



Date: August 8, 2023

Honorable Mayor and Council Members:

Author and title: Judy Price, Town Clerk

Title: **Adoption of the Town of Truckee's Records Management Program Manual and Records Retention Schedule**

Jen Callaway, Town Manager

Recommended Action: Adopt Resolution 2023-49 approving the Town of Truckee's Records Management Program Manual and updated Records Retention Schedule.

Discussion: The Town has maintained a records management program since 1998. A Records Management Program provides guidance for the creation, storage and disposition of records. The manual outlines how this is accomplished. The Program has evolved over the years and is now focused on electronic records rather than paper records. Town staff hired Kaizen InfoSource to assist the Town with updating the Records Management Program to better reflect the current electronic records.

Federal, State laws and regulations provide some guidance on the minimum requirements for how long records need to be maintained and available to the public. The program looks at two factors: how long records are useful to staff and how much time it would take to re-create records. Both factors are considered when determining an appropriate amount of time for the Town to maintain a particular record and in what form it will be kept. The Town has a subscription with Diane Gladwell to update the retention schedules annually to reflect changes in State and Federal laws and regulations. The new retention schedule moves items back into the Assistant to the Town Manager, under the Town Manager's retention schedule. Staff would like Council to approve the retention schedule for the Town. Following this adoption, the Town Clerk and Town Attorney will approve necessary modifications to the retention schedule.

The Town's Records Management Program has significantly changed because the majority of the Town's departments no longer file in paper form, so references to the Municipal Functional Filing System (MUFFS) have been removed from the Program.

A great example of the need for a records retention schedule is found in the IRS rules. Individuals are required to maintain their tax documents for seven years for auditing purposes. If these documents are kept for over seven years, the IRS can audit every year for which those records are kept. It becomes a waste of space and a potential risk if records are maintained beyond their required retention.

Based on State and Federal laws, the Records Management Program will allow for the systematic maintenance and destruction of records. Without an adopted program, Town is not permitted to destroy its original records. The Town has a limited amount of space to store records and has not had to pay for offsite storage for our paper records. The Clerk's department has assisted the Town departments with responding to public records requests, applying the retention schedule to records, creating destruction notices, and facilitating the destruction of records to maintain the minimum amount of box storage for

the Town. The Clerk's department responds to an average of five public records requests per working day, with the highest number of these coming in the spring and summer.

Council's responsibility in the Records Management program is to adopt the program with the retention schedule, provide the resources to comply with the policies and procedures, and to understand what records they may have that are a matter of the public record.

Priority:

<input type="checkbox"/>	Enhanced Communication	<input type="checkbox"/>	Climate and Greenhouse Gas Reduction	<input type="checkbox"/>	Housing
<input type="checkbox"/>	Infrastructure Investment	<input type="checkbox"/>	Emergency and Wildfire Preparedness	<input checked="" type="checkbox"/>	Core Service

Fiscal Impact:

Public Communication: This staff report.

Attachments:

Attachment 1 – Resolution 2023-49
Attachment 2 – Records Management Manual
Attachment 3 – Records Retention Schedule