

**City of Burlington
Records Retention Policy**

Record Series Title	Records and comments	Retention Period and State Retention Schedule Number
Ordinances, Orders, Resolutions- Departmental Copies	Ordinances, Orders, and Resolutions approved by City Council. Keep all reports, written opinions, and other information integral to the development of the ordinance.	Retained by Clerk/Treasurer until superseded, plus 3 years then conditional archival. Confirm with Clerk/Treasurer before archiving. GRS-1000.1102.73
Public Planning	Pamphlets, reports, studies, proposals, and similar materials created in support of public programs and initiatives.	Retain until superseded, plus 3 years. GRS-1000.1062.69
Minutes	Records of what was said and done at meetings by a public body and/or for minutes documenting policy developments. Includes significant supporting materials.	Retain until calendar year ends, plus 3 years, then archive. GRS-1000.1102.59
Agreements and Contracts	Contracts, and agreements, including reports, correspondence, and similar records related to their negotiation, administration, renewal or termination. Use for signed original contract and all amendments.	Keep official record copy of all contracts for 6 years after end of agreement or contract period then destroy pursuant to 12 VSA §511. Confirm disposition with Clerk/Treasurer's Office and City Attorney before destroying. GRS-1000.1126.26
Real estate contracts and original leases	Materials related to real estate transactions, such as MOU's.	Retain until the life of the asset ends (i.e. as sale of property) plus 6 years. Confirm disposition with Clerk/Treasurer's Office before destroying. Archive if it has historical value. GRS-1254.1114.27

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Correspondence -Substantive	Use for any correspondence transmitted or received that has significant administrative value and/or documents policy development. Includes opinions and memoranda of decisions. Includes significant supporting materials.	Retain until Completed/Closed, plus 3 years, then Archive. GRS-1000.1102.53
Routine Correspondence and Internal Memoranda- Transitory	Records of temporary usefulness that are not an integral part of a records series of the office, that are not regularly filed within a recordkeeping system, and that are required only for a limited time for the completion of an action by an official or an employee of the City. Some examples of transitory information: routine messages, and internal meeting notices.	Retain until the purpose of the record has been fulfilled. GRS-1000.1000.28
Case Files	Including all cases related to employment to which the City was a party, criminal litigation originating from this office, records of quasi-judicial proceedings, insurance claims for damages or reimbursement, or any other matters which this office represented the City.	Retain until completed/closed, plus 6 years then confirm archival value with City Attorney. Destroy files not archived. 12 V.S.A. §511
Public Records Request	All records requests, including correspondence and other documentation related to the request and routine responses to City staff about what types of records are releasable. Including requests received via e-mail.	If no administrative action and request is wholly filled, destroy one year after fulfilling request. GRS-1000.1000.139.
Calendars	Use for schedules of meetings and related events.	Retained until calendar year ends plus 1 year then destroy. GRS-1000.1103.19
Drafts	Use for preliminary or tentative versions of a document. Drafts that are acted upon or put into practice must be retained according to their intended record type (i.e. policies).	Retain until obsolete then destroy GRS-1000.1000.37

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Notes	Use for brief statements of a fact or experience, written down for review, or as an aid to memory, or to inform someone else. Includes short, informal notes such as phone messages.	Retain until obsolete then destroy. GRS-1000.1000.60
Audits	Use for final reports received at the conclusion of an audit conducted by an outside entity. Includes audits related to federal awards. Retain most recent audit report at all times and use this schedule for audit reports that have been superseded. For Management Letters received following an audit, retain permanently.	Retain until superseded, plus 3 years, then destroy. GRS-1000.1002.10
Invoices	Use for documents created by a vendor, grantee or another agency to initiate payment. Includes statements, inter-departmental transfers and other requests for payment.	Retain until Audit Complete then destroy. GRS-1000.1002.49
Purchase Orders	Use for authorizations to vendors to deliver goods and services, which upon acceptance constitute purchase contracts.	Retain until Audit Complete then destroy. GRS-1000.1002.75
Receipts	Use for documents that provide evidence of money received and deposited. Includes deposit tickets, bank receipts, and similar records.	Retain until Audit Complete then destroy. GRS-1000.1002.77
Worksheets	Use for worksheets, spreadsheets, and similar records used to track daily accounting information or make preliminary calculations related to the financial activities of the agency.	Retain until Audit Complete then destroy. GRS-1000.1002.104
Budgets	Use for the official estimated or intended expenditures of a unit of government for a given period along with proposals for financing those expenditures. Also use for formal adjustments to budgets during the budget cycle. For budgets that have significant administrative value, retain permanently and use the retention requirements for Reports in GRS-1000.1102	Retain until Fiscal Year Ends, plus 3 years, then destroy. GRS-1000.1012.17
Reports	Use for annual reports and similar reports, usually required by State or Federal law, documenting activities and accomplishments. Includes significant supporting materials.	Retain until Calendar Year Ends, plus 3 years, then archive. GRS-1000.1102.144
Press Releases	Use for official agency statements distributed to the press that relate to the agency's administration and/or the formulation of development of policy.	Retain until Calendar Year Ends, plus 1 year, then destroy. GRS-1000.1102.72

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Policies	Use for written statements that outline agency or program guiding principles or general courses of action. Includes significant supporting materials.	Retain until Superseded, plus 3 years, then confirm before destruction. GRS-1000.1102.70
Plans (reports)	Use for strategic plans and similar planning documents, usually required by State or Federal law, documenting agency or program goals, objectives and plans for the future. Includes significant supporting materials.	Retain until Superseded, plus 3 years, then archive. GRS-1000.1102.69
Studies	Use for studies conducted by or for a public agency or program that relate to the agency's administration and/or the formulation or development of policy. Includes significant supporting materials.	Retain until Completed/Closed, plus 3 years, then Archive. GRS-1000.1102.116
Decisions	Use for written decisions of violation or noncompliance, including final orders and notices of violation, issued by the enforcement agency. Includes decisions to dismiss a complaint. For directions or commands delivered during the course of an enforcement action that do not serve as decisions of violation or noncompliance, use "Orders."	Retain until completed/closed, plus 6 years, then confirm obsolescence before destruction. GRS-1000.1033.133
Tax Appeal Decisions	Use for written conclusions reached and orders given after an evaluation of facts and law.	Retain until Completed/Closed, plus 3 years then destroy. GRS-1570.1108.133
Tax Appeal Agreements	Use for written arrangements between parties including agreements to establish an extension of time for action or a settlement of claims.	Retain until Expired, plus 3 years, then destroy. GRS-1570.1108.5
Tax Appeal Petitions	Use for formal written applications made to an administrative body requesting a review of a tax assessment, denial or reduction of a refund or claim, requirement of a bond, determination of ineligibility for use value appraisal, or determination of payment in lieu of taxes value.	Retain until Completed/Closed, plus 3 years, then destroy. GRS-1570.1108.67
Appraisals	Use for written statements of valuation or estimates of market or other value. Includes significant supporting materials, as well as property valuation appeals and reappraisals.	Retain until Superseded, plus 3 years, then destroy. GRS-1570-1170.9

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Inventories	Use for legal tax inventories, including municipal grand lists, prepared by or filed with an assessing official. Does not include certified copies of grand lists filed and lodged with town clerks.	Retain until Superseded, plus 2 years, then destroy. GRS-1570.1170.48
Registers	Use for registers, databases, recording books, and similar systems that provide for the systematic and regular recording of activities related to the assessment of taxes.	Retain until Superseded then confirm archival value with Clerk/Treasurer's Office before archiving or destroying. GRS-1570.1170.81