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. 2008-229

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

WHEREAS, The Purchasing Department has updated its Records Retention Schedule; and

WHEREAS, in accordance with Municipal Policy and Procedure 52-2, the Records Management Officer has reviewed the Records Retention Schedule and forwarded it for review and approval to the Municipal Archivist, Clerk, Internal Auditor and Controller; and

WHEREAS, the Municipal Archivist, Clerk, Internal Auditor and Controller have reviewed and approved the Records Retention Schedule.

NOW, therefore, the Anchorage Assembly adopts the Retention Schedule as submitted, reviewed and approved.

PASSED AND APPROVED by the Anchorage Municipal Assembly this 14th day of October, 2008.

Chair

ATTEST:

Municipal Clerk

MUNICIPALITY OF ANCHORAGE
RECORDS RETENTION SCHEDULE

Records Management Use Only

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date		Ret. Schd. Code
Purchasing	0	0	343-4691	1912	0	8/1/2008	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	Barton R. Mauldin	Barton R. Mauldin	7/30/08
Agency Records Coordinator	Shannon Royster	Shannon Royster	7/30/08
Records Management Officer	Fred S. Carpenter		
Archivist	Toby Allen		
Clerk	Barbara E. 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. Schd. Code
Purchasing			343-4691	1912		7/30/2008	Page 1 of 2	

1 Retention Schedule Item #	2 Record Series Title and Description of records included in the series	2a ERec	3 Record Copy Dept.	4 Retention Period: Office (years)	4 Retention Period: Records Center (years)	5 Records Disposition: Micro-film	5 Records Disposition: Destroy	5 Records Disposition: Hist. Archive	5a Other	6 Vital Record	7 Retention Period Source Citation or Other Justification
1	Supply Bids		PUR	C+ 3	2 Yrs						Records are consistant to SOA, Federal and IRS
2	Surplus Bids		PUR	C + 4	0						financial records. Any records that has a longer
3	Surplus Auctions		PUR	C + 3	2 Yrs						term contract or legal obligation, is kept in office
4	Express/Request for Voucher Check		PUR	C + 4	0						or archived as a permament record with a long
5	Construction Bids		PUR	C+ 2	5 Yrs						range date for destruction.
6	Purchase Orders		PUR	C + 5	2 Yrs						The above jusitification applies to line 1 through 10.
7	Request for Proposal (RFP) successful submittals		PUR	C + 1	4 Yrs						
8	Request for Proposal (RFP) unsuccessful submittals		PUR	C + 1	0						
9	Request for Quotations		PUR	C + 3	2 Yrs						
10	Audio Tapes - Pre, Openings, & Post Bids		PUR	C + 2	0						
11	Procurement Cards		PUR	C + 4	0						P&P 48-16, 7, b, 5 and Audits records consistant with Local, State, Federal and IRS financial records.

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 dispositon. 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.

5a Other: If final disposition (other than microfilm, destroy, historical archive) is Digitization (scanning), 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 or Other Justification: Cite the source authority for the mandated retention period or justify the retention period with a sound administrative, fiscal or legal need. Use all the space you needed to clarify all information about the retention period and/or 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. Schd. Code
Purchasing	0	0	343-4691	1912	0	7/30/2008	Page 2 of 2	

1 Retention Schedule Item #	2 Record Series Title and Description of records included in the series	2a ERec	3 Record Copy Dept.	4 Retention Period: Office (years)	Records Center (years)	5 Records Disposition: Micro-film	Destroy	Hist. Archive	5a Other	6 Vital Record	7 Retention Period Justification; Authorities; Remarks
12	Purchase Order Register		PUR	P	0						Items 12, 13 & 14 destruction advisement under the
13	General Office Files		PUR	C + 4	0						direction of the Purchasing Officer.
14	Master Contracts and Agreement		PUR	P	0						

MUNICIPALITY OF ANCHORAGE
RECORDS RETENTION SCHEDULE

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

Retention Schedule Update Log

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

Department	Division	Section	Phone #	Dept. ID	Revision #	Effective Date		Ret. Schd. Code
Purchasing	0	0	343-4691	1912	0	7/30/2008	Page __1__ of __2__	

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		Ret. Schd. Code
Purchasing			343-4691	1912		6/12/1995		

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 reorganzation and all pertinent information about the update process. Use all the space you need to make it clear about what has changed.

Supporting Narrative:	Using the old retention schedule: deletions, changes and additions are listed below.

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.
1	Supply Bids			Retention schedule changed, C+3 in-house, 2 yrs record center
2	Local Purchase Orders (LPO's)		X	
3	Surplus Bids			Retention schedule changed, C+4 in-house, no record center retention
4	Surplus Acutions			Retention schedule changed, C+3 in-house, 2 yrs record center
5	Express/Request for Voucher Checks			New description and schedule changed, C+4, no record center retention
6	Construction Bids			Retention schedule changed, C+2, 5 yrs record center
7	Purchase Orders (Numerical)			Retention schedule changed, C+5, 2 yrs record center
8	Purchase Orders (Alphabetical)		X	
9	RFP's Including Successful Submittal			New description and retention schedule changed, C+1, 4 yrs record center
10	RFP's (Submittals Only)			New description and retention schedule changed, C+1, no record center retention

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		Ret. Schd. Code
Purchasing	0	0	343-4691	1912	0	6/12/1995	Page 2 of 2	

Retention Schedule Update Log continued

Retention Schedule Item #	Record Series Title and Description of records included in the series	Added	Removed	Explanation of the added or deleted records series.
11	Request for Quotations			Retention schedule changed, C+3, 2 yrs record center
12	Conference tapes for Pre-bid, Bid Openings, Post Bids, etc.			New description and retention schedule changed, C+2, no record center retention
13	Purchase Order Register	X		Permanent in-house, no record center retention
14	General Office Files	X		C+4, no record center retention
15	Master Contracts and Agreements	X		Permanent in-house, no record center retention

Content ID: 006892
Type: RecRetentionSched -
Title: Purchasing Department â€" Records Retention Schedule Update
Author: pruittns
Initiating Dept: IT
Date Prepared: 10/1/08 6:42 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	006892
MuniMgrCoord_SubWorkflow	10/3/08 11:11 AM	Approve	Heather Handyside	Public	006892
MuniManager_SubWorkflow	10/3/08 10:46 AM	Approve	Michael Abbott	Public	006892
InternalAudit_SubWorkflow	10/2/08 4:25 PM	Approve	Peter Raiskums	Public	006892
Controller_SubWorkflow	10/2/08 3:52 PM	Approve	Teresa Peterson	Public	006892
Muni_Clk_SubWorkflow	10/2/08 3:34 PM	Approve	Barbara Gruenstein	Public	006892
Archivist_SubWorkflow	10/2/08 3:32 PM	Approve	Toby Allen	Public	006892
CFO_SubWorkflow	10/2/08 3:28 PM	Approve	Sharon Weddleton	Public	006892
CFO_SubWorkflow	10/2/08 1:34 PM	Checkin	Nina Pruitt	Public	006892
IT_SubWorkflow	10/2/08 8:32 AM	Approve	Fred Carpenter	Public	006892
RecRetentionSched	10/1/08 6:45 PM	Checkin	Toby Allen	Public	006892