

WISCONSIN
HISTORICAL
SOCIETY

Public Records Retention/Disposition

Municipal Treasurers Association of Wisconsin
Fall Conference

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Topics

- Overview of Public Records Responsibilities
- Retention and Disposition
- Role of WHS in the Disposition process
- Retention Schedules
- Revenue Specific Topics



Public Records Responsibilities

- **Wis. Stats. § 19.21** (public records responsibilities): **Wis. Stats. §§ 19.31-19.39** (open records laws)
- You are responsible for the records you create, those created by your predecessors, and records generated by contracted parties
- Records must be retained for a set retention period
- Records must be publically accessible during that assigned retention period



What is a Public Record?



- Anything created connection with the transaction of public business
- Non-records defined by Wis. Stats. 16.61(2)(b) and 19.31(2)
- Items that are not Public Records:
 - Duplicate copies
 - Unsolicited invitations or notices
 - Routing slips and envelopes
 - Drafts, notes, preliminary work (personal use materials)

Retention Requirements

- **Municipalities can set retention periods by creating records schedules**
- **Wis. Stat. § 19.21(4)(b) sets minimum retention at 7 years, unless...**
 - Retention is set by a different statute
 - A different time is approved by Public Records Board (PRB)
 - PRB has authority to set retentions less than 7 years

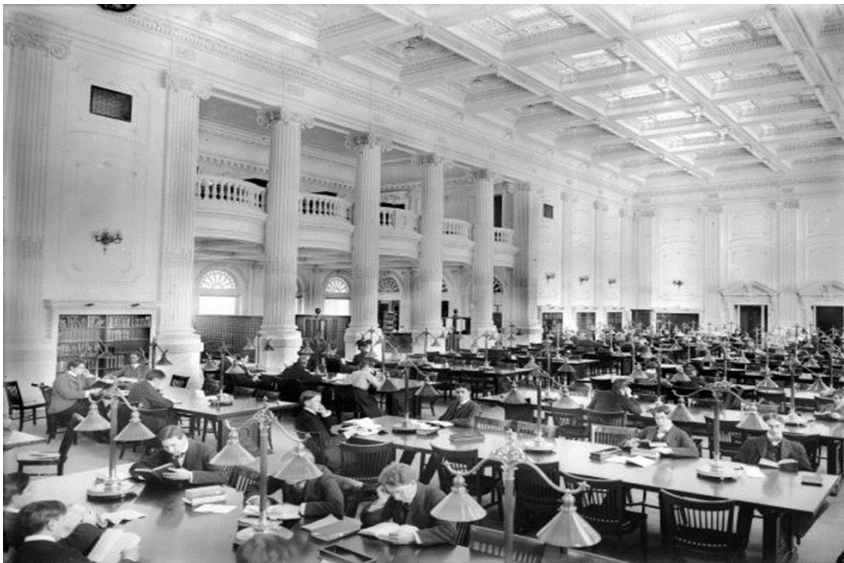


Disposition

- **Wis. Stat. 19.21(4)(a) requires 60-day notification be given to WHS before destroying ALL public records**
- **Records must be out of retention**
- **Approval from secretary of revenue is required before destroying assessment rolls with forest crop acreage**
 - Contact Local Government Services Bureau



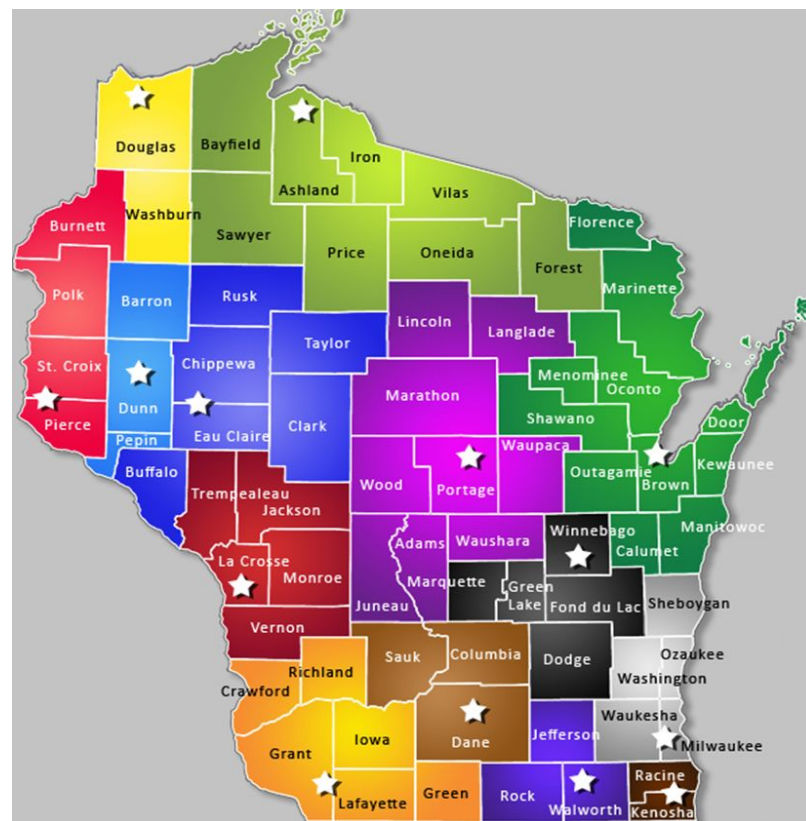
Notifying the Historical Society



- Written letters only: no email notifications
- Include titles of record series and year ranges being offered
- Reply will state if records are accepted, declined, or need to be reviewed
- Keep all records of notification

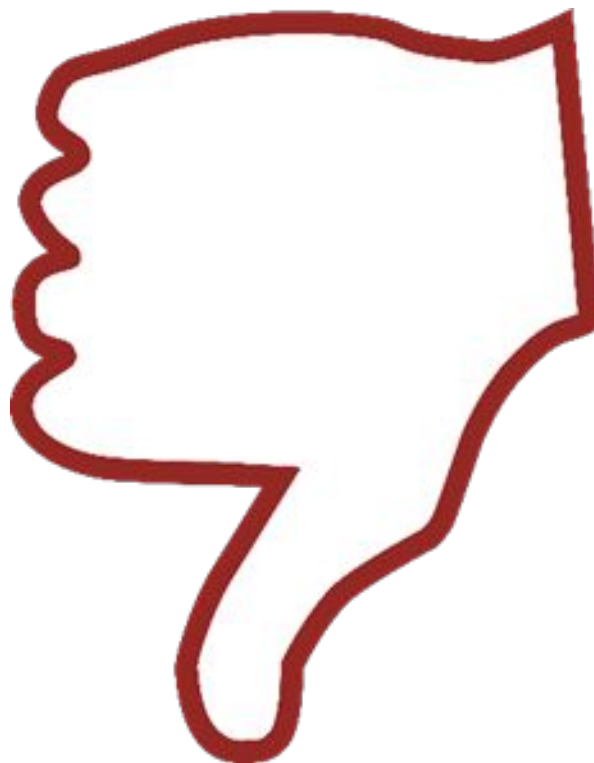
Responses to Notifications

- **Declined:** records may be disposed at your convenience
 - Make sure to destroy thoroughly
- **Review/Transfer:** WHS will schedule transfers (may take some time)
 - WHS assumes title and control for transferred records
 - Records arranged, cataloged, and housed at corresponding Area Research Center



Waived Records

- Records that have had the 60-day notification period waived do not need to be offered to WHS
- Notification waived either in the reply letter or indicated in General Records Schedules
- Alert WHS before destroying ANY records over 75 years old



General Records Schedule

 Administrative Records

 Budget Records

 Facilities Records

 Fiscal and Accounting Records

 Fleet and Aircraft Management Records

 Human Resources Records

 Information Technology Records

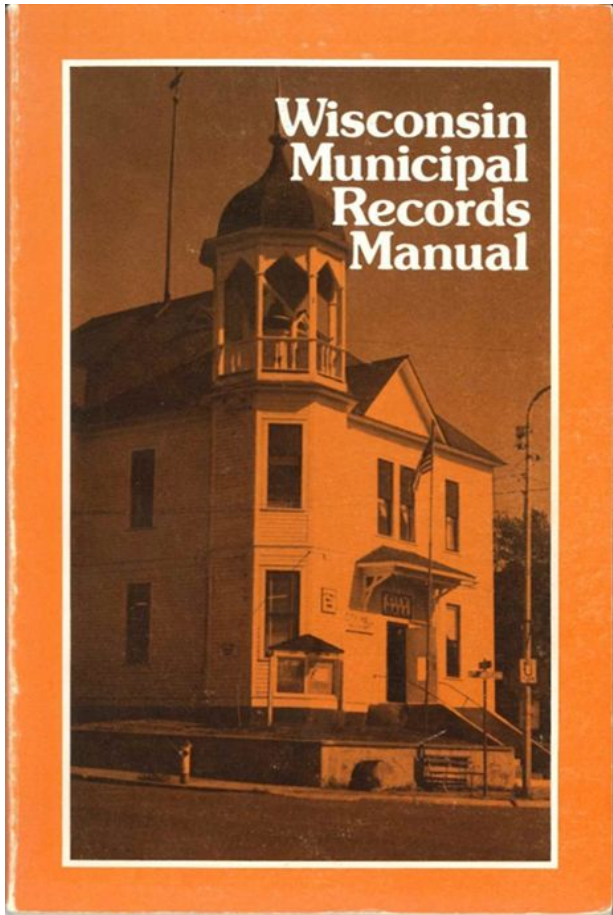
 Payroll Records

 Purchasing and Procurement Records

 Risk Management Records

- **Cover similar types of records created by all forms of government**
- **Specific schedules available for state agencies and local governments**
- **Pre-approved for use by PRB**
- **Gives descriptions of individual record series, retention times, and disposition instructions**

Municipal General Schedule



- May be adopted by any form of municipal government (Cities/Towns/Villages)
- Arranged into sections of similar types of record series (Ex. Administrative, Financial, Revenue...)
- Available on PRB website
- Public Records Board requires formal adoption to use general schedules
 - Fill out and submit PRB-002 form

Example

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Assessment				
Cadastral Maps	Includes any plats, assessor's plats, certified surveys, or aerial photographs used in determining taxable boundaries.	Permanent	No	N/A
Final Assessment Rolls	Both real and personal property rolls.	Creation+15 years (Provided no Forest Crop Acreage is recorded) ²⁴	No	Notify
Low Income Property Owner's Certification of Occupancy (PR-231)	Form used to determine property tax exemption as low-income housing, as defined by Wis. Stat. § 70.11(4a).	Event+5 years; Event=Form submitted to local assessor	No	Waived
Master Property Records	Details the appraisal of real property, based on the field inspections of the assessor. Use this schedule for any Master Property Record Cards (PA-500), Agricultural Work Cards (PA-703), or Residential Record Card Inserts.	Event+5 years; Event=Life of structure	No	Notify

²⁴ Wis. Stat. § 19.21(4)(a) states that no assessment roll that contains forest crop acreage may be destroyed without the prior approval of the secretary of revenue. Notification to the Wisconsin Historical Society is still required before approved assessment rolls can be destroyed.

Revenue Records

- **Four subsections within Revenue Section:**
 - Assessment
 - Board of Review
 - Special Assessment
 - Tax Calculation/Collection
- **General retention set at 7 years**
- **Most assessment/tax rolls have 15 year retention**



Revenue Records of Interest

- **WHS is generally interested in:**
 - Final Assessment/Tax rolls
 - Final approved Board of Review Minutes
 - Records over 75 years (review)
- **THIS IS NOT A COMPLETE LIST! Follow instructions in General Record Schedules and past notification letters from WHS!**



Need Help?

Contact your friendly local government records archivist at:

Andrew.baraniak@wisconsinhistory.org

(608) 264-6469

Visit the WHS Local Government Records Website:

<https://www.wisconsinhistory.org/Records/Article/CS15471>

Public Records Board Website:

<https://publicrecordsboard.wi.gov/Pages/home.aspx>

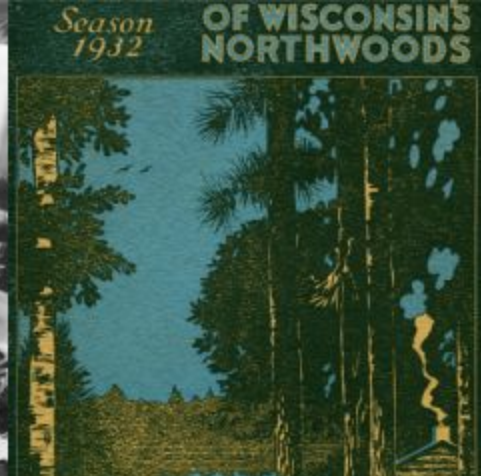
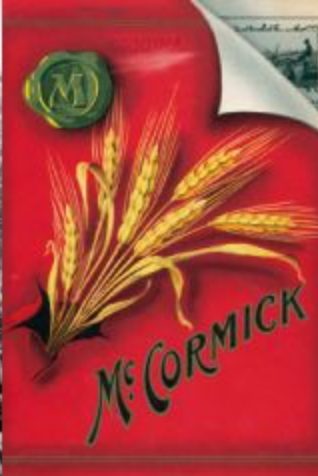
Local Government Services Bureau (Forest Crop Acreage):

lgs@wisconsin.gov

(608) 261-5360

Questions?





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THANK YOU

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