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## **CITY OF OTTERTAIL 2021 Records Management**

### **1. PURPOSE**

The purpose of a records management policy is to provide guidelines on the method for identifying, labeling, inventory of, storage of, and destruction process for city records and documents. As the City has made great efforts to be more environmentally conscious and with the advancement in data storage, all records/documents shall be scanned or recorded electronically. All records/documents that are unable to be scanned or recorded electronically will be stored in the vault at City Hall until capacity is full at which time off-site storage will be considered.

### **2. IDENTIFYING**

All employees are required to use the State of Minnesota's General Records Retention Schedule for Cities <https://www.mnhs.org/preserve/records/recser.php> in order to determine the retention periods for the records and documents created and utilized in their department. A complete list for general records is available at [https://www.mcfoa.org/vertical/sites/%7B067FFB58-E3CD-42BA-9FB1-11EFC7933168%7D/uploads/2018\\_General\\_Records\\_Retention\\_Schedule.pdf](https://www.mcfoa.org/vertical/sites/%7B067FFB58-E3CD-42BA-9FB1-11EFC7933168%7D/uploads/2018_General_Records_Retention_Schedule.pdf)

The City's Record Management Official shall be the City Clerk or designee.

### **3. LABELING**

All records/documents ready for storage must be placed in a neat and orderly manner in a banker's box. Each box must be individually labeled and must include the following information:

- a. Year of Contents of Box.
- b. Beginning and ending dates by month and day of Records/Documents stored within.
- c. Department from which records/documents originate.
- d. Destruction Date by month and year.

After destruction date is determined, a completed spreadsheet which indicates the records/documents to be destroyed and all permanent records transferred to the boxes identifying the series and code.

### **4. INVENTORY**

The City's Record Management Official or designee is responsible for retaining a copy of spreadsheet which indicates the record series and code to be retained or destroyed.

### **5. STORAGE**

An effort should be made to store all properly labeled and approved records/documents by department in the above noted storage area. All record/documents are to be stored with the front identifying label facing outward. When possible, city staff shall store all records/documents electronically. Presently, PDF forms on City's main computer shall be the City's storage medium.

**6. DESTRUCTION**

Annually, the City’s Records Management Official shall inspect the storage area and oversee the removal of records/documents, which have surpassed their destruction date. The City’s Records Management Official is responsible for maintaining a record of all records/documents that have been destroyed. It is no longer necessary to notify the State of Minnesota regarding destroyed records.

If there is no retention required for a specific document, then there is no need to create a record of its destruction.

The City’s Records Management Official is responsible for updating the inventory of records/documents currently in storage by removing destroyed records/documents in the most economical and practical form.

**7. EFFECTIVE DATE OF AMENDED POLICY:**

This amended policy shall be effective upon approval by the Ottertail City Council this 19th day of August, 2021.

s/s \_\_\_\_\_  
Ron Grobeck, Mayor

Attest:

s/s \_\_\_\_\_  
Elaine Hanson, Clerk-Administrator

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