

City of Grand Junction Records Retention Schedule

Communications & Engagement

Schedule No. 040 General Administrative Records

General Description: This schedule addresses common records that are found across the organization, such as correspondence, agreements and contracts or project records.

No record may be destroyed under this Retention Schedule if it is pertinent to any current, pending or anticipated investigation, audit or legal proceeding. The minimum retention periods specified in this schedule apply to the information contained within the record copy, regardless of the physical format of the record copy (paper, microfilm, electronic). Each municipality must decide on the physical format for each type of record, ensuring authenticity, readability and accessibility for the entire retention period. Duplicate Copies: Retain duplicated copies until no longer needed but not longer than the record copy.

Schedule ID	Record Series Title	Record Series Text	Retention Period
040.040	Awards and Honors	Awards and honors received from various public or private sources.	Retention: Until no longer useful
040.100	Correspondence and General Documentation	Correspondence is a written communication that is sent or received via the U.S. mail, private courier, facsimile transmission or electronic mail, including letters, postcards, memoranda, notes, telecommunications and any other form of written communications. The term general documentation is intended to cover a wide variety of records created in the normal course of business.	
040.100.A	Enduring Long-Term Value	Documentation or correspondence, including e-mail messages, with lasting long-term administrative, policy, legal, fiscal, historical or research value; records that relate to policy issues and actions or activities in which an important precedent is set; records of historic events; and other similar records and documentation.	Retention: Permanent
040.100.B	Routine Value	Routine operating documentation or correspondence with limited administrative, legal, fiscal, historical, informational or statistical value. Includes routine e-mail messages, letters or memoranda, reading or chronological files that contain duplicates of memos or letters also filed elsewhere, routine requests for information, transmittal documents, etc.	Retention: 2 years
040.100.C	Transitory Value	General documentation or correspondence of extremely short-term value, including advertisements, drafts and worksheets, desk notes, copies of materials circulated for informational "read only" purposes, other records, including e-mail messages, with preliminary or short-term informational value.	Retention: Until material has been read

City of Grand Junction Records Retention Schedule

Communications & Engagement

Schedule ID	Record Series Title	Record Series Text	Retention Period
040.110	Event Records	Records pertaining to promotion and organization of special and historic community events or celebrations in which the municipality has a role, such as festivals, fairs, rodeos, 4th of July celebrations, pioneer days, holiday display lighting, etc.	Retention: 2 years after event concludes
040.120	External Groups and Agencies	Records such as meeting agendas and minutes, studies and reports and other material provided for courtesy or informational purposes from associations, organizations, groups and agencies that are not part of the municipal organization but which have some form of association or relationship with the municipality.	Retention: Until no longer needed
040.130	Forms – Blank	Blank forms are not considered to be records and should be separated from the records. However, a master forms file may be maintained to track the evolution of the form and instructions regarding use of the form.	Retention: Until superseded, except retain 1 copy permanently if master forms file is maintained
040.140	Housekeeping Files	Records of a general housekeeping nature that do not relate directly to the primary program responsibility of the office. Includes records such as charity fund drives, office parties, copies of custodial service requests, parking space assignments, telephone and fax logs, etc.	Retention: Until no longer needed for reference
040.150	Intellectual Property Records	Records relating to copyrights, trademarks, service marks, seals, logos, taglines and other similar intellectual property.	Retention: Permanent
040.170	Mailing and Distribution Records		
040.170.A	Envelopes	Envelopes that contained communications.	Retention: Dispose of immediately, unless needed as documentation of mailing and receipt dates
040.170.B	Mailing Record	Documentation of mailing dates, content of mailings, mailing and distribution lists for specific mailings; certified or registered mail return receipts; etc.	Retention: 2 years
040.170.C	Meeting Notification Lists	Listings of persons who, within the previous 2 years, have requested advance notification of all meetings or meetings with specific content. [CRS 24-6-402(7)]	Retention: Until updated
040.170.D	Undeliverable Mailings	Mailings (excluding mailed ballots) returned as undeliverable.	Retention: 1 year after matter referenced in mailing is concluded

City of Grand Junction Records Retention Schedule

Communications & Engagement

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040.220	Policies and Procedures Documentation	Written directives, instructions, rules and guidelines documenting policies and procedures, including departmental or organization-wide directives or orders, policy or operations manuals, instruction manuals, handbooks and memoranda setting out responsibilities and guidelines or outlining policies and procedures.	
040.220.A	Clerical or Other Routine Manuals		Retention: 2 years after superseded or obsolete
040.220.B	Policies and Procedures and Supporting Documentation - Enduring Value	Documentation, including written materials such as personnel policy manuals and standard operating procedures, that have long-term value in determining current and past policies or procedures in liability cases, personnel disputes and other circumstances; includes supporting documentation relating to the development, formulation, establishment, rationale, approval and implementation of such policies and procedures.	Retention: Permanent
040.250	Public Relations Records		
040.250.A	Lobbying Records	Records of official positions and lobbying efforts with regard to state or federal legislation or ballot measures, lobbyist registrations, municipality"s written reviews, analyses or positions regarding legislation or regulations, etc.	Retention: 4 years, except that resolutions adopting legislative positions are permanent
040.250.B	News Releases		
040.250.B.1	Releases – Policy or Historical Value	Prepared statements or announcements issued to the news media announcing events, new programs, program changes or termination, major shifts in policy and changes in officials or senior administrative personnel.	Retention: Permanent
040.250.B.2	Releases – Routine	Prepared statements or announcements of routine events, activities, etc.	Retention: 3 years
040.250.C	Speeches and Public Comments	Recorded speeches, addresses, and comments of public officials representing the municipality at public venues, such as state of the city addresses. Includes only those with significant historical value, in any format, including paper, videotape, motion picture or tape recordings.	Retention: Permanent
040.260	Publications	Material that has long-term historical or research value produced for wide internal or external distribution, including annual reports, brochures, pamphlets, leaflets, newsletters, instructional materials and similar materials.	Retention: Permanent

City of Grand Junction Records Retention Schedule

Communications & Engagement

Schedule ID	Record Series Title	Record Series Text	Retention Period
040.26X	Publications - Routine Value	Material that does not have long-term historical or research value produced for wide internal or external distribution, including annual reports, brochures, pamphlets, leaflets, newsletters, instructional materials and similar materials.	Destroy after date no longer needed / useful/ relevant
040.280	Reference Files	Non-record copies of articles, periodicals, reports, studies, vendor catalogs and similar materials that are needed for reference and information but are not considered part of the office"s records.	Retention: Until no longer needed for reference
040.290	Reports	Written reports regarding operations or activities.	
040.290.A	Annual Reports	Summary annual reports on primary activities and accomplishments for the previous year; may include statistics, narrative reports, graphs and diagrams.	Retention: Permanent
040.290.B	Daily Reports	Reports documenting daily activities.	Retention: 2 years
040.290.C	Monthly Reports	Reports on activities and accomplishments for the previous month.	Retention: 2 years
040.290.D	Quarterly Reports	Reports on activities and accomplishments for the previous three months.	Retention: 3 years
040.290.E	Weekly Reports	Reports on activities and accomplishments for the previous week.	Retention: 2 years
040.330	Studies, Plans and Reports - Enduring Value	Documents providing detailed examinations of specific topics of interest to the municipality. Examples include feasibility studies, planning and land use studies, basin plans, capital projects reports, transportation system plans, master street plans and similar documents that have long-term reference or historical value. Studies, plans and reports prepared by or on behalf of other entities, and which include information of interest to the municipality, should be evaluated for long-term reference or historical value.	Retention: Permanent
040.33X	Studies, Plans and Reports - Routine Value	Documents providing detailed examinations of specific topics of interest to the municipality but which provoke only routine interest and have only routine value.	Until no longer needed/ useful/ relevant
040.340	Surveys Conducted by Municipalities	Broad surveys, conducted by the municipality or a contractor on behalf of the municipality, that have enduring value and community-wide scope and significance, such as (but not limited to) community opinion surveys regarding municipal services or long-range planning initiatives.	
040.340.A	Compilations		Retention: Permanent

City of Grand Junction Records Retention Schedule

Communications & Engagement

Schedule ID	Record Series Title	Record Series Text	Retention Period
040.340.B	Survey Responses		Retention: 2 years after compilation is complete
040.340.C	Routine		Retention: Until no longer needed.
040.350	Worksheets, Drafts and Other Preliminary Working Material	Documents such as rough notes, calculations or drafts assembled or created and used to prepare or analyze other documents; records of a preliminary or working nature which do not represent significant steps in the preparation of the final version of documents; draft or working material relating to a matter that is never completed; includes informal notes, preliminary drafts of letters, memoranda, reports, computer or printer output used to verify information entered into a computer and not considered to be a final copy, etc.	Retention: Until no longer needed