



Record Retention and Destruction

Administrative Regulation | Records & Data Management | #15.02

Effective Date: October 16, 2017
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Note: Terms that are ***bolded and italicized*** the first time they appear in this regulation are defined below. After the first occurrence, defined terms appear in *italics only*.

Purpose

The City follows the City General ***Records Retention Schedule***, as established in Oregon Administrative Rules (OAR) Chapter 166, Division 200. This regulation establishes policies and procedures for retention, management, and lawful destruction of ***public records***.

Scope

This regulation applies to all ***public records*** created, received, owned, used, or retained by the City, regardless of format or medium.

Policy

Each City department must retain all records, regardless of medium or physical or format, including email, in accordance with the City General ***Records Retention Schedule*** as prescribed in OAR Chapter 166, Division 200. Questions about retention of all ***public records*** shall be directed to the City Recorder.

Each department will be responsible for the retention of the ***official copy*** created or received within that department, except for records centrally maintained by the City Recorder, including ordinances, resolutions, contracts and agreements.

Records not listed in the City General ***Records Retention Schedule*** are considered program-specific records and must be reviewed and approved by the State Archivist prior to destruction.

Each department director must designate a department or division records staff contact responsible for records management coordination within the department. Questions regarding records retention or destruction must be directed to the City Recorder.

Procedure

1. Official Copy Designation

A. Paper or Physical Records

- a. The ***official copy*** of a paper or physical record must be clearly stamped or otherwise marked

as “*Official Copy*.”

- b. Only employees authorized by the department director may designate and stamp official copies.

B. Electronic Records

- a. Records created or stored electronically are considered the *official copy* if they comply with the [*Digital Imaging as Official Copy*](#) administrative regulation.
- b. Departments must ensure **electronic records** remain accessible, readable, and secure for the full retention period.

2. Transfer to Storage

A. Eligibility for Transfer

- a. Records that have not met their minimum retention period but are no longer actively used may be transferred from active storage to inactive or permanent storage

B. Storage Preparation Requirements

- a. The following steps must be followed when transferring paper or physical records to storage:
 - (1) Records will be stored in numbered file cabinets or one cubic foot box. Alternative storage methods must be approved by the Recorder.
 - (2) Only one record series per box, except if series is small, mix series by retention.
 - (3) Records should be grouped and boxed by fiscal or calendar, depending on how they are used. Manila file folders or dividers are recommended, rather than hanging folders which break down the sides of the boxes.
 - (4) A completed archive label must be affixed outside of the box and include:
 - (i) Department
 - (ii) Record contents
 - (iii) Retention schedule reference
 - (iv) Scheduled destroy date
 - (5) The department or division records staff contact must maintain and regularly update an inventory of stored records.
 - (6) Deliver the boxes to their appropriate storage area as determined by the department.
 - (7) Records added to the storage inventory should be assigned a box location number.

3. Record Destruction

A. **General Destruction Standards**

- a. Records should be destroyed once they meet minimum retention period, unless they are deemed to have continued administrative, legal, or historical value.
 - (1) In those cases, approval to retain the record must be obtained from the:
 - (i) Department Director
 - (ii) City Manager
 - (iii) City Attorney
 - (iv) City Recorder
 - (2) Once a record has served its purpose and has met the minimum retention, it is ready for final **disposition** using the following process:

4. Destruction Methods by Record Type

A. **Paper or physical records**

- a. The employee in possession of the records will fill out a Records Destruction Request form which will be submitted for review and approval by the:
 - (1) Department/Division Records Staff Contact;
 - (2) Department Director; and
 - (3) City Recorder.
- b. Once the request has been approved by the City Recorder, the form will be returned to the employee to proceed with destruction by the appropriate method.
- c. Records containing confidential information (e.g., Social Security numbers) must be shredded using a crosscut shredder or secure disposal method.
- d. Employees destroying records will note which method the records were destroyed and sign and date the form.
- e. The completed form will be submitted to the City Recorder for filing.

B. **Electronic records**

- a. A report will be generated annually listing all electronic documents that have reached their retention, as noted in the end date field.
- b. The report will be reviewed by the Department Records Staff Contact
- c. Once the report and retention eligibility are verified by the Department Records Staff Contact, it will be provided to the City Recorder for review and authorization for destruction.
- d. The Department/Division Records Staff Contact will work with the IT Department to determine the appropriate method to delete the records from the applicable program.

e. The completed report will be submitted to the City Recorder for filing.

C. E-mail records

- a. E-mail messages must be reviewed prior to deleting.
- b. Records relating to specific programs within the City must be retained in accordance with the City Retention Schedule.
- c. The employee in possession of the email records which have reached their retention will fill out a Records Destruction Request form which will be submitted for review and approval by the Department Records Staff Contact, Department Director, and City Recorder.
- d. Once the request has been approved by the City Recorder, the Department Records Staff Contact will work with the IT Department to appropriately delete the records from the email account.
- e. The completed report will be submitted to the City Recorder for filing.

D. Text messages

- a. Employees must not use text messaging in creating *public records*.
- b. If a *public record* is inadvertently created via text, the employee must immediately forward the message to their City email account to ensure proper retention.
- c. The City does not retain text messages and will not search them in response to *public records* requests.

Definitions

Term:	Definition
<i>Disposition:</i>	The destruction of public records that have met their retention by recycling, shredding, pulping, incineration, or electronic deletion/destruction.
<i>Electronic Record:</i>	Any record that is created, maintained or scanned into an electronic format.
<i>Official Copy:</i>	As defined in OAR 166-005-0010(7) is the version of a public record that has been designated by the agency as the record of a transaction or event, and which is subject to the requirements of laws, rules and the records retention schedule authorized by the State Archivist.

Public Record:

As defined in ORS 192.005 is any information that:

- Is prepared, owned, used or retained by the City;
- Relates to an activity, transaction or function of City of Springfield;
and
- Is necessary to satisfy the fiscal, legal, administrative or historical policies, requirements or needs of City of Springfield.

The following provisions apply to the definition of Public Record:

- Public records may exist in any format, including paper form or in electronic form (including e-mail).
- Extra copies of a record, preserved only for convenience of reference, are not public records.
- Messages on voicemail or on other telephone messages storage and retrieval systems are not public records.
- Text messages and instant messages may constitute public records.

Records Retention Schedule:

As defined in OAR 166-200-0410) is a document produced and approved by the State Archivist listing the length of time a record needs to be kept for administrative, legal, fiscal or historic purposes.

Related Resources

Standard Operating Procedures (SOPs):

- [Record Destruction](#)

Administrative Regulations:

- [Digital Imaging as Official Copy](#)

Forms:

- [Records Destruction Request Form](#)

Municipal Code & State Statute:

- [Springfield Municipal Code section 2.305](#)
- [ORS 192.005, Public Records](#)
- [OAR 166-005-0010\(7\), Official Copy](#)
- [OAR 166-200-0410, City General Records Retention Schedule](#)