report	Monthly record accounting for receipts and disbursements for each calendar month	7 years
Credit Card Statement	Credit card statement and corresponding receipts	3 years
Final Tax Roll	Real and personal property rolls	7 years
Statement of Taxes	Combined record of calculations used to set final taxes (Village copy)	7 years

Tax Settlements	Used to verify tax collections compared to taxes levied in municipal records	7 years
Annual Financial Report	Annual financial report submitted to WISC Department of Revenue as required each fiscal year	Permanent
Bills of the Month	Monthly Bills of the Month Statement for the Village of Hewitt	Permanent
Vendor Invoices	Account payable invoices submitted by vendors, contractors, etc.	7 years
<i>PLANNING & ZONING</i>		
Annexation Records	Requests for annexation and subsequent decision	Permanent
Comprehensive Growth & Development Plan	Document that provides guidance for future growth and development of the village	Until superseded by new plan
Conditional Use Permits	Applications and related documents for a conditional use permit and related documents, i.e. public hearing notices, reports, public hearing documentation and decision.	7 years
Easements	Grants of easement	Permanent
Final Plat	A map showing the divisions of a piece of land.	Permanent
Preliminary Plats	Created during the development of subdivisions	Superseded by final plat
Zoning, Rezoning Files	May include but is not limited to maps, rezoning application, written local description of the proposed zoning boundaries and drawings of the boundaries. Also includes public hear records	Permanent
Zoning Variance Files	Records related to request for zoning variance including maps, application, written description and decision.	Permanent
Zoning Board and Board of Appeals	Agendas, minutes, reports, plans and other material submitted to Zoning Committee or Board of Appeals	Permanent
<i>ASSESSMENT</i>		
Assessor Final Report	Documents applicable to yearly changes to master property record and personal property.	5 years
All other Assessment Documents	All other assessment documents from Board of Revenue (BOR), assessor, including BOR minutes, written objections from taxpayer(s); public hearing notices for BOR	
<i>OTHER</i>		
Legal Documents	All documents considered to be legal documents	Permanent
Miscellaneous	Documents considered to be a part Village Board proceedings, not specifically listed or identified at this time	3 years or as determined

