



Office of the Common Council - City Clerk
City Records Center

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June 15, 2022

To: City Information Management Committee
From: Brad Houston, City Records Officer
Re: RRDAs for 2022 Q2 review from Treasurer's Office

Esteemed members of the committee,

Reviewing the report of schedules for tomorrow's meeting, I discovered 13 retention schedules set to be superseded under ambiguous circumstances. These schedules, all containing "E" in their schedule number, were created by my predecessor at a time when it was accepted best practice to create one Records Retention and Disposition Authority (RRDA) for each format in which a record could reside. Since then, professional best practice has shifted to creation of one records schedule for all records in any format, and the state records board has indicated that they will not approve more than one schedule for the same series going forward. We have therefore for the past 5 years been closing format-specific retention schedules, consolidating them in a 0-series where possible (e.g. 60-M330 and 60-9330 become 60-0330) and assigning to them the longest retention of the schedules so combined.

When City Records staff contacted the office of the City Treasurer for review of that office's retentions schedules, our contact at that office indicated that a number of schedules following the above naming patterns could be consolidated (see attached email from Jim Klajbor dated 5/12/22). The CIMC report and related close/supersede forms you have received for tomorrow's meeting reflects these consolidations in closing schedules with E- numbers. Unfortunately, for all but three of these schedule pairs, the primary retention for the records (i.e. that retention required for administrative, legal, or fiscal reasons) was in fact reflected in the schedule for the electronic version of the records. The existing 0-number schedules reflect retention periods for paper versions of records following conversion to electronic format, often less than 1 month after this has occurred. **Assigning shorter retention periods to these records was NOT the intention of City Records.**

Because the eight schedules affected by this error are not due for renewal by the state records board until 2025, and because the superseded versions of the schedules reflect the desired retention periods as required by the public records board, It is my recommendation that the E-series be superseded as indicated, and that the retention period of the following schedule numbers be changed as administrative corrections, without requiring submission of the changes to the state records board:

- 15-0023: Retention changed to FY +4 years and destroy confidentially
- 15-0024: Retention changed to FY +7 years and destroy confidentially
- 15-0025: Retention changed to FY +7 years and destroy confidentially



- 15-0026: Retention changed to Cancellation of EFT agreement + 4 years and destroy confidentially
- 15-0027: Retention changed to FY + 4 years and destroy confidentially
- 15-0028: Retention changed to FY + 1 year and destroy confidentially
- 16-0023: Retention changed to Creation + 3 years and destroy confidentially
- 15-0029: Retention changed to FY + 3 years and destroy confidentially

Attached, please find both the referenced email and an updated CIMC report excerpt with these changes reflected. I am happy to answer any questions you might have about this recommendation during tomorrow's meeting, as well as to carry over these changes to Q3 if the committee deems it necessary to do so.

Sincerely,

A handwritten signature in black ink, appearing to read "Brad Houston".

Brad Houston, CRM
City Records Officer
Milwaukee Municipal Research Center

Encl: Jim Klajbor Email; CART Q2 2022_TreasChanges.xlsx; Treasurer Q2 Superseded.docx

Cc: David Henke, Jim Owczarski, Maggie Turner