


<p><b>TOWN OF SANDGATE</b> Sandgate, VT 05250</p> 	<p><b>TITLE:</b></p> <p style="text-align: center;"><b>MANAGEMENT OF SELECTBOARD RECORDS</b></p>	<p><b>Document Type:</b> Policy</p> <p><b>Document Number/ Revision:</b> 115.01</p> <p><b>Original Issue:</b> 01/21/2013</p> <p><b>Reissue:</b></p>
---	--	---

- I PURPOSE:** The purpose of this policy is to create a process for retention and disposition of public records in a manner consistent with Vermont State Archives and Record Administration ([www.vermont-archives.org/records/schedules](http://www.vermont-archives.org/records/schedules)).
- II SCOPE:** This policy shall apply to all records pertaining to the pursuit of business by the Selectboard in the Municipality of Sandgate except where conditions of state or federal requirements mandate otherwise.
- III EXEMPTIONS:** Title 1, Chapter 5, Subchapter 3 of Vermont Statutes provide for free and open examination of records. All people, however, have a right to privacy in their personal and economic pursuits; therefore, some records may be exempt from public inspection and copying for this reason.
- IV RETENTION:** The retention schedules and disposition requirements listed herein apply regardless of their media, format, or mode of transmission. Duplicate records that are used for specific legal, fiscal or administrative purposes may be either retained for reference or informational purposes or discarded when no longer needed, unless otherwise directed through an internal policy. Duplicates or copies of records shall not be retained longer than the original records.
- V ADMINISTRATIVE RECORDS:**
- 1. Agendas:** Retain in Selectboard File Cabinet (SBC) until Town Meeting plus 1 year then destroy. Minutes must accurately reflect the Agenda otherwise agendas should follow the retention for minutes.
  - 2. Agreements:** Retain in SBC. Use for formal agreements, such as with other towns or BCRC. Include significant supporting materials.
  - 3. Correspondence (Routine):** Retain in SBC until obsolete then destroy.
  - 4. Correspondence (Substantive):** Retain in SBC. Use for any correspondence transmitted or received that has significant administrative value. Include significant supporting materials.
  - 5. Drafts:** Retain in SBC until obsolete then destroy. Use for preliminary or tentative versions of documents that were never put into practice.

- 6. **Minutes:** Archive approved minutes in the vault (Town Clerk).
- 7. **Notices (Legal):** Retain in SBC until completed/closed plus 1 year then destroy. Use for official, written statements or notices that are required by law.
- 8. **Policies, Ordinances, Bylaws, Regulations:** Retain in SBC. Include current and superseded copies.

**VI GRANT RECORDS:**

- 1. **Agreements:** Retain in SBC until expired plus 3 years then destroy. Use for official signed grant agreements and related documents, including amendments.
- 2. **Applications:** Retain in SBC until completed/closed plus 3 years then destroy. Use for grant applications and related documents received in request of financial support.
- 3. **Audits:** Retain in SBC until completed/closed plus 3 years then destroy. Use for audit reports submitted by grantees.
- 4. **Correspondence (Routine):** Retain in SBC until obsolete then destroy.
- 5. **Correspondence (Substantive):** Retain until completed/closed plus 3 years then destroy. Use for correspondence that has significant administrative value and/or supports decisions related to an award.
- 6. **Decisions:** Retain in SBC until expired plus 3 years then destroy. Use for all grant award decisions.
- 7. **Invoices:** Retain in SBC until completed/closed plus 3 years then destroy. Use for original invoices from grantees.
- 8. **Reports:** Retain in SBC until completed/closed plus 3 years then destroy. Use for reports required by a grant agreement, including financial and monitoring reports.
- 9. **Worksheets:** Retain in SBC until completed/closed plus 3 years then destroy. Use for worksheets and checklists related to the award or administration of a grant.

**VII PERSONNEL FILES:**

- 1. **Applications:** Retain until obsolete then destroy.
- 2. **Reports:** Retain in Personnel File (vault) until obsolete plus 6 years and then destroy.

**Revision History:**

Doc. Number	Date	Actions
115.01	01/21/2013	Issued and approved by the Selectboard