

CLERK'S OFFICE
APPROVED
Date: 10/14/2008

Submitted by: Chairman of the Assembly at
the Request of the Mayor
Prepared by: Information Technology
For reading: October 14, 2008

ANCHORAGE, ALASKA
AR NO. 2008-226

1 A RESOLUTION OF THE ANCHORAGE ASSEMBLY APPROVING THE
2 UPDATED RECORDS RETENTION SCHEDULE FOR THE PLANNING
3 DEPARTMENT, IN ACCORDANCE WITH MUNICIPAL POLICY AND
4 PROCEDURE 52-2
5

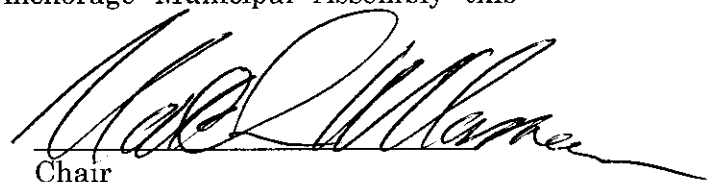
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7 WHEREAS, The Planning Department has updated its Records Retention
8 Schedule; and
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10 WHEREAS, in accordance with Municipal Policy and Procedure 52-2, the
11 Records Management Officer has reviewed the Records Retention Schedule and
12 forwarded it for review and approval to the Municipal Archivist, Clerk, Internal
13 Auditor and Controller; and
14

15 WHEREAS, the Municipal Archivist, Clerk, Internal Auditor and Controller
16 have reviewed and approved the Records Retention Schedule.
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18 NOW, therefore, the Anchorage Assembly adopts the Retention Schedule as
19 submitted, reviewed and approved.
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21 PASSED AND APPROVED by the Anchorage Municipal Assembly this
22 14th day of October, 2008.
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Chair

ATTEST:

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Municipal Clerk



MUNICIPALITY OF ANCHORAGE RECORDS RETENTION SCHEDULE

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Records Management Unit Only
Planning	All Divisions		7944		2	10/14/2008	Ret. Sched. Code
						Page 1 of 1	

Records Retention Schedule - Signature Page (Form 91-042)

Signature Page

Pursuant to the provisions of AO No. 83-56, the records listed on this schedule are to be included on the Municipality of Anchorage Master Retention Schedule and recommended for disposition as indicated.

In accordance with Municipal Policy and Procedure 52-2, we have reviewed this Retention Schedule and the Records Retention Schedule Update Log. We provide our signatures below as approval.

Title	Name	Signature	Date
Agency Head	Tom Nelson	<i>[Signature]</i>	8-7-08
Agency Records Coordinator	Linda Brooks	<i>[Signature]</i>	8-7-08
Records Management Officer	Fred Carpenter		
Archivist	Toby Allen		
Clerk	Barbara Gruenstein		
Controller	Teresa L. Peterson		
Internal Auditor	Peter W. Raiskums		
Assembly Approval Received	This Retention Schedule received Assembly approval on the date provided in this row. This date becomes the Effective Date of this schedule and should be entered above.		



MUNICIPALITY OF ANCHORAGE RECORDS RETENTION SCHEDULE

Form 91-042A

For Records Center Use Only

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Ret. Sched. Code
Planning	Zoning & Platting		7944	1531	2	10/14/08	Page 1 of 14
1	2	3	4	5	6	7	
Retention Schedule Item #	Record Series Title and Description of records Included in the series	ERec	Record Copy Dept.	Office (years)	Records Center (years)	Records Disposition	Vital Record
1	Resolutions (all resolutions passed by the Planning and Zoning Commission, Platting Board, Zoning Board of Examiners & Appeals, Urban Design Commission; all administrative resolutions approved by the Planning Director; and resolutions adopted by any other regulatory or quasi-judicial board created in the future by the Municipality to handle zoning, platting, or other Planning matters.)	2a	Planning	C + 19	P		X
2	Board & Commission Meeting Minutes and Cassette Tapes						X
3	Notice of Zoning Action		State of AK	see remarks			

These resolutions are legal records, similar to Assembly resolutions, that must be maintained in perpetuity as official city records. Planning has been storing resolutions on-site in fireproof cabinets, and staff has begun to scan and create PDF copies as backup copies saved on MOA's network. Per this retention schedule, Planning will start storing the resolutions on-site in the fireproof cabinets for a twenty-year period, thereafter transferring the official, signed "hard copy" resolutions to the Records Center since the new center is better protected against water and fire damage. At some point, the Municipality will hopefully have an electronic records center/archives wherein these resolutions will be permanently stored as electronic records.

The Planning Department has hard copy meeting minutes prepared for each board or commission meeting. However, the minutes are not verbatim. Only the cassette tapes are full verbatim records. Planning's Boards and Commissions hold most of their meetings in the Assembly Chambers, and the Granicus software system (inaugurated in 2008) should capture the full verbal record of each meeting. However, there are still issues to be worked out with Granicus and we need more assurance that electronic records generated via Granicus will be permanently preserved. Also, some board and commission meetings do occur occasionally at sites other than the Assembly Chambers, and Granicus will not record meetings held at alternative sites. Therefore, Planning will continue to permanently preserve hard copies of minutes for the time being and any cassette tapes for future meetings held at locations where Granicus is not available (knowing that cassette tapes may be too brittle for use after 15-20 years.)

The State of Alaska's Recorder Office officially records these notices on property plats. The Municipal Planning Department retains a copy in the appropriate case file (case files are retained for 50 years), but the official record is at the State.



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Form 91-042A

For Records Center Use Only

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Ret. Sched. Code
Planning	Zoning & Platting		7944	1531	2	10/14/08	2 of 14
1	2						
Retention Schedule Item #	Record Series Title and Description of records included in the series	2a	3	4	5	6	7
		Erec	Record Copy Dept.	Office (years)	Records Center (years)	Records Disposition Hist. Archive Destroy	Retention Period Source Citation, Other Justification Remarks
4	Zoning Case Files (Planning & Zoning Commission)		Planning	C + 9	40	X	Case files are used by Planning, especially when a land use action is pending for a land parcel that was the subject of a previous land use action. The earlier case files provide some history for understanding a new land use application/case. However, case files are bulky and impractical to preserve permanently. Also, the official legal records about what has happened to a particular property are the board and commission resolution files (which are held permanently) and not the case files. The Planning Dept. will keep case files on-site for 10 years with the files stored for an additional 40 years at the Records Center before being destroyed.
5	Platting Case Files (Platting Board)		Planning	C + 9	40	X	Same treatment as zoning case files - see notes above
6	Zoning Board of Examiners & Appeals Case Files		Planning	C + 9	40	X	Same treatment as zoning case files - see notes above
7	Urban Design Commission Case Files		Planning	C + 9	40	X	Same treatment as zoning case files - see notes above
8	Bonus Points Files		Planning	C + 9	40	X	Files show how bonus points were calculated for given properties (Bonus points refer to cases wherein a building is allowed to be built bigger than normally allowed due to bonus points received for providing extra amenities such as pedestrian amenities. The bonus point files contain the background and calculations that explain how bonus points were calculated in the past for a particular building.)
9	Invoices for Zoning & Platting Fees (a copy of every paid invoice is to be kept at the front counter in chronological order; unpaid invoices generated in error are to be signed off by the division manager as voided and kept in the chronological invoice files; a second copy of every paid invoice is to be filed in the appropriate case file (as applicable) as proof of payment for the zoning or platting fees due.)		Development Services & Planning	see remarks			Since moving from City Hall to the Planning & Development Center in Nov/Dec of 2002, Planning ceased to generate original cash receipts. Planning now only generates invoices which customers take to the cashier's cage in Development Services to pay. Cashier runs the invoice thru the cash register and it comes out stamped as paid with the original returned to the customer, the cashier keeping a copy of the invoice with the cash receipt generated, and the customer returning 2 copies of the paid invoice to Planning. Thus, Dev. Svcs. is the official custodian for Planning's cash receipts, but Planning staff keeps a chronological invoice file at the front counter for 5 years before destroying. A copy of the invoice (stamped as paid) is also placed in the case file as proof of payment, and case files are retained for 50 yrs.



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Form 91-042A

For Records Center Use Only

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Ret. Sched. Code
Planning	Zoning & Platting		7944	1531	2	10/14/08	3 of 4

1	2	3	4	5	6	7	8
Retention Schedule Item #	Record Series Title and Description of records included in the series	2a ERAC	Record Copy Dept.	Office (years)	Records Center (years)	Records Disposition: Destroy, Archive, Other	Vital Record
10	Zoning & Platting General Working Files		Planning C + 9			X	
11	Title 21 Code Books (each new version issued)		Planning P	P			
12	Municipal Legal Opinions about Planning Matters	Pat	Law P				

Retention Codes

(for use with 4 above.)

C = Current/Created Year

A = Audit Year

= Number of years

P = Permanent

T = Terminated

ACT = Active

SUP = Superseded

IND = Indefinite

Examples:

C+2 = Current Year + 2 years

C+A+1 = Current Year + Audit year + 1 year

5 = 5 years

Instructions, explanation and help. If you need more help, contact Records Management 343-4849

1 Retention Schedule Item # Use numerical identification only.

2 Record Series Title and Description of included records: Provide the Record Series Title. Provide a list and description of records that are included in this record series. Use all the space you need here to adequately list pertinent, descriptive information about the included records. Indicate those record types that are ELECTRONIC Records by placing (E Rec) after the record type.

2a Place an X in this column to indicate if the Record Series contains any ELECTRONIC Record types.

3 Record Copy Dept.: The "official copy" of a record is the record copy. Usually, the department which produces the record also holds the record copy. List the dept. that holds the record copy.

4 Retention Period: This is the length of time (years) that this record series is required to be kept until it reaches final disposition. List years in the office and years in the record center. The sum of office years and record center years equal the total retention period. For ELECTRONIC records, indicate the total retention period for the record under the Records Center column.

5 Records Disposition: Place 'X' in the column that describes the disposition for the records series. If final disposition is "Other", i.e., Digitization (scanning), Microfilm, Archival Review, or another process, check this box and provide detailed information about the disposition process in the remarks in column 7.

6 Vital Record: Vital records include agency critical operations information, essential business continuity information or any other record which justifies special protection and inclusion in the MOA Business Continuity Plan.

7 Retention Period Source Citation, Other Justification, Remarks: Cite the source authority for any mandated retention period or justify the retention period with a sound administrative, fiscal or legal need. Also provide any remarks that will avoid confusion in the handling and disposition of the record series or in the application of the retention period. Use all the space you need to provide information on any unusual circumstances about the record series.



MUNICIPALITY OF ANCHORAGE RECORDS RETENTION SCHEDULE

Form 91-042A

For Records Center/Use Only

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Ret. Sched. Code
Planning	Physical Planning		7944	1522	2	10/14/08	4 of 14
1	2	2a	3	4	5	6	7
Retention Schedule Item #	Record Series Title and Description of records included in the series	Elec	Record Copy Dept.	Office (years)	Records Center (years)	Records Disposition	Vital Record
						Hist. Archive	Other
13	Areawide Zoning Amendment Case Files		Planning	C + 9	20	X	X
14	Areawide Zoning Amendments - Official Mylar Zoning Maps	X	Planning	P			X
15	Geotechnical Advisory Commission Meeting Packets			C + 24	25	X	

The Assembly uses ordinances to adopt zoning amendments, so each zoning change is officially recorded in the Assembly's records maintained by the Clerk's Office. However, the Planning Department is the record copy department for the case file that provides more extensive background information for each zoning change. The areawide zoning amendment case file includes Planning staff's recommendations and the Planning and Zoning Commission's resolution and meeting minutes.

Whenever the Assembly approves a zoning amendment, the Municipality's digital GIS zoning files are updated and an official Mylar zoning map amendment is printed. The Municipal Clerk and the Planning Director sign the Mylar map certifying that the map accurately reflects the zoning change adopted by the Assembly. All current "official Mylar zoning maps" are kept at Planning's public counter. Whenever a map is amended, the new map covering the amended area is added to the official maps at the public counter and the old Mylar map is retired to Planning's flat map cabinets and stored on site in Planning's offices permanently. (Each zoning map change is also digitally stored by MOA's GIS staff as a TIF electronic file.)

The Municipality created the Geotechnical Advisory Commission in 1975. Some topics discussed by the commission, such as avalanche and seismic hazards, repeatedly recur. For that reason, Planning retains the meeting packet on site for 25 years because the packet contains all handouts and documents reviewed by the commission at its meetings. The packet is forwarded to the Records Center for another 25-year period before ultimately being transferred to Archives as historical records that are never destroyed.



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Form 91-042A

For Records Center Use Only

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Ret. Sched. Code	
Planning	Physical Planning		7944	1522	2	10/14/08	5 of 14	
1	2	Record Series Title and Description of records included in the series	2a	3	4	5	6	7
Retention Schedule Item #			Exec	Record Copy Dept.	Office (years)	Records Center (years)	Records Disposition	Retention Period Justification; Authorities; Remarks
16		Geotechnical Advisory Commission Resolutions and Meeting Minutes	X	Planning	P			Planning is responsible for permanently retaining meeting minutes and resolutions passed by the Geotechnical Advisory Commission in its offices. Also, as a backup system, Planning staff will scan and save the resolutions and meeting minutes generated by the commission since its 1975 creation as PDF files on MOA's network in the coming year (2009).
17		Geotechnical Advisory Commission Cassette Tapes of its meetings		Planning	C + 14		X	Planning keeps cassette tape recordings of commission meetings on site for 15 years before discarding the tapes.
18		Anchorage Comprehensive Plan and All Plans and Studies Adopted as Elements (The Anchorage Comprehensive Plan means the plan for the entire Municipality and consists of multiple parts including plans covering specific geographical areas (i.e., Anchorage Bowl, Girdwood, Eagle River-Chugiak, Turnagain Arm), plans covering areawide issues (i.e., the Anchorage Coastal Zone Management Plan, Areawide Library Facilities Plan, Areawide Trails Plan), and plans about specific issues (i.e., Chester Creek Greenbelt, Hillside Wastewater Management Plan, 1992 Air Quality Attainment Plan.)	Partial	Clerk & Planning	P	P	X	State law & MOA's Home Rule Charter require Anchorage to prepare a comprehensive plan and to periodically update it. The Planning & Zoning Commission (PZC) first reviews any comp. plan updates as well as plans & studies adopted as subsequent amendments (elements) to the plan, with PZC's actions recorded in resolutions. Next the Assembly conducts its reviews, adopting via ordinances updates or new elements. The Clerk keeps the ordinances, but Planning also permanently retains the PZC resolution, Assembly ordinance, and actual document (the plan or study adopted) for future reference. Planning will keep 2 record sets: one set located in Physical Planning's offices & the other at the Records Center for backup. The various plans & studies adopted as elements to the comprehensive plan will be filed using headers & sub-headers found in 21.05.030 of the AMC. (Note that the Re-write of Title 2, to be adopted in 2009, will change this citation; use new cite once adopted.) Also, many elements of the current comprehensive plan are available to the public online as PDFs on Planning's website.



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Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Ret. Sched. Code
Planning	Physical Planning		7944	1522	2	10/14/08	6 of 14
1	2	3	4	5	6	7	
Retention Schedule Item #	Record Series Title and Description of records Included in the series	2a ERec	3 Record Copy Dept.	4 Office (years)	5 Records Center (years)	6 Disposition Hst. Archive Other Vital Record	Retention Period Justification; Authorities; Remarks
19	Anchorage Comprehensive Plan & Elements: Staff Working Files/Data Sets and GIS Data Sets		Planning	C + 29	X		Since the Anchorage Comprehensive Plan and the studies & plans adopted as elements to it must be updated periodically, the underlying data sets for updates must be preserved for re-use to ensure accurate comparisons between previous & new versions of plan documents. Physical Planning staff will preserve their working files & data sets for 30 years, preferably saving both electronic and paper copies. Files are to be organized using the same file headings & sub-headings used for the formal plan documents (record series #18 above) so that future staff will be able to locate & understand the base data used for tables and graphs in previous plan documents. Also, during 2009, the Planning Director will work with the IT Director to ensure that steps are taken to preserve GIS data sets for 30 years that are used for plan updates, using an electronic filing system that allows future staff to easily locate files created by former staff. GIS data sets are used to analyze land use demographic changes over time and to create many of the maps that are found in plan documents.
20	Other Planning Studies (Not Adopted as Elements to the Anchorage Comprehensive Plan)		Planning	P	P		Most planning studies are prepared as elements of the Anchorage Comprehensive Plan, but occasionally studies are done for other purposes. Planning will retain a copy of each such study on site as a permanent record and transfer a second copy as backup to the Records Center.



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For Records Center Use Only

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Rel. Sched. Code				
Planning	Physical Planning		7944	1522	2	10/14/08	7 of 14				
1	2	Record Series Title and Description of records included in the series	2a	3	4	5	6	7			
Retention Schedule Item #			ERec	Record Copy Dept.	Office (years)	Retention Period (years)	Records Center (years)	Records Disposition	Other	Vital Record	Retention Period Justification; Authorities; Remarks
21		Public Facility Site Selection Studies		Planning	see remarks						Planning may perform a site selection study for the location of a new public facility such as a school, fire station, police rifle range, etc. Planning will keep a site selection file on-site in the Planning Department, discarding a given file either five years after construction of the public facility is completed or thirty years (if the public facility is never constructed.)
22		Wetlands Assessments		Planning	C+29			X			Wetland assessments are individual evaluations that are used to assign designations in the Anchorage Wetlands Management Plan. The assessments are done on field data sheets (approximately 15-20 pages), and these sheets are retained for each wetland. Planning will retain these on site for 30 years before moving to historical archive.
23		Wetland Determinations (JDs - Jurisdictional Determinations by Corps of Engineers)		Planning	C+9			X			The Corps of Engineers is responsible for making the identification of an area as either wetland or non-wetland. These jurisdictional wetland determinations are added to the city's official wetland maps (Corps will retain a copy). Files should be retained on-site for 10 years before being moved to historical archive.
24		Wetland Permits		Planning	C+29			X			Wetland permits are issued by both the Corps of Engineers and the Planning Department. Permits issued by MOA Planning are retained on-site for 30 years before moving for historical archive.
25		Capital Improvement Program (CIP) for the Anchorage School District and the Municipality's General Government		OMB/ ASD	C + 9	15	X				The Planning & Zoning Commission (PZC) annually reviews the CIP for both the ASD and the MOA budget cycle. The Planning Department has a business need to keep CIP files for staff use to help PZC conduct its reviews. Planning keeps its working CIP files for 10 years on site and 15 years at the Records Center before destroying.



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Form 91-042A

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Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Ret. Sched. Code
Planning	Physical Planning		7944	1522	2	10/14/08	8 of 14
1	2		3	5	6	7	
Retention Schedule Item #	Record Series Title and Description of records included in the series	2a	3	4	5	6	7
		2a	3	4	5	6	7
		2a	3	4	5	6	7
26	Title 21, Anchorage Land Use Code -- Code Amendments - formal background documents		Planning C + 9	15	X		Any changes to municipal code are via Assembly ordinances officially recorded by the Clerk. However, the Planning Department maintains more extensive files documenting the history behind the changes made. For example, the re-write of the entire land use code that occurred between 2001 and 2009 is reflected in a request for proposal, annotated outline, diagnostic module, public review drafts, public hearing drafts, public comments received, and resolutions passed by the Planning and Zoning Commission. These formal background documents for amendments to the code will be kept on site at Planning for 10 years and at Records Center for 15 years before destruction.
27	Legal Land Use Agreements Wherein the Municipality is a Party to the Agreement		Law P				Although the Municipal Attorney's Office is responsible for tracking all legal agreements wherein MOA is a signatory party, the Planning Department is involved in the development of most such land use agreements and consulted about their history. Some examples of miscellaneous land use agreements are the North Anchorage Land Agreement (MOA and Fort Richardson), the NW Section 25 Agreement (MOA and State of AK), and Agreement of Compromise and Settlement (MOA and Eklutna Native Corporation.) Planning's Physical Planning Division permanently retains files in its offices on these agreements.
28	Zoning and Platting Case Review Comments prepared by the Physical Planning Division		Planning C + 9		X		Comments prepared by Physical Planning staff on zoning and platting cases will be retained on-site in Physical Planning's offices for 10 years before being discarded.



MUNICIPALITY OF ANCHORAGE RECORDS RETENTION SCHEDULE

Form 91-042A

(For Records Center Use Only)

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Ref. Sched. Code	
Planning	Land Use Review & Addressing		7944	1595	2	10/14/08	Page 9 of 14	
1	2		2a	3	4	5	6	7
Retention Schedule Item #	Record Series Title and Description of records included in the series	Record Copy Dept.	Office (years)	Records Center (years)	Destroy	Hist. Archive	Other	Vital Record
29	Addresses	X	Planning	P			X	
30	Public Street Name Changes		Planning	P				
31	Private Street Name Changes		Planning	P				
32	Land Use Review Staff's Comments on Platting & Zoning Cases (all types of cases: long plats, short plats, ZBEA cases, UDC cases, rezoning cases, conditional use cases, etc.)		Planning	3	X			

Per AMCR 21.81.002(C), "All official addresses shall be indicated in ink on the addressing base maps located in the planning department." Base maps are defined in AMCR 21.91.001(B). Since printed maps are instantly obsolete, maps are being printed as requested from stored digital data maintained by Addressing staff. (Planning will seek to have the AMCR language updated to reflect the more modern, digital age.)

Documentation explaining why a street name changed, including a map of the subject street, copies of public contact, comments received at the time, and any Assembly actions are saved and filed. Additionally, a copy of the official paperwork changing the street name (the Mayor-signed executive order) is kept by Planning, while the signed original is kept by the Clerk. Addressing staff permanently retains its files on street name changes in its offices since they are often asked when/why a particular street changed names.

Documentation explaining why the owner/land manager of a private street decided to change the street name, including Addressing's memorandum announcing the change, is kept on file indefinitely in Addressing's offices.

Land Use Review staff reviews zoning & platting cases and forwards its comments to the Zoning & Platting Division (Z&P). Z&P staff file all comments received from all agencies in the relevant case file which is retained for 50 years. Thus, Land Use Review keeps copies of its case comments on-site for 3 years for easy access and reference before disposing.



MUNICIPALITY OF ANCHORAGE RECORDS RETENTION SCHEDULE

Form 91-042A

For Records Center Use Only

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Ref. Sched. Code
Planning	Land Use Review & Addressing		7944	1595	2	10/14/08	Page 10 of 14
2	Record Series Title and Description of records included in the series	2a	3	4	5	6	7
Retention Schedule Item #		Erec	Record Copy Dept.	Office (years)	Records Center (years)	Records Disposition	Vital Record
33	Nonconforming Determinations		Planning	P			
34	Use Determinations		Planning	P			
35	Zoning Certifications		Planning	P			
36	Admin. Land Use Permit - Premises Where Minors Are Not Allowed		Planning	P			
37	Admin. Land Use Permit - Towers		Planning	see remarks			

Retention Period Justification; Authorities; Remarks

Nonconforming Determinations are historical records whereby the Municipality officially recognizes grandfathered structures, uses, and lots. Municipal Staff and the public utilize these records daily for real estate transactions, permitting, property development research, enforcement actions and public hearing case reviews. These records are kept in Land Use Review's offices for quick access and research purposes.

Use Determinations are official documentation about how the Municipality treats uses and development proposals with regard to municipal land use regulations. The records are accessed by staff and the general public to ensure consistency of past, present and future development. The records are kept in Land Use Review's offices for quick access and research purposes.

Zoning Certifications document that properties comply with municipal land use regulations for specific uses or structures at the time of the requests or reviews. These are often completed for real estate transactions or development proposals. They are permanent property records and are kept in Land Use Review's offices for quick access and research purposes.

These Admin. permit files establish a nonconforming use for the subject property immediately upon issuance and become a permanent property record. They are kept in Land Use Review's offices for quick access and research purposes.

Land Use Review keeps tower permits as permanent files in its offices for as long as each tower permit is active. Permit files may be disposed three years after a tower has been de-activated.



MUNICIPALITY OF ANCHORAGE RECORDS RETENTION SCHEDULE

Form 91-042A

For Records Carrier Use Only

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Rate-Schd. Code
Planning	Land Use Review & Addressing		7944	1595	2	10/14/08	Page 11 of 14
1	2		3	4	5	6	7
Retention Schedule Item #	Record Series Title and Description of records included in the series	2a	Record Copy Dept.	Office (years)	Records Center (years)	Records Disposition	Retention Period Justification; Authorities; Remarks
			ERec			Hist. Archive	
						Other	
38	Admin. Land Use Permit - Bed & Breakfast and Rooming House Establishments		Planning	see remarks			Land Use Review keeps the permits permanently in its offices for as long as a given site or facility is active. Files may be disposed three years after the bed & breakfast or rooming house use on a property has ceased.
39	Admin. Land Use Permit - Snow Disposal Site		Planning	see remarks			Land Use Review keeps the permits permanently in its offices for as long as a given site is active. Files may be disposed three years after use of a property as a snow disposal site has ceased.
40	Child/Adult Care Facility License Review		Planning	see remarks			Land Use Review keeps its license reviews/inspection records on file permanently in its offices for as long as a given facility is active. Records may be disposed 5 years after use of a property as a child or adult care facility license review has ceased.
41	Liquor License Review		Planning	see remarks			Land Use Review keeps its license review records on file permanently in its offices for as long as a given facility is active. Records may be disposed 5 years after use of a property as a liquor establishment has ceased.
42	Adult-Oriented Establishment		Planning	see remarks			Land Use Review keeps these records on file permanently in its offices for as long as a given facility is active. Records may be disposed 5 years after use of a property as an adult-oriented establishment has ceased.
43	Unlicensed Nightclub		Planning	see remarks			Land Use Review keeps these records on file permanently in its offices for as long as a given facility is active. Records may be disposed 5 years after use of a property as an unlicensed nightclub has ceased.
44	Amusement Park		Planning	see remarks			Land Use Review keeps its records on file permanently in its offices for as long as a given facility is active. Records may be disposed 5 years after use of a property as an amusement park has ceased.



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Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Rel. Sched. Code
Planning	Land Use Review & Addressing		7944	1595	2	10/14/08	Page 12 of 14
1	2						
Retention Schedule Item #	Record Series Title and Description of records included in the series	2a	3	4	5	6	7
		ERec	Record Copy Dept.	Office (years)	Records Center (years)	Records Disposition	Vital Record
						Other	
45	Secondhand/Pawn Facilities Business License Reviews		Planning	see remarks			Land Use Review keeps these records on file permanently in its offices for as long as a given facility is active. Records may be disposed 5 years after use of a property as a secondhand/pawn facility has ceased.
46	Towing Operator Facility Review		Planning	see remarks			Land Use Review keeps these records on file permanently in its offices for as long as a given facility is active. Records may be disposed 5 years after use of the property as a towing operator's facility has ceased.
47	Kennel Facility Review		Planning	see remarks			Land Use Review keeps these records on file permanently in its offices for as long as a given facility is active. Records may be disposed 5 years after use of a property as a kennel has ceased.
48	Accessory Dwelling Unit Files/Parking Agreements/Access and/or Joint Use Agreements		Planning	see remarks			Land Use Review keeps these records on file permanently in its offices for as long as the use is active. Records may be disposed 5 years after a property use has ceased.



MUNICIPALITY OF ANCHORAGE RECORDS RETENTION SCHEDULE

Form 91-042A

For Records Center Use Only

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Ref. Sched. Code
1	2	2a	3	4	5	6	7
Retention Schedule Item #	Record Series Title and Description of records included in the series	ERec	Record Copy Dept.	Office (years)	Records Center (years)	Records Disposition: Destroy, Hist. Archive, Other, Vital Record	Retention Period Justification; Authorities; Remarks
49	Payroll Records		Planning	C + 2	2	X	4 year retention period comes from the Finance Dept.
50	Accounts Payable Files		Planning	C + 4		X	Finance revised its records retention schedule in December of 2007, establishing the audit year plus 3 years as the retention period. Purchasing, however, indicates that P-Card records must be kept for current year plus 4 years. Since Planning keeps all AP records together and store all AP records for 5 years on-site (Also, while A+3 and C+4 are not exactly the same, they do generally cover the same time horizons.) In regards to contracts and purchase orders, Purchasing is the official recordkeeper but Planning will retain its copies of contractual documents for 5 years on-site.
51	Other Accounting Records (i.e., journal entries, travel records, bills for collection, etc.)		Finance	C + 4		X	
52	Director's Reading Files (incoming/outgoing correspondence)		Planning	C + 6		X	
53	Personnel Files		Employee Relations	see remarks			Official files are kept by Employee Relations. Planning keeps copies of some personnel documents in its on-site personnel files, but whenever an employee leaves municipal employment, the file is sent to Employee Relations. If the employee transfers from Planning to a different department, the file is transferred to the new department.
54	OSHA Docs: OSHA Form 300A - Summary of Work-Related Injuries and Illnesses and OSHA Form 300 Log of Work-Related Injuries and Illnesses		Planning	C + 5		X	Alaska Occupational Safety and Health Law requires the summary for the prior year to be posted from Feb. 1 until March 1 and thereafter filed. These OSHA documents must be retained 5 years.



MUNICIPALITY OF ANCHORAGE RECORDS RETENTION SCHEDULE

Form 91-042A

Department		Division	Section		Phone #	Dept. ID	Revision #		Effective Date	Page 14 of 14		Ref. Sched. Code	
Planning		Administration			7944	1506	2		10/14/08				
1	2												
Retention Schedule Item #	Record Series Title and Description of records included in the series												
55	Hiring Records - Certification Lists of Job Candidates, applications and interview files												
2a		3		4		5		6		7		Retention Period Justification; Authorities; Remarks	
ERec		Record Copy Dept.		Office (years)		Records Center (years)		Destroy		Hist. Archive			Vital Record
		Planning		C + 2		X						Certification list instructions indicate that Planning must keep all documentation related to the interview process on file for two years in accordance with state and federal laws.	



MUNICIPALITY OF ANCHORAGE RECORDS RETENTION SCHEDULE

Records Retention Schedule - Update Log (Form 91-042B)

Retention Schedule Update Log

Enter Department - Division - Section - Phone # - Dept. ID - Revision # - Effective Date exactly as entered on 91-042A

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Rel. Sched. Code
Planning	all		7944		2	10/14/08	Page 1 of 7

Use this Retention Schedule Update Log to provide supporting information about the changes to this version of the Retention Schedule from the previous version. Use the space provided to list the Records Series and Record types that have been changed in the new version. Indicate whether they were added or deleted. Provide information about those records series, with description of record types, that have been added to the new retention schedule or deleted from the previous retention schedule.

In the space below, provide information about the previous version of the Retention Schedule that you are updating.

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Rel. Sched. Code
Planning	all		7944		#1	8/16/1995	

Use the space below for any supporting narrative about the current version of the retention schedule that is being updated: Include reasons for updating, such as departmental reorganization and all pertinent information about the update process. Use all the space you need to make it clear about what has changed.

Supporting Narrative:

Enter narrative here The schedule is being updated given that the earlier 8/16/95 schedule was incomplete and written more like an index to a particular box or boxes (snapshot in time) rather than as a records retention plan describing the types of records generated and the business need for retaining the different types of records.

In the space below, list out item numbers and Records Series Titles and description from the Retention Schedule that is being updated. Indicate if the Records Series or record types have been added or removed from the previous schedule. Provide explanation for the change in the appropriate row.

Retention Schedule Item #	Record Series Title and Description of records included in the series	Added	Removed	Explanation of the added or deleted records series.
former #1 Admin	Air Installation Compatible Use Zone		x	These records pertain to a study about Elemendorf AFB and air space/land use compatibility in surrounding areas. This is not the name for a records series but a specific study. These records should continue to be retained at the Records Center.
former #2 Admin	AEDC Minutes & Agendas		x	AEDC in this case stands for the Anchorage Economic Development Commission which was a municipal board with persons appointed to it and staffed by the Planning Department (this commission was in place before the nonprofit Anchorage Economic Development Corporation was created.) No records are generated now, as the commission no longer exists. However, old records should be transferred as historical records to Archives.
former #3 Admin	AEDC Tapes		x	AEDC in this case stands for the Anchorage Economic Development Commission which was a municipal board with persons appointed to it and staffed by the Planning Department (this commission was in place before the nonprofit Anchorage Economic Development Corporation was created.) No records are generated now, as the commission no longer exists. However, old records should be transferred as historical records to Archives.

Retention Schedule Update Log - Continued

Enter the Retention Schedule information below exactly as it appears on the Signature Page.

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date	Rel. Sched. Code
Planning	all		7944		2	10/14/08	Page 2 of 7

Retention Schedule Item #	Record Series Title and Description of records included in the series	Added	Removed	Explanation of the added or deleted records series.
former #4 Admin	Economic Data Files		x	The old schedule showed that these records were permanently retained in Planning's offices. We cannot tell for sure what "economic data files," referred to, and this item should be removed due to its vagueness.
former #5 Admin	North Mt. View Neighborhood Improvements		x	This is not the name for a records series but sounds like an issue that was active in 1995. Old schedule said that the records would be kept 5 years in the office and then be permanently transferred to Records Center. However, if any boxes at the Records Center can be located under this former retention schedule item #5, do not destroy the records until Planning staff has had an opportunity to review them.
former #6 Admin	Population/Census 1980		x	The most recent census was 2000; there should be no reason to retain 1980 census files.
former #7 Admin	Railbelt Corporation		x	This is not the name for a records series but sounds like an issue that was active in 1995. Old schedule said that the records would be permanently transferred to Records Center. However, if any boxes at the Records Center can be located under this former retention schedule item #7, do not destroy the records until Planning staff has had an opportunity to review them.
former #8 Admin	Spenard Commercial District Dev. Strat.		x	Included under item #19 in the new schedule. The Spenard Commercial District Development Strategies is a document adopted as an element of the Anchorage Comprehensive Plan. These records are staff's working papers used to prepare the document, and, like all other such records, shall be retained on-site for 30 years to save existing data for comparison to new data in preparing updates.
former #9 Admin	S&S Apartments		x	Name of some specific files rather than name for a records series - however, do not destroy without first allowing Planning staff to review any such boxes.
former #10 Admin	General Planning Files		x	This description is too vague to know what these files are. However, do allow Planning staff to review any such files found in the Records Center before destroying.
former #11 Admin	Misc. Planning Projects		x	This description is too vague to know what these files are. However, do allow Planning staff to review any such files found in the Records Center before destroying.
former #1 Z&P	Planning & Zoning Minutes		see comments	Included under item #2 on the new schedule
former #2 Z&P	Planning & Zoning Commission Resolutions		see comments	Included under item #1 on the new schedule

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Retention Schedule Item #	Record Series Title and Description of records included in the series	Added	Removed	Explanation of the added or deleted records series.
former #3 Z&P	Planning & Zoning Commission Case Files		see comments	Included under item #4 on the new schedule
former #4 Z&P	Service Area Annexations		see comments	Clerk's Office keeps these official records.
former #5 Z&P	Planning & Zoning Commission Tapes		see comments	Included under item #2 on the new schedule
former #6 Z&P	Planning & Zoning Commission Agendas		see comments	Included under item #10 on the new schedule
former #7 Z&P	P & Z Commission Case Log-in Books		see comments	These records are no longer generated, as case tracking is now handled using the Cityview database.
former #8 Z&P	P & Z Commission Action Summaries		see comments	These records are no longer generated, as board and commission actions' are now reflected in the resolutions passed by each board or commission.
former #9 Z&P	Legal Notices		see comments	Included under item #10 on the new schedule; also copy of legal notice is also kept in the appropriate case file (Items 4 thru 7 on the new schedule.)
former #10 Z&P	Liquor Licenses		see comments	Liquor establishments go through a zoning conditional use process. Information about such cases are in the zoning case files (item #4 on the new schedule.)
former #11 Z&P	Case Comments for ZBEA (Zoning Board of Examiners and Appeals)		see comments	Included in the ZBEA case files; item #6 on the new schedule.
former #12 Z&P	Bonus Points for CBD (CBD means Central Business District)		see comments	Included under item #8 on the new schedule
former #13 Z&P	Z & P Fee Schedule		x	All fees are found in the Anchorage Municipal Code or Municipal Code of Regulations. The code comprehensively provides the legislative history for the fees so there is no need to maintain historical fee schedules.
former #14 Z&P	Title 21		see comments	Included under items 11 and 25 on the new schedule
former #15 Z&P	Hearing Officer Findings		see comments	Official Hearing Officers' records are retained by the AHO. Hearings Officer cases are most likely about zoning enforcement cases. At times zoning enforcement has been lodged under Planning, but presently Development Services is responsible zoning enforcement - so these records now pertain to Dev. Svcs.
former #16 Z&P	Areawide Rezoning		see comments	Included under items 13 and 14 on the new schedule.
former #17 Z&P	Legal Opinions		see comments	Included under item 12 on the new schedule
New #1 (Dept ID 1531)	Resolutions	x		The Planning Department completely rewrote its retention schedule, to better describe the records generated and the business needs for retention (as well as how/where the records are retained.)

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Retention Schedule Item #	Record Series Title and Description of records included in the series	Added	Removed	Explanation of the added or deleted records series.
New #2 (Dept ID 1531)	Board & Commission Meeting Minutes and Cassette Tapes	x		same as above
New #3 (Dept ID 1531)	Notice of Zoning Action	x		same as above
New #4 (Dept ID 1531)	Zoning Case Files	x		same as above
New #5 (Dept ID 1531)	Platting Case Files	x		same as above
New #6 (Dept ID 1531)	Zoning Board of Examiners & Appeals Case Files	x		same as above
New #7 (Dept ID 1531)	Urban Design Commission Case Files	x		same as above
New #8 (Dept ID 1531)	Bonus Points Files	x		same as above
New #9 (Dept ID 1531)	Invoices for Platting & Zoning Fees	x		same as above
New #10 (Dept ID 1531)	Zoning & Platting General Working Files	x		same as above
New #11 (Dept ID 1531)	Title 21 Code Books (each new version issued)	x		same as above
New #12 (Dept ID 1531)	Municipal Legal Opinions about Zoning Matters	x		same as above
New #13 (Dept ID 1522)	Areawide Zoning Amendment Case Files	x		same as above
New #14 (Dept ID 1522)	Areawide zoning Amendments - Official Mylar Zoning Maps	x		same as above
New #15 (Dept ID 1522)	Geotechnical Advisory Commission Meeting Packets	x		same as above
New #16 (Dept ID 1522)	Geotechnical Advisory Commission and Meeting Minutes Resolutions	x		same as above

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Retention Schedule Item #	Record Series Title and Description of records included in the series	Added	Removed	Explanation of the added or deleted records series.
New #17 (Dept ID 1522)	Geotechnical Advisory Commission Meetings Tapes	x		same as above
New #18 (Dept ID 1522)	Anchorage Comprehensive Plan and All Plans & Studies Adopted as Elements of the Area-wide Plans	x		same as above
New #19 (Dept ID 1522)	Land Use Plans and Studies Working Files/Data Sels	x		same as above
New #20 (Dept ID 1522)	Other Planning Studies (Not Adopted as Elements to an Area-wide Comprehensive Plan)	x		same as above
New #21 (Dept ID 1522)	Public Facility Site Selection Studies	x		same as above
New #22 (Dept ID 1522)	Wetlands Assessments	x		same as above
New #23 (Dept ID 1522)	Wetland Determinations (Jurisdictional Determinations by the Corps of Engineers)	x		same as above
New #24 (Dept ID 1522)	Wetland Permits	x		same as above
New #25 (Dept ID 1522)	Capital Improvement Program (CIP) for ASD and MOA General Government	x		same as above
New #26 (Dept ID 1522)	Title 21, Anchorage Land Use Code - Code Amendments/Formal Background Documents	x		same as above
New #27 (Dept ID 1522)	Legal Land Use Agreements Wherein the Municipality is a Party to the Agreement	x		same as above
New #28 (Dept ID 1522)	Zoning and Platting Case Review Comments prepared by the Physical Planning Division	x		same as above
New #29 (Dept ID 1595)	Addresses	x		same as above
New #30 (Dept ID 1595)	Public Street Name Changes	x		same as above
New #31 (Dept ID 1595)	Private Street Name Changes	x		same as above

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Retention Schedule Item #	Record Series Title and Description of records included in the series	Added	Removed	Explanation of the added or deleted records series.
New #32 (Dept ID 1595)	Land Use Review Staff's Comments on Platting & Zoning Cases	x		same as above
New #33 (Dept ID 1595)	Nonconforming Use Determinations	x		same as above
New #34 (Dept ID 1595)	Use Determinations	x		same as above
New #35 (Dept ID 1595)	Zoning Certifications	x		same as above
New #36 (Dept ID 1595)	Admin. Land Use Permit - Premises Where Minors Are Not Allowed	x		same as above
New #37 (Dept ID 1595)	Admin. Land Use Permit - Towers	x		same as above
New #38 (Dept ID 1595)	Admin. Land Use Permit - Bed & Breakfast Establishments	x		same as above
New #39 (Dept ID 1595)	Admin. Land Use Permit - Snow Disposal Site	x		same as above
New #40 (Dept ID 1595)	Child/Adult Care Facility License Review	x		same as above
New #41 (Dept ID 1595)	Liquor License Review	x		same as above
New #42 (Dept ID 1595)	Adult-Oriented Establishment	x		same as above
New #43 (Dept ID 1595)	Unlicensed Nightclub	x		same as above
New #44 (Dept ID 1595)	Amusement Park	x		same as above
New #45 (Dept ID 1595)	Secondhand/Pawn Facilities Business License Reviews	x		same as above
New #46 (Dept ID 1595)	Towing Operator Facility Review	x		same as above

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Retention Schedule Item #	Record Series Title and Description of records included in the series	Added	Removed	Explanation of the added or deleted records series.
New #47 (Dept ID 1595)	Kennel Facility Review	x		same as above
New #48 (Dept ID 1595)	Accessory Dwelling Unit Files/Parking Agreements/Access and/or Joint Use Agreements	x		same as above
New #49 (Dept ID 1595)	Payroll Records	x		same as above
New #50 (Dept ID 1506)	Accounts Payable Files	x		same as above
New #51 (Dept ID 1506)	Other Accounting Records	x		same as above
New #52 (Dept ID 1506)	Director's Reading Files	x		same as above
New #53 (Dept ID 1506)	Personnel Files	x		same as above
New #54 (Dept ID 1506)	OSHA Documents	x		same as above
New #55 (Dept ID 1506)	Hiring Records	x		same as above

Content ID: 006888**Type:** RecRetentionSched -**Title:** Planning Department - Retention Schedule Update**Author:** pruittns**Initiating Dept:** IT**Date Prepared:** 10/1/08 3:31 PM**Director Name:** Fred Carpenter**Assembly Meeting Date:** 10/14/08

Workflow Name	Action Date	Action	User	Security Group	Content ID
Clerk_Admin_SubWorkflow	10/3/08 11:11 AM	Exit	Heather Handyside	Public	006888
MuniMgrCoord_SubWorkflow	10/3/08 11:11 AM	Approve	Heather Handyside	Public	006888
MuniManager_SubWorkflow	10/3/08 10:45 AM	Approve	Michael Abbott	Public	006888
InternalAudit_SubWorkflow	10/2/08 4:05 PM	Approve	Peter Raiskums	Public	006888
Controller_SubWorkflow	10/2/08 1:45 PM	Approve	Teresa Peterson	Public	006888
Muni_Clk_SubWorkflow	10/2/08 1:00 PM	Approve	Barbara Gruenstein	Public	006888
Archivist_SubWorkflow	10/2/08 12:54 PM	Approve	Toby Allen	Public	006888
CFO_SubWorkflow	10/2/08 12:48 PM	Approve	Sharon Weddleton	Public	006888
CFO_SubWorkflow	10/2/08 11:10 AM	Checkin	Nina Pruitt	Public	006888
IT_SubWorkflow	10/1/08 4:14 PM	Approve	Fred Carpenter	Public	006888
RecRetentionSched	10/1/08 3:43 PM	Checkin	Toby Allen	Public	006888