



AGENDA
COMMITTEE OF THE WHOLE

Tuesday, December 17, 2019

6:30 p.m.

Common Council Chambers, 224 East Jefferson Street

Mayor Jeannie Hefty
Susan Kott, Alderman, 1st District
Theresa Meyer, Alderman, 1st District
Bob Grandi, Alderman, 2nd District
Ryan Heft, Alderman, 2nd District
Steve Rauch, Alderman, 3rd District
Jon Schultz, Council President, Alderman, 3rd District
Thomas Preusker, Alderman, 4th District
Todd Bauman, Alderman, 4th District

Student Representatives:

Thomas Martin, Student Representative (BHS)
Peter DeSmidt, Student Representative (CCHS)

1. **Call to Order - Roll Call**
2. **Citizen Comments**
3. **Approval of Minutes** (*B. Grandi*)
 - A. To approve the December 3, 2019 Committee of the Whole Meeting Minutes.
4. **RESOLUTIONS:**
 - A. **Resolution 4976(29)** - Approval of an Agreement between Burlington Rescue Squad, Inc. and the City of Burlington to Convey Assets of both Equipment and Property according to the Plan of Dissolution.
 - B. **Resolution 4977(30)** - To consider approving an amendment to the City of Burlington Fee Schedule.
5. **ORDINANCES:**
 - A. **Ordinance 2054(20)** - To approve Repealing and Recreating the Provisions of Chapter 67-10 of the Municipal Code for the City of Burlington regarding Destruction of Records and to Adopt and Replace with the State of Wisconsin Municipal Records Schedule (WMRS).
6. **MOTIONS:**
 - A. **Motion 19-950** - To approve a Pediatric Jump Kit donated by the Wisconsin EMS Association (WEMSA) Foundation and Kids Health Vista Foundation.

7. **ADJOURNMENT** (R. Heft)

Note: If you are disabled and have accessibility needs or need information interpreted for you, please call the City Clerk's Office at 262-342-1161 at least 24 hours prior to the meeting.



COMMITTEE OF THE WHOLE

ITEM NUMBER 3A

DATE: December 17, 2019

SUBJECT: MEETING MINUTES - To approve the December 3, 2019 Committee of the Whole Meeting Minutes.

SUBMITTED BY: Diahnn Halbach, City Clerk

BACKGROUND/HISTORY:

The attached minutes are from the December 3, 2019 Committee of the Whole meeting.

BUDGET/FISCAL IMPACT:

N/A

RECOMMENDATION:

Staff recommends approval of the attached minutes from the December 3, 2019 Committee of the Whole meeting.

TIMING/IMPLEMENTATION:

This item is scheduled for final consideration at the December 17, 2019 Common Council meeting.

Attachments

COW Minutes



City Clerk
300 N. Pine Street, Burlington, WI, 53105
(262) 342-1161 - (262) 763-3474 fax
www.burlington-wi.gov

CITY OF BURLINGTON
Committee of the Whole Minutes
Jeannie Hefty, Mayor
Diahnn Halbach, City Clerk
Tuesday, December 3, 2019

1. **Call to Order - Roll Call**

Mayor Jeannie Hefty called the Common Council meeting to order at 6:30 p.m. Roll Call - Present: Alderman Susan Kott, Alderman Theresa Meyer, Alderman Bob Grandi, Alderman Steve Rauch, Alderman Jon Schultz, Alderman Tom Preusker, Alderman Todd Bauman. Excused: Alderman Ryan Heft (arrived at 6:40 p.m.).

Student Representatives - Present: Peter DeSmidt (CCHS). Excused: Thomas Martin (BHS),

Staff present: City Attorney John Bjelajac, City Administrator Carina Walters, Assistant City Administrator/Zoning Administrator Megan Watkins, Finance Director Steven DeQuaker, Public Works Director Peter Riggs, Police Chief Mark Anderson, Building Inspector Gregory Guidry, Library Director Joe Davies, and City Intern Nicholas Faust.

2. **Citizen Comments**

Joann Koenecke, 541 E. State Street, officially announced her candidacy for First District Alderman and also stated that she has organized an event for Sexual Assault Awareness which is scheduled for Wednesday, January 22, 2020 at 5:30 p.m. at the Burlington High School.

3. **Approval of Minutes** - To approve the November 19, 2019 Committee of the Whole Meeting Minutes. Motion: Alderman Rauch. Second: Alderman Bauman. With all in favor, the motion carried.

4. **DISCUSSION:**

A. An update from Honeywell Energy Services Group regarding the Energy Services Agreement with the City of Burlington.

Administrator Walters provided background history stating that the City of Burlington entered into an Energy Services Agreement with Honeywell in October 2013 and that over the past several years a representative from Honeywell has provided an update on the City's energy performance and recommends ways that the City can maximize energy savings.

Thomas Dauer, from Honeywell, provided Council an overview of the Annual Cost Avoidance Report. Dauer stated that during the flood of 2017, all data was lost from the servers and all equipment needed to be replaced and that trend data became available again in June 2018. Dauer also stated that currently the cumulative cost savings is 15% ahead of the guarantee.

Alderman Schultz asked why the guarantee was so low during the construction period. Dauer replied that the guaranteed savings doesn't start to kick in until after Year 1, after all construction is completed.

Alderman Grandi asked Dauer to explain in further detail the damage that occurred to the equipment during the flood. Dauer responded that he didn't have the details of the flood itself, however, the servers were

underwater and that all stored data wasn't able to be retrieved. Grandi then asked if the 2018 data is meaningful. Dauer responded that data being gathered from stipulated savings through energy conservation measure is good and is part of the guaranteed savings. Grandi then asked how the \$1.2 million for the program was paid. Walters responded that the City financed the program through a loan.

Alderman Schultz asked how the guaranteed savings relates to the loan. Dauer replied that the guaranteed savings doesn't relate to the loan and that the guarantee is there to ensure that the City is saving as much as possible.

5. **RESOLUTIONS:**

- A. **Resolution 4975(28)** - Approving an Agreement with Life Line Billing Systems as a Third Party Provider for City of Burlington Ambulance Billing Services.

Director DeQuaker explained that the City of Burlington Fire Department will be providing Ambulance services beginning January 1, 2020 and realized a billing service company was needed to provide billing to the users of the ambulance. DeQuaker stated that the City of Burlington researched service billing providers and found that Life Line Billing Systems, LLC is well known for providing this type of service and are skilled in Medicare and Medicaid billing. DeQuaker explained that charges for this service are at 6% for normal collection and 24% for delinquent collections and that the 2020 EMS budget is proposing a very conservative 65% collection return. DeQuaker introduced Chip Kramer from Life Line Billing to answer any questions.

Alderman Meyer asked if other companies were explored. DeQuaker responded that this is a very specialized type of service and Life Line also provides services for the Town of Raymond, of which Chief Babe is familiar with.

Alderman Schultz asked what percentage of accounts typically become delinquent. Kramer responded that usually 10% become delinquent, however, they try to work with the patient as much as possible and offers payment programs and hardship programs.

6. **ORDINANCES:**

- A. **Ordinance 2053(19)** - To amend Section 286-3B to increase Hotel/Motel Room Tax to 8%.
Steve DeQuaker provided an overview and background of the hotel/motel room tax and stated that the current room tax is 6%, which was set in 2014 and is collected quarterly from The Hampton Inn, Skyview Motel, and the AmericInn. DeQuaker explained that 30% of the fees collected is deposited into the General Fund for use as directed by the Common Council, while the remaining 70% is divided equally between the Chamber of Commerce and Real Racine. DeQuaker stated that staff has met with Real Racine and the Chamber of Commerce to identify where room tax dollars can be spent in either establishment or new venues as directed by the Common Council and if the increase is approved, would like to apply the additional 2% to wayfinding signage.

7. **MOTIONS:** NONE

8. **ADJOURNMENT**

Motion: Alderman Schultz. Second: Alderman Preusker. With all in favor, the motion carried and the meeting adjourned at 7:02 p.m.

Minutes respectfully submitted by:

Diahm C. Halbach
City Clerk
City of Burlington



COMMITTEE OF THE WHOLE**ITEM NUMBER 4A**

DATE: December 17, 2019**SUBJECT:** **RESOLUTION 4976(29)** - Approval of an Agreement between Burlington Rescue Squad, Inc. and the City of Burlington to Convey Assets of both Equipment and Property according to the Plan of Dissolution.**SUBMITTED BY:** Carina Walters, City Administrator

BACKGROUND/HISTORY:

On December 2, 2019, the Burlington Rescue Squad, Inc. (BRS) Corporation voted on a Plan of Dissolution pursuant to Wisconsin Statute 181.1401. The dissolution of BRS will occur effective January 1, 2020 at 12:00 a.m. and as a part of the dissolution, BRS needed to approve a Plan of Dissolution that included transfer and assignments of its remaining assets both financial and equipment / property. This evening staff is seeking approval of the Resolution outlining what equipment/property, including Ambulance Unit #933, the City of Burlington will be receiving as part of the dissolution.

BUDGET/FISCAL IMPACT:

The City will need to pay for the cost and expense to remove the markings and logos on Ambulance Unit 933 in the approximate amount of \$7,600. The remaining equipment/ property will be either placed in the equipment replacement fund and/or the departmental budget for future replacement.

RECOMMENDATION:

Staff recommends approval of the Agreement and Resolution as presented.

TIMING/IMPLEMENTATION:

This item is for discussion at the December 17, 2019 Committee of the Whole meeting, and due to the short timeline of the City assuming Rescue Operations, this item scheduled for final consideration at the December 17, 2019 Common Council meeting.

Attachments

RES 4976(29) BRS Equipment
Dissolution Plan Agreement

RESOLUTION NO. 4976(29)
Introduced by Committee of the Whole

A RESOLUTION APPROVING AN AGREEMENT BETWEEN BURLINGTON RESCUE SQUAD, INC CORPORATION AND THE CITY OF BURLINGTON TO CONVEY EQUIPMENT AND PROPERTY

WHEREAS, at its December 2, 2019 Special Meeting consisting of Gold Badge Members, Active Members of BRS and The Burlington Rotary Club the Corporation voted to approve a Plan of Dissolution by the affirmative vote of its members; and

WHEREAS, the Plan of Dissolution in accordance with Sec. 181.1401 of the Wisconsin Statutes identifies dissolution of the Corporation that includes transfer and assignment of all its remaining assets both equipment/property and financial assets.

WHEREAS, effective January 1, 2020 at 12:00 a.m. the Corporation shall cease to exist; and,

WHEREAS, BRS Corporation has agreed to convey to the City, as a gift and without any consideration required, the items of equipment that are described in Exhibit A of the attached Agreement, hereto attached as "Attachment A".

NOW, THEREFORE, BE IT RESOLVED by the Common Council of the City of Burlington, Racine County and Walworth County, State of Wisconsin, that the City of Burlington shall approve an agreement between the City of Burlington and the Burlington Rescue Squad, Inc. Corporation to convey Ambulance Unit 933 to the City as a gift and items listed in Exhibit A of the attached Agreement.

BE IT FURTHER RESOLVED that the Corporation shall execute and deliver to the City the title documents for the Ambulance so that this conveyance can be registered with the Wisconsin Motor Vehicle Department and prior to its use by the City, the City shall, at its own cost and expense, remove all of the markings and logos on the Ambulance that refer to BRS.

BE IT FURTHER RESOLVED that the City Administrator is hereby authorized and directed to execute this agreement on behalf of the City.

BE IT FURTHER RESOLVED that the City Clerk is directed to send a copy of this resolution to Burlington Rescue Squad, Inc., 432 Milwaukee Avenue, P.O. Box 700, Burlington, WI, 53105.

Introduced: December 17, 2019
Adopted: December 17, 2019

Jeannie Hefty, Mayor

Attest:

Diahn C. Halbach Clerk

AGREEMENT

This agreement (“Agreement”) between the Burlington Rescue Squad, Inc. (“Corporation”) and the City of Burlington (“City”) is made this 17 day of December, 2019.

WHEREAS, at its December 2, 2019 Special Meeting consisting of Gold Badge Members, Active Members of BRS and The Burlington Rotary Club the Corporation voted to approve a Plan of Dissolution by the affirmative vote of its members.

WHEREAS, the Plan of Dissolution in accordance with Sec. 181.1401 of the Wisconsin Statutes identifies dissolution of the Corporation that includes transfer and assignment of all its remaining assets both equipment/property and financial assets.

WHEREAS, effective January 1, 2020 at 12:00 a.m. the Corporation shall cease to exist;

WHEREAS, the Corporation will be distributing to the City of Burlington who will assume Rescue Services for the greater Burlington community, the equipment/property outlined in EXHIBIT A as Recipient the City of Burlington

NOW, THEREFORE, the undersigned agree as follows:

1. BRS shall, and hereby does, convey to the City the following equipment/ property identified in EXHIBIT “A” as a gift and without any consideration required. The Corp. shall execute and deliver to the City the title documents for the Ambulance so that this conveyance can be registered with the Wisconsin Motor Vehicle Department.

2. As soon as it possibly can, the City shall, at its own cost and expense, remove all of the markings and logos on the Ambulance Unit # 933 outlined in EXHIBIT “A” that refer to BRS.

4. With great appreciation, the City hereby accepts the Ambulance Unit #933 and Equipment/Property from the Corp.

BRS:
Burlington Rescue Squad, Inc.

CITY:
City of Burlington, Wisconsin

By: _____
Lester O. Mastalir II
Treasurer

By: _____
Jeannie Hefty
Mayor

Attest: _____
Diahnn Halbach
City Clerk

EXHIBIT A

BURLINGTON RESCUE SQUAD

<u>EQUIPMENT</u>	<u>RECIPIENT</u>
1. Heavy Rescue 930/frailer/UTV	Town of Burlington
2. Unit 932 except #7 and #23	Birnamwood Area Emergency Services
3. Unit 933 as is	City of Burlington
4. Pagers/Chargers	City of Burlington/Town of Burlington - 50% each
5. Surface Computers	City of Burlington- 2 Village of Rochester - 2
6. Toughbook Computer	Destroyed
7. Autopulse Device	City of Burlington/ Village of Rochester
8. Single Band Radios/Chargers	Burlington High School BHS I & City of Burlington
9. Tri-Channel Multi-Band Radios/Chargers	City of Burlington Village of Rochester
10. Tum-out Gear	St. Francis Paramedic Program and any remaining to the City of Burlington
11. Office Computer/Monitor	Town of Lyons
12. Office Filing Cabinets	City of Burlington
13. Office Desks	City of Burlington
14. Office Copier/Copier Stand	Kansasville Fire and Rescue Volunteer Fire Dept.
15. Poly Tables	City of Burlington

16. Washing Machine/Dryer City of Burlington
17. Red/Blue Wall Racking City of Burlington
18. Rescue Task Force (RTF) Gear City of Burlington
19. O2 Cylinders - not owned by Welders Supply City of Burlington
20. Philips Heart Start Monitor Kansasville Fire and Rescue Volunteer Fire Dept.
21. Supply Room Contents City of Burlington
22. Resource Room Contents includes refrigerator City of Burlington
23. Nitrous Oxide System (from 932) desired City of Burlington and if not to the Village of Rochester
24. Clothing City of Burlington
25. Lights & Sirens BRS to pay for removal (Invoice for removal must be supplied to BRS by March 31, 2020)



DATE: December 17, 2019

SUBJECT: RESOLUTION 4977(30) - To consider approving an amendment to the City of Burlington Fee Schedule.

SUBMITTED BY: Megan Watkins, Assistant City Administrator | Zoning Administrator

BACKGROUND/HISTORY:

As a part of best practices, in conjunction with the approval of the Annual Budget, the Common Council should also approve the fee schedule.

The City maintains an official fee schedule that encapsulates all fees among the various city departments. This fee schedule was last updated on March 6, 2018. In an effort to be fiscally responsible with services provided, as well as cognizant of trends among comparable communities, staff analyzed this schedule to remain consistent with other municipalities, while maintaining reasonable fees for our patrons. The current fees that were amended are incorporated with the proposed changes (in red) on the attached fee schedule. Several fees were amended as highlighted below:

Ch. 115 – Building Construction

- The inclusion of remodel projects
- The inclusion of egress windows
- Addition of a final grade and landscaping bond
- Addition of foundation repair/drain tile
- Addition of parking lot alterations and additions
- Addition of heat pumps and gas piping

Ch. 155 – Fire Prevention and Control

- Entire Fire Department fee schedule adopted in 2008 as part of Resolution 4275(45) added to the City of Burlington fee schedule
- Added Ambulance Service fees

Ch. 243 – Plumbing

- Added lawn sprinklers and wells

Ch. 259 – Sewers

- Added holding tanks

Ch. 274 – Streets and Sidewalks

- Increased right-of-way permit fee

Ch. 278 – Subdivision of Land

- Added final grade recertification bond

BUDGET/FISCAL IMPACT:

As a matter of best practices, fees associated with the official Fee Schedule should be renewed and evaluated yearly.

RECOMMENDATION:

Staff recommends approval of the revisions to the City of Burlington Fee Schedule.

TIMING/IMPLEMENTATION:

This item is for discussion at the December 17, 2019 Committee of the Whole meeting, and is scheduled for final consideration at the same evening Common Council meeting.

Attachments

RES 4977(30) Fee Schedule Amendment
Fee Schedule_RedLined

**A RESOLUTION AMENDING THE FEE SCHEDULE
FOR THE CITY OF BURLINGTON**

WHEREAS the City of Burlington issues permits and licenses and performs other reviews, inspections and services as provided in its Municipal Code; and

WHEREAS the City defrays its costs of administration, investigation, and processing of said services by imposing fees; and

WHEREAS the City wishes to assemble all of said fees in a centralized document for convenience and economy of administration:

NOW, THEREFORE, BE IT RESOLVED by the City of Burlington Common Council, that, pursuant to all of the above, the City of Burlington Fee Schedule attached hereto is approved and adopted in its entirety.

BE IT FURTHER RESOLVED that the Fee Schedule shall be kept on file in the office of the City Clerk.

Introduced: December 17, 2019
Adopted:

Jeannie Hefty, Mayor

Attest:

Diahnn Halbach, City Clerk



City of Burlington Fee Schedule

Revised 12/2019

Ch. 9 Budget and Finance

Special Assessment or other status letter \$35

Ch. 22 Departments

Fingerprint Fee \$20

Ch. 31 Emergency Government

Vehicle Storage Fee \$10/day or portion thereof

Ch. 67 Records

Photocopies (letter or legal size, copied on site)	\$0.25 per page
Other reproductions or photography	Actual cost
Audio Tape	\$15
Compact Disc/DVD	\$10
Video Tape	\$20
Search fees if in excess of \$50.00	Hourly pay rate of lowest paid employee capable of performing the search
Mailing	Actual cost
Frequently asked for documents	
Entire Municipal Code	Actual cost charged by code co.
Municipal Code Supplements (Ordinances)	\$0.25 per page printed
Zoning Code	\$20
Fire Prevention Code	\$20
Zoning Map	\$15
Voting Map	\$15
24" x 36" prints	\$3.75 each

Ch. 100 Amusements and Special Events

Circus or Caravan License	\$30 per day
Show, Event or Amusement License	\$25 per day
Block Party Permit	Actual cost per man hour for city services
Special Event Permit	Actual cost per man hour and items requested for City services and processing fees

Ch. 104 Animals

Special Permit	\$10
Dog/Cat - Spayed/Neutered	\$6
Dog/Cat - Not Spayed/Neutered	\$10
Late Fee	\$10 after April 1 or 8 months old within year
First Impoundment	\$15
Second Impoundment	\$25
Third Impoundment	\$40
Commercial License	\$15

Ch. 110 Bicycles and Play Vehicles

Bicycle Registration	No charge - Valid for life of bicycle
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Ch. 115 Building Construction

1 and 2 Family Dwelling

Minimum Permit Fee for All Building Permits	\$65
Early Start	\$200
Plan Review	\$175
Zoning	\$75
Erosion Control	\$150
New 1 & 2 Family (including decks)	\$0.32/ sq. ft.
State Seal	\$50
Occupancy	\$65
Temporary Occupancy	\$80
911 Address number	\$15
<u>Remodel</u> , Additions + Mechanicals	\$0.32/ sq. ft. Min. \$190
Plan Review	\$100
Certificate of Completion/occupancy	\$50
<u>Remodel</u> /Basement Finish + Mechanicals	\$0. 32 <u>18</u> / sq. ft. Min. 120 <u>100</u>
Plan Review	\$50
Certificate of Completion	\$25
Add Bath (all trades included)	\$200
Kitchen Remodel (includes all trades)	\$165
Bath Remodel-fixture replacement only (includes all trades)	\$120
Modular Home (includes all trades)	\$800
Accessory Building (†)	
Plan Review & Zoning	\$50
Less than 120 sq. ft. (includes zoning)	\$100
Greater than 120 sq. ft.	\$0.28 sq. ft. Min \$120
Manufacture built (no plan review needed)	\$75
Decks/Gazebo/Pergolas (includes plan review & zoning)	\$150
Exterior Entry Landing/Ramp (Under 25 sq. ft.)	\$85 (Includes plan review)
ADA Ramp Manufactured	\$65
Re-inspection fee	\$75
Where sq. footage cannot be calculated	\$11 per \$1000 of valuation
Raze	\$200 (Fees may be waived at the discretion of the Building Inspector)

Miscellaneous 1 and 2 Family

Permit renewal	\$75/inspection, Min. \$100
Roof/Siding	\$50
Add window/door	\$85/inspection
Foundation Repair/ <u>drain tile</u>	\$120
Fence	\$50
Driveway addition/alteration/relocate	\$50
<u>Egress window</u>	<u>\$85</u>
<u>Final grade & Landscaping Bond</u>	<u>\$2,000</u>

Commercial/Multifamily

Minimum permit fee	\$100
Permit Renewal	\$85/Inspection, Min. \$200
Early Start	\$245
Plan Review	\$250 + \$25/per additional units
Zoning	\$125
Erosion Control	\$180/Building + \$5/1,000 Sq. Ft. Max. \$2,000
New Building	\$0.32/ sq. ft.
Occupancy	\$190 + \$ 50/unit
Temporary Occupancy	\$80
Tenant Finish/Remodel /Addition	\$0.32/ sq. ft., Min. \$200
Plan Review/Zoning	\$225
Certificate of Completion	\$50
Decks/Gazebo/Pergolas (includes plan review & zoning)	\$200
Accessory Structures	\$0.32/ sq. ft., Min. fee \$180
Plan review	\$75
Certificate of completion	\$50/unit
Where Square footage cannot be calculated	\$12/ \$1,000 value of project

Industrial/Manufactory Building

Minimum Permit Fee	\$100
Permit Renewal	\$85/Inspection Min. \$200
Early Start	\$245
Plan Review	\$225
Plan Review (<\$40,000)	\$125
Zoning	\$125
Erosion Control	\$180/Building + \$5/1000 Sq. Ft.
New Building (not including office/lab or similar area)	\$0.26/ sq. ft.
Office/Lab or similar area	\$0.32/ sq. ft.
Occupancy	\$190
Temporary Occupancy	\$190
Remodel/Addition (not including office/lab or similar area)	\$0.26/ sq. ft.
Office/Lab or similar areas	\$0.32/ sq. ft.
Plan review	\$100
Certificate of Compliance	\$50/unit

Miscellaneous Commercial/Multifamily/Industrial/Manufactory Fees

Minimum Permit Fee	\$65
Re-inspection Fee	\$75 1st time/100 each time after
Missed inspections	\$75
Work Started without permits	Double Fee
Special Inspection, Reports or Letter	\$75/hr.

Cellular Tower Modification	\$120
Cellular Tower Installation – New	\$750
Cold Storage + Mechanicals	\$0.26 sf. ft.
Wrecking, Razing or Demolition	\$75 + \$0.10/sq. ft. / Max. \$750/building (Fees may be waived at the discretion of the Building Inspector)
<u>Foundation Repair/drain tile</u>	<u>\$220</u>
<u>Re-Roof</u>	\$11/\$1,000 value of project / Max. \$250
Siding	\$100
Fence (include zoning)	\$50
Driveway	\$50
Pools/Hot tub above ground (include zoning) + Mechanicals	\$120 (includes 2 inspections)
Pools built-in (include zoning) + Mechanicals	\$180 (includes 3 inspections), \$65 each additional inspection
Signs/Awning (each)	\$65
Temporary Sign Permit	\$65
Dumpster / Receptacle Enclosure Permit	\$65
Yard Sprinkler System	\$65
<u>Final grade & Landscaping Bond</u>	<u>\$5,000</u>
<u>Parking lot alteration/addition</u>	<u>\$300</u>

- Note: The state fee schedule for commercial buildings (DSPS 305) projects may be charged in lieu of or in addition to this fee schedule at the Municipalities discretion
- Note: Gross square footage calculations are based on exterior dimensions, including garage and each finished floor level. Unfinished basements or portions thereof are not included
- Note: The state fee schedule for commercial building projects may be charged in lieu of or in addition to this fee schedule at the City's discretion.
- Note: All fee categories shall be rounded up to the next full dollar amount.
- Note: Where fees are based upon square footage, they shall be based on exterior dimensions, including garage and each unfinished floor level. Unfinished basements or portions thereof are not included.

Ch. 115 Heating and Air Conditioning

Plan Review if not submitted at time of original review	\$65
Minimum Permit fee	\$65
New 1 and 2 Family Residential	\$ 60 base fee + .07/ sq. ft.
Addition	\$ 60 base fee + .07/ sq. Ft.
Remodel (duct alteration only)	\$ 65
HVAC Appliance replace/added + electrical	\$ 65 each
Commercial/Multi Family	
New/Addition/Remodel	\$100 base fee + \$.06/ sq. ft.
Minimum permit fee	\$100
Where sq. ft. cannot be calculated	\$85/inspection
Industrial/Manufactory	
New/Addition/Remodel	\$100 base fee+ \$0.04 sq. ft.
Minimum permit fee	\$100

Where sq. ft. cannot be calculated \$85/inspection

Commercial/Multi Family/Industrial/Manufactory – Additional or Replace Units

Air Conditioning Unit (Up to 3 tons or 36,000 BTUs) \$100/unit
Air Conditioning Unit (Over 3 tons) \$16/ton (12,000 BTUs) or fraction
Thereof, Max. \$750/unit
Exhaust Hood System (New/ Replace) \$200
Heating & Air Conditioning Distribution System \$0.04/ sq. ft. of conditioned area.
Min. \$100
Heating, Incinerator Unit or Wood Burning Appliance
(Up to & including 150,000 BTUs) \$65/unit
Heating, Incinerator Unit or Wood Burning Appliance
(Over 150,000 BTUs) \$16/unit per 50,000 BTUs or
fraction thereof, Max. \$750/unit
Heat pumps \$65/each
Gas piping \$25/appliance

Ch. 128 Cigarettes and Tobacco Products

Cigarette License \$100

Ch. 142 Electrical Work / Inspections

1 and 2 Family Dwelling

Minimum permit fee \$65
New /Remodel/Addition \$60 base + \$0.10/ sq. ft.
Where Sq. Ft. cannot be calculated \$65 + \$3 / device
Accessory Building \$60 base fee +\$0.10/ sq. ft.

Multi Family/ Commercial

Minimum permit fee \$100
New/Addition/Remodel (plus electric service) \$100 base + \$0.10/ sq. ft.
Where sq. ft. cannot be calculated \$85 + \$4 /device
Plan review if not submitted at time of original review \$65
Where sq. ft. cannot be calculated \$85/inspection

Industrial/Manufactory

Minimum permit fee \$100
New /Addition/ Remodel (plus electric service) \$120 Base fee + \$.08/ sq. ft.
Office/Lab /similar areas \$0.10/ sq. ft.
Where Sq. Ft. cannot be calculated \$85 + \$4/device
Plan review if not submitted at time of original review \$65

Miscellaneous Fees

Special Inspections \$85
New/Temporary/Upgrade service
Feeder panel \$65
0 to 200 amp \$100
201- 400 amp \$120
401 amp and up \$240
Accessory Structure+ electrical service \$65 Base fee + \$ 8/device
Solar/Wind generation \$120
Generators/Transformer \$120

Low Voltage system	\$75 + \$0.02/ sq. ft. <u>or \$75 + \$1/opening</u>
Appliances	\$65
Hot Tubs/pools above ground	\$120
Built in Pools/Hot Tubs	\$180
Parking Lot lighting	\$65 Base fee + \$15/fixture
Pump/Grinders	\$65 /device
Heating Units	\$65 /unit
Sign	\$65
Miscellaneous	\$65

Ch. 155 Fire Prevention, Protection and Control

Bonfire Permit	\$25 per fire
Open Burning Permit	\$25 per year
Blasting Permit	\$100 per project
Fireworks Permit	No fee
High Piled Storage Permits	\$300 per permit*
Change in use or occupancy permit	\$300 per occupancy*
Plan review	\$75

Inspection, review, modification, consulting or witness fee

Acceptance test	\$75
Fire sprinkler/fire control and/or fire suppression system basic Plan review (without hydraulic calculations)	\$250 per system review
Fire sprinkler/fire control and/or fire suppression system basic Plan review (with hydraulic calculations)	\$325 per system review
Verification of additional hydraulic calculations	\$175 each
Verification of additional hydraulic calculations utilizing the Darcy-Weisbach calculation method	\$210 each
Site inspection of fire protection systems during installation	\$75/hour
Witness final acceptance test of fire protection systems	\$75/hour
Modifications to existing sprinkler systems	
Minimum fee without hydraulic calculations	\$100
Up to 15 sprinklers without hydraulic calculations	\$10 per sprinkler
Up to 15 sprinklers with hydraulic calculations	\$325
16 or more sprinklers	\$325
Fire pumps	\$300 per review
Sprinkler system underground mains, including combination mains	
0 to 999 feet	\$150
1,000 feet	\$300
Fire hose and/or standpipe hose connections	\$10/outlet
Other fire protection control and/or fire suppression systems	\$300
Fire alarm systems	\$250 per control panel review
Fire alarm system notification devices (audible and visual), manual pull stations, initiating devices, photoelectric detectors, water flow devices and monitoring devices	\$50 up to three; \$10/additional
Witnesses of all required tests (2 hour min. per test)	\$75/hour
Inspections during installation (2 hour min. per system)	\$75/hour
Fire protection consulting on systems and/or occupancies or permits (2 hour minimum)	\$75/hour
Work commenced without permit	Triple fee charged
*Hourly fire protection consulting fee may also be charged	

Ambulance Service

Basic Life Support (BLS) – resident	\$650
Basic Life Support (BLS) – non-resident	\$750
Advanced Life Support 1 (ALS1) – resident	\$800
Advanced Life Support 1 (ALS1) - non-resident	\$900
Advanced Life Support 2 (ALS2) – resident	\$1000
Advanced Life Support 2 (ALS2) – non- resident	\$1100
Mileage – resident	\$16
Mileage – non-resident	\$16.50
Oxygen	\$65
Spinal immobilization	\$150
BLS on scene care – resident	\$200
BLS on scene care – non-resident	\$200
ALS on scene care – resident	\$450
ALS on scene care – non-resident	\$500
Billable supplies	Based on market rates

Ch. 165 Geographical Designation and Logo

Use of Geographical Designation and Logo	\$110
Use of Logo Only	\$30

Ch. 187 Intoxicating Liquor/Fermented Malt Beverages

Retail Class "A" Fermented Malt Beverages	\$100 Plus publication charge 187-7
Retail Class "B" Fermented Malt Beverages	
Full Year	\$100 Plus publication charge
Six Month	\$50 Plus publication charge
Temporary/Picnic (Special Gathering)	\$10
Wholesaler's Ferm. Malt. Bev.	\$25 Plus publication charge
Retail "Class A" Liquor	\$500 Plus publication charge
"Class B" Liquor	
Full Year	\$500 Plus publication charge
Six Months	\$250 Plus publication charge
Operator's	\$25
Provisional Operator's	\$15
Temporary Operator's	\$10
Retail "Class C" (Wine)	\$100 Plus publication charge
Retail Reserve "Class B" Liquor	No less than \$10,000 plus publication charge

Ch. 193 Junk Collectors / Dealers

Junk Collector	\$25
Junk Dealer	\$25
Junk Yard	\$25
Each Additional Vehicle	\$15
Duplicate License	\$5

Ch. 219 Noise

Construction Equip. Operation	\$125 for operation outside of
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Loudspeaker Permit regular hours
\$30

Ch. 227 Public Nuisance

Noxious and other weeds \$110.00 Administration fee, plus
equipment cost, and hourly labor
(doubled)

Ch. 234 Parks and Public Areas

Special Occasion Permit \$15
 Overnight Camping Permit \$15
 Pavilion Rental for City residents \$50
 Pavilion Rental for non-residents \$100
 Park rental security deposit \$100

Ch. 243 Plumbing

New 1 and 2 Family \$60 base fee + \$.10/ sq. ft.
 Addition/Remodel \$ 15 per fixture
+\$65 per inspection,
Minimum \$125

Lawn sprinkler \$65

Wells \$85

New Commercial/ Multifamily

Plan Review if not submitted at time of original review \$100 base fee + \$0.10/sq. ft.
\$65
 Minimum Permit Fee \$85
 Addition/Remodel \$15/fixture + \$85/ anticipated
inspections, min. fee \$ 225
 Sanitary & Storm Sewer Building Drain \$75 for 1st. 100 ft. + \$0.45/ea.
additional ft.
 Water, Sanitary & Storm Sewer Laterals \$75 for 1st 100 ft. + \$0.45/ea.
additional ft.
 Sanitary & Storm Sewer \$75 for 1st. 100 ft. + \$0.45/ea.
additional ft.
 Manhole & Catch Basin \$15/each
 Back Flow Preventers \$120

New Manufactory/Industrial

Plan Review if not submitted at time of original review \$100 Base fee + \$0.06/sq. ft.
\$65
 Minimum Permit Fee \$85
 Addition/Remodel \$15/fixture + \$85/ anticipated
inspections, min. fee \$ 225
 Sanitary & Storm Sewer Building Drain \$75 for 1st. 100 ft. + \$0.45/ea.
additional ft.
 Water, Sanitary & Storm Sewer Laterals \$75 for 1st 100 ft. + \$0.45/ea.
additional ft.
 Sanitary & Storm Sewer \$75 for 1st. 100 ft. + \$0.45/ea.
additional ft.
 Manhole & Catch Basin \$15/each
 Back Flow Preventers \$120

Miscellaneous Commercial/Industrial

<u>Gas piping</u>	<u>\$25/appliance</u>
<u>Lawn sprinkler</u>	<u>\$85/building connection</u>
<u>Wells</u>	<u>\$85</u>

Ch. 254 Sales

Direct Seller's Registration	\$50
Weights and Measures License	\$30
Annual Assessment	Amount set by Council according to class of license
Vendor Vehicle Permit	
Pushed, Pedaled or Pulled Vehicle	\$20
Motorized Vehicle	\$30
Mobile Food Vendor Permit	\$250
Farmer's Market Permit	Handled by Farmers Market
Special Event Sales Permit	\$30

Ch. 259 Sewers

Sewer Connection Fee, within City	\$1,650 per REU
<u>Holding tanks</u>	<u>\$85</u>
Industrial Discharge Permit	\$110
Septage Disposal Permit	\$110

Ch. 270 Stormwater Management

Stormwater Permit	Actual cost of City Engineer's charges
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Ch. 274 Streets and Sidewalks

Snow and Ice Removal	\$110 Administration fee, plus equipment cost, and hourly labor (doubled)
Outdoor Seating Permit B2 & B2A Zoning Dist.	
Sidewalk Seating Permit without alcohol	\$30
Sidewalk Seating Permit with alcohol	\$45
Right-of-way Work	Deposit \$2,000.00 Refundable on satisfactory restoration
Right-of-way Permit	
Excavation below 12" deep or pavement	<u>\$175 \$200 Deposit +/- Actual</u>
Surface or above 12" below surface	\$30
Dumpster or construction vehicle placement	\$30

Ch. 278 Subdivision of Land

<u>Final Grade Recertification Bond</u>	<u>\$5,000</u>
Objecting Agency Review Fee	Actual cost charged by Agency
Preliminary Plat/CSM Review	\$35 Base fee, plus \$7 per lot
Reapplication	\$30
Improvement Review Fee	1% of estimated cost of public

Inspection Fee	Improvements Actual cost of City Engineer's Charges
Final Plat/CSM Review Reapplication	\$8 Base fee, plus \$2 per lot \$8
Public Site Fee	\$500 per dwelling unit
Street Tree Fee	\$135 per tree required
Engineering Fee	Actual cost of City Engineer's charges
Administrative Fee	Actual cost of City's expenses

Ch. 293 Vehicles and Traffic

All Night Parking Permit	\$10 per month
Parking Permit for Municipal Lot	\$10 per month
Key Return Fee	\$5
Impoundment Storage Fee	\$50 per day or portion thereof

Ch. 297 Vehicles for Hire

Taxicab License	
First vehicle	\$60 plus publication charge
Each additional vehicle	\$30
Carriage License	\$30 per carriage

Ch. 304 Water

Flow Tests	\$10
Water Rates	As approved by the PSC & Council in Rate Schedule
Well Operation Permit	\$75 permit must be renewed every five years

Ch. 315 Zoning

PUD Overlay District	\$500 Deposit +/- Actual
Conditional Use Permit	\$500 Deposit +/- Actual
Certified Survey Map Review	\$500 Deposit +/- Actual
Site Plan Review	\$500 Deposit +/- Actual
Rezoning/change Application	\$500 Deposit +/- Actual
Historic Preservation District Certificate of Appropriateness	\$150 Deposit +/- Actual
Historic Preservation District Sign Application	\$150 Deposit +/- Actual
Variance Application/Zoning Appeal	\$150 Deposit +/- Actual
Quarry Operation Cond. Use	\$200 per year



DATE: December 17, 2019

SUBJECT: ORDINANCE 2054(20) - To approve Repealing and Recreating the Provisions of Chapter 67-10 of the Municipal Code for the City of Burlington regarding Destruction of Records and to Adopt and Replace with the State of Wisconsin Municipal Records Schedule (WMRS).

SUBMITTED BY: Diahnn Halbach, City Clerk

BACKGROUND/HISTORY:

The Wisconsin Municipal Records Schedule (WMRS) is an adoptable general schedule, approved by the Wisconsin Public Records Board (August 2018), that can be used by Wisconsin municipalities for the administration and disposition of public records. Municipalities are not required to adopt the WMRS; however, the schedule must be adopted before any municipality can utilize the schedule for their records.

The WMRS is an updated version of the Wisconsin Municipal Records Manual, commonly referred to as the “Little Orange Book,” that was originally published in 1980. It was used only as a reference guide for municipalities when drafting their own ordinances for records management, which required approval from the Public Records Board (PRB). Adopting the WMRS schedule in its entirety, eliminates this step.

The purpose of a General Record Schedule is to:

- Provide agencies with uniform guidelines for the retention and disposition of records common to a business function.
- Ensure that agencies retain records as long as needed in order to complete the transaction of business on behalf of the State of Wisconsin, and to meet legal, audit, archival, and other State of Wisconsin and federal requirements.
- Provide agencies with legal authorization to dispose of records eligible for disposition on a regularly scheduled basis after the minimum retention periods are met. Records may not be disposed of in a shorter period of time.
- Promote the cost-effective management of records.

The last update to the City of Burlington's Record Schedule Policy was December 19, 2000, per Ordinance 1646(50) and is not organized in an efficient, easy to read format. Whereas the WMRS schedule is well organized and includes a column that easily identifies whether the Wisconsin Historical Society (WHS) requires notification before the destruction of any records. All municipalities are required per Wis. Stat. § 19.21(4)(a) to notify the WHS prior to the destruction of any public records. However, municipalities who adopt the schedule may destroy the identified record series without providing written notification.

The WMRS schedule allows better use of records management and streamlines departmental efficiencies as to what records need to be retained and for how long. Adopting the WMRS schedule also gives municipalities the ability to opt into a pre-approved retention schedule rather than having to draft their own schedule and possibly submit for PRB approval.

BUDGET/FISCAL IMPACT:

N/A

RECOMMENDATION:

Staff recommends approval of the adoption of the General Records Schedule.

TIMING/IMPLEMENTATION:

This item is for discussion at the December 17, 2019 Committee of the Whole meeting, and is scheduled for final consideration at the January 7, 2020 Common Council meeting.

Attachments

Ord 2054(20) Adoption of the WMRS Schedule

Ord 1646(50) Records_RED LINED

Letter to State & Approved Application

General Records Schedule

AN ORDINANCE REPEALING AND RECREATING THE PROVISIONS OF CHAPTER 67-10 OF THE MUNICIPAL CODE FOR THE CITY OF BURLINGTON REGARDING DESTRUCTION OF RECORDS AND TO ADOPT AND REPLACE WITH THE STATE OF WISCONSIN MUNICIPAL RECORDS SCHEDULE (WMRS).

NOW THEREFORE IT BE RESOLVED that the Common Council of the City of Burlington, Racine County, Wisconsin does hereby ordain as follows:

Part I. Purpose. The purpose of this ordinance is to repeal Chapter 67-10 of the Municipal Code effective within the City of Burlington relating to the retention of public records and destruction of obsolete public records.

Part II. Chapter 67-10 Repealed and Recreated. The provisions of Chapter 67-10 of the City of Burlington Municipal Code are repealed and recreated as follows:

Chapter 67-10. Records Retention and Destruction.

67-10. The City of Burlington hereby adopts and incorporates herein the General Records Schedule for Wisconsin Municipal and Related Records approved by the Wisconsin Public Records Board on August 27, 2018.

Part III. Effective Date. This ordinance shall take effect and be enforced after publication and posting as required by law.

Introduced: December 17, 2019
Adopted:

Jeannie Hefty, Mayor

Attest:

Diahn Halbach, City Clerk

Ordinance No. 1646(50)
Introduced by: Committee of the Whole

**AN ORDINANCE CREATING SECTION 1.40, AN OPEN RECORDS POLICY
FOR THE CITY OF BURLINGTON**

The common council of the city of Burlington do ordain as follows:

Section 1. Section 1.40 of the Burlington municipal code is created as follows:

1.40 PUBLIC RECORDS

1. Legal Custodian.

Unless provided below, the city administrator is designated as legal custodian of all records of the city departments, boards, committees and commissions. The following offices or departments shall have as the legal custodian of records the individual so named.

Office or department	Legal Custodian
General City Records (including council)	City Administrator
Fire Department	Fire Chief
Police Department	Chief of Police
Financial Records	City Treasurer
Municipal Library	Librarian
City Attorney's Office	City Attorney
Water/Wastewater Utilities	Utilities Manager

Each legal custodian shall name a person to act as legal custodian in his or her absence or in the absence of his or her designee, and each legal custodian shall send notice of the designated deputy to the city administrator.

2. Policies in writing.

All City offices or departments, boards, committees and commissions that adopt a policy shall do so in writing and shall:

A. Designate a custodian and an alternate to act as a custodian in the absence of the primary custodian.

B. Designate within the written policy the office hours during which a records request may be made.

C. Provide that all such requests shall be made in writing or otherwise reduced to writing.

D. Provide for the payment of fees not inconsistent with this policy.

E. Provide a draft for approval by the City Attorney. No policy or any changes thereto shall be implemented without the approval of the City Attorney.

3. Policy filed.

All City offices or departments that have adopted a policy or that will adopt a policy pursuant to Section 1 shall provide a copy of such policy to the city clerk who shall maintain a policy file and use it to redirect records requests to the appropriate custodian.

4. Requests.

All records requests determined by the custodian to be other than routine shall be directed to the office of the city attorney for review and recommendation.

5. Records requests made to the office of the city administrator shall:

A. Be in writing and be specific as to the information requested.

B. Be made during regular office hours Monday through Friday 8 a.m. to 5 p.m.

C. Be filled within a reasonable time.

6. The clerk's office shall charge the person requesting information the following fees:

A. 50 cents per page to reproduce and fill the request by photocopying.

B. The actual and necessary costs of reproducing engineering drawings, plans and specifications.

C. If necessary to photograph the information the actual necessary and direct cost of photographing.

D. The actual, necessary and direct search fees if they exceed 50 dollars. Search fees shall be charged at the rate of \$17.59 per hour. In the event it is necessary to use non-clerical personnel in the search, their time will be charged at their existing hourly rate plus benefits.

E. The actual, necessary and direct cost of mailing.

F. When the estimated and / or actual charges exceed five dollars, the clerk shall require prepayment.

G. The legal custodian may provide copies of the record without charge or at a reduced charge if he or she determines that waiver or reduction of the fee is in the public interest.

7. Public access to records.

A. Except as provided any person has a right to inspect a record and to make or receive a copy of any record as provided in section 19.35 (1), stats.

B. Records will be available for inspection and copying during all regular office hours.

C. If regular office hours are not maintained at the location records are kept, the custodian will use his / her best efforts to have records available for inspection and copying upon at least 72 business hours advance notice of intent to inspect or copy.

D. The legal custodian may require supervision during inspection or may impose other reasonable restrictions on the manner of access to an original record if the record is irreplaceable or easily damaged.

E. Pursuant to section 19.34, stats. and the guidelines therein listed, each department, board, committee or commission shall adopt, prominently display and make available for inspection and copying at its offices, for the guidance of the public, a notice containing a description of its organization and the established times and places at which, the legal custodian from whom, and the methods whereby, the public may obtain information and access to records in its custody, make requests for records, or obtain copies of records, and the cost thereof. This subsection does not apply to members of the common council.

8. Limitations on right to access.

A. As provided in section 19.36, stats, the following records are exempt from inspection under this chapter:

i. Records specifically exempted from disclosure by state or federal law or authorized the exempted from disclosure by state law;

ii. Any record relating to investigative information obtained for law enforcement purposes in federal law or regulations require exemption from

disclosure or if exemption from disclosure is a condition to receipt of aids by the state;

iii. Computer programs and files, although the material used as input for a computer program/file or the material produced as a product of the computer program is subject to inspection;

iv. Pursuant to section 905.08, stats., a record or any portion of record containing information qualifying as a common-law trade secret. "Trade secrets" are defined as on patented, secret, commercially valuable land, appliances, formulas or processes which are used for making, preparing, compounding, treating or processing articles, materials or information which are obtained from a person which are generally recognized as confidential.

B. As provided by section 43.30, stats, public library circulation records are exempt from inspection under this section.

C. In responding to a request for inspection or copying a record which is not specifically exempt from disclosure, the legal custodian, after conferring with the city attorney, may deny the request, in whole or in part, only if he or she determines that the harm to the public interest resulting from disclosure would outweigh the public interest in full access to the requested record. Examples of matters for which disclosure may be refused include, but are not limited to, the following:

i. Records obtained under official pledges of confidentiality which were necessary and given in order to obtain the information contained in them.

ii. Pursuant to section 19.85 (1) (a), stats, records of current deliberations after a quasi judicial hearing.

iii. Pursuant to section 19.85 (1) (b) and (c) records of current deliberations concerning employment, dismissal, promotion, demotion, compensation, performance, or discipline of any city officer or employee, or the investigation of charges against the city officer or employee, unless such officer or employee consents to such disclosure.

iv. Pursuant to 19.85 (1) (D.), stats, records concerning current strategy for crime detection or prevention.

v. Pursuant to section 19.85 (1) (D.), stats., records of current deliberations or negotiations on the purchase of city property, investing of city funds, or other city business whenever competitive or bargaining reasons require nondisclosure.

vi. Pursuant to section 19.85 (1) (F.) Stats, financial, medical, social or personal histories or disciplinary data of specific persons which, if disclosed,

would be likely to have a substantial adverse effect upon the reputation of any person referred to in such history or data.

vii. Pursuant to section 19.85 (1) (G.), stats., communications between legal counsel for the city and any officer, agent or employee of the City, when advice is being rendered concerning strategy with respect current litigation in which the city or any of its officers, agents or employees is or is likely to become involved, or communications which are privileged under section 905.03 stats.

viii. Pursuant to section 19.85 (1) (8), stats, requests for confidential written advice from an ethics board, and records of advice given by such ethics board on such request.

D. If a record contains information that may be made public and information that may not be made public, the custodian of record shall provide the information that may be made public and delete the information that may not be made public from the record before release. The custodian shall confer with the city attorney prior to releasing any such record and shall follow the guidance of the city attorney when separating out the exempt material. If, in the judgment of the custodian and the city attorney, there's no feasible way to separate the exempt material from the nonexempt material without unreasonably jeopardizing nondisclosure of the exempt material the entire record shall be withheld from disclosure.

9. Duty to maintain records.

A. Except as provided under section 10 below, each officer and employee of the city shall safely keep and preserve all records received from his or her predecessor or other persons and required by law to be filed, deposited or kept in his or her office of which are in lawful possession or control of the officer or employee or his or her deputies, or to the possession or control of what he or she or they may be lawfully entitled as such officers or employees.

B. Upon expiration of an officer's term of office or an employee's term of employment, or whenever the office or position of employment becomes vacant, each such officer or employee shall deliver to his or her successor all records then in his or her custody and the successor shall receipt therefor to the officer or employee, who shall file the receipt with the city administrator. If a vacancy occurs before a successor is selected or qualified, such record shall be delivered to and receipted for by the administrator, on behalf of the successor, to be delivered to such successor upon the latter's receipt.

10. ~~Destruction of records~~Record Retention and Destruction.

The City of Burlington hereby adopts and incorporates herein the General Records Schedule for Wisconsin Municipal and Related Records approved by the Wisconsin Public Records Board on August 27, 2018.

Section 3. Effective Date. This ordinance shall take effect and be enforced from and after publication and posting as required by law.

~~A. City officers may destroy the following nonutility financial records of which they are the legal custodian and which are considered obsolete, after completion of any required audit by the bureau of municipal audit or an auditor licensed under chapter 442 of the Wisconsin statutes, but not less than seven years after payment or receipt of any sum involved in a particular transaction, unless the shorter period has been fixed by the State Public Records Board pursuant to section 16.61—(3) (E.). stats and then after such shorter period:~~

- ~~i. Bank statements, deposit books, slips and stubs.~~
- ~~ii. Bonds and coupons after maturity.~~
- ~~iii. Canceled checks, duplicates and check stubs.~~
- ~~iv. Licensed and permit applications, stubs and duplicates.~~
- ~~v. Payrolls another time and employment records of personnel included under the Wisconsin retirement fund.~~
- ~~vi. Receipt forms.~~
- ~~vii. Special assessment records.~~
- ~~viii. Vouchers, requisition, purchase orders and all other supporting documents pertaining thereto.~~

~~B. City officers may destroy the following utility records of which they are the legal custodian and which are considered obsolete after completion of any required audit by the bureau municipal audit or an auditor licensed under chapter 442 of the Wisconsin statutes, subject to State Public Service Commission regulations, but not less than seven years after the record was effective unless a shorter period has been fixed by the State Public Records Board pursuant to section 16.61 (3) (E.), stats, and then after such shorter period, except that water stubs, receipts of current billings and customers ledgers may be destroyed not less than two years after payment or receipt of the sum involved or the effective date of the record:~~

- ~~i. Contracts and papers relating thereto;~~
- ~~ii. Excavation permits;~~
- ~~iii. Inspection records.~~

~~C. City officers may destroy the following records of which they are the legal custodian and which are considered obsolete, but not less than seven years after the record was effective unless another period has been set by statute, and then after such a period, or unless a shorter period has been fixed by the State Public Records Board pursuant to section 16.61 (3) (e), stats., and then after such a shorter period:~~

- ~~i. Contracts and papers relating thereto;~~
- ~~ii. Correspondence and communication;~~
- ~~iii. Financial records other than annual financial reports;~~
- ~~iv. Justice Dockets;~~
- ~~v. Oaths of office;~~

- ~~vi. Reports of board, commissions, committees and officials duplicated in the common council proceedings;~~
- ~~vii. Election notices and proofs of publication;~~
- ~~viii. Canceled voter registration cards;~~
- ~~ix. Official bonds;~~
- ~~x. Police records other than investigative records;~~
- ~~xi. Resolutions and petitions, providing the text of the same appears in the official city minutes.~~

~~D. Notwithstanding the above provisions appearing in this section, it is intended hereby that election materials may be destroyed according to lesser time schedules as made and provided in section 7.23, stats.~~

~~E. Unless notice is waived by the State Historical Society, at least 60 days notice shall be given the State Historical Society prior to the destruction of any records as provided by section 19.21 (4) (a), stats.~~

~~F. Any tape recordings of a governmental meeting of the city may be destroyed, erased or reused no sooner than ninety (90) days after the minutes of the meeting have been approved and published, if the purpose of the recording was to make minutes of the meeting.~~

~~Section 2. All provisions of Burlington municipal code not inconsistent with assortment shall remain in full force and effect.~~

~~Section 3. This ordinance shall take effect from an after its passage and publication as required by law.~~

Introduced:

Adopted:

~~Claude Lois~~Jeannie Hefty, Mayor

Attest: _____
~~Beverly Gill, Clerk~~Diahnn Halbach, City Clerk



COPY

CITY OF BURLINGTON

City Clerk
300 N. Pine Street, Burlington, WI 53105
(262) 342-1161 – (262) 763-3474 fax
www.burlington-wi.gov

Wednesday, September 4, 2019

State Archivist
Wisconsin Historical Society
816 State Street
Madison, WI 53706

RE: Notification of the General Records Schedule Adoption

To whom it may concern,

The City of Burlington is requesting permission to adopt the Wisconsin Municipal Records Schedule for the Retention and Destruction of City Records in its entirety for the purpose of providing the record officers of the City of Burlington with the authority to destroy certain obsolete public records in possession of the City of Burlington in conformance with the Municipal Records Schedule (WMRS), approved by the State of Wisconsin Public Records Board on August 27, 2018 and set to expire August 27, 2028; and when the record is not contained within the WMRS, in conformance with the Public Records Board other General Records Schedule (GRS) and their successor schedules.

Sincerely,

Diahnn Halbach
City Clerk
City of Burlington
Racine and Walworth Counties

Enclosure: Notification of General Records Schedule Adoption

CC: City Administrator, Carina Walters

Notification of General Records Schedule Adoption

Schedule Title: City of Burlington Records Schedule for the Retention and Destruction of City Records Date: August 9, 2019

Instructions: Adopting WMRS - ASB

Complete and send the original and 2 copies to: State Archivist, Wisconsin Historical Society (WHS), 816 State St., Madison, WI 53706.

- Do not opt out of a record series because your agency does not create or use these types of records. Signing the form does not obligate an agency to create records. It only requires that records be retained in accordance with the retention time periods and dispositions if such records exist. See the Introduction to General Records Schedules for more information.
- Attach a brief narrative explaining your rationale for opting out of each record series. When a separate schedule is prepared, identify that the record series is in lieu of the general schedule and cross reference the specific series.

NOTE: Destruction or transfer of records is not permitted until this form is signed by the WHS and the Public Records Board.

Wisconsin Government Agency: CITY OF BURLINGTON

Address: 300 NORTH PINE STREET, BURLINGTON, WI 53105

This is to notify the Wisconsin Historical Society and the Public Records Board that the agency named above has reviewed the general records schedule and taken the following action (check appropriate box):

- Opt In: We adopt the entire schedule. (Available for University of Wisconsin [UW] System and Local Units of Government)
- Opt In With Revisions: We opt (out of), (in to), (circle one) the following record series. (Available for UW System and Local Units of Government) List the specific retention schedule numbers and titles:
- _____
- _____
- Opt Out: We opt out of the general records schedule (in whole), (in part), (circle one). (Available for State Agencies) **(All applicable records disposition must cease until separate retention schedules are developed and approved by the Public Records Board.)** List the specific retention schedule numbers and titles:
- _____
- _____

Agency Head/Deputy Signature <i>Carina G. Watten</i>	Date Signed <i>9-4-19</i>
Agency Records Officer Signature <i>Quinn Hallback</i>	Date Signed <i>9-4-19</i>

The Public Records Board and Wisconsin Historical Society acknowledge your Notification of Adoption. You are hereby authorized to retain, transfer, and dispose of records as indicated on the schedule.

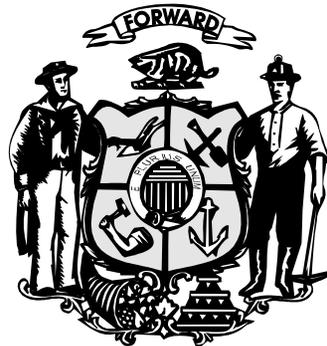
State Archivist Signature <i>Matt Blumig</i>	Date Signed <i>10/3/19</i>
PRB Executive Secretary Signature <i>Tom Brennan</i>	Date Signed <i>10/9/19</i>

General Records Schedule

Wisconsin Municipal and Related Records

Approved by the Public Records Board:

August 27, 2018



Expiration: August 27, 2028

For use by all units of Wisconsin Government at the Municipal level

Wisconsin Municipal Records Schedule

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Introduction:

Records are a basic tool of transacting business on behalf of all local government units. They are the foundation for government accountability. Records management is regulated by Wisconsin state law, and accordingly, the Wisconsin Municipal Records Schedule (WMRS), upon adoption, provides legal authorization to dispose of records on a regularly scheduled basis. The schedule serves as a mechanism for consistent retention and disposition of similar types of records across all municipal governments and provides assurance of accountability to the public.

The schedule was developed following guidelines for complying with legal, fiscal, and archival requirements for records retention and facilitates cost-effective management of records commonly found in municipal governments.

Wisconsin Statute § 19.21(1) defines public records as “all property and things received from the officer’s predecessor or other persons and required by law to be filed, deposited, or kept in the officer’s office, or which are in the lawful possession or control of the officer or the officer’s deputies.” Records are defined by Wisconsin Statute § 19.32(2) as “any material on which written, drawn, printed, spoken, visual, or electromagnetic information or electronically generated or stored data is recorded or preserved, regardless of physical form or characteristics, that has been created or is being kept by an authority.” Public records are also defined as being “all books, papers, maps, photographs, films, recordings, optical discs, electronically formatted documents, or other documentary materials, regardless of physical form or characteristics, made or received by any state agency or its officers or employees in connection with the transaction of public business” (Wis. Stat. § 16.61(2)(b)).

I. Applicability:

This record schedule is available for adoption by all Wisconsin municipal governments. Most municipalities do not create or receive all of the records listed within the WMRS. The inclusion of a schedule in the WMRS does not mean that a local government is responsible for creating those records. Rather, it provides guidance for records that are actually created or received by your particular unit.

Records retention guidelines apply regardless of record format. Records covered by the WMRS may be retained in electronic, paper, or other formats. The schedule applies to all records: born digital (including those created or transmitted via e-mail), data contained in database systems, tapes/cartridges and other types of electronic records and information systems maintained by agencies. Municipalities must also meet the standards and requirements for the management of electronic records outlined in [Chapter Adm. 12](#).

II. Purpose:

Record schedules are intended to be used by records creators as a tool to SIMPLIFY their records management responsibilities, not to make them more complex. It is the intention of the WMRS to streamline municipal records management by:

- Providing clear and uniform guidance for the retention and disposition of records common to most municipal governments;
- Eliminating the need for individual municipalities to develop and obtain Wisconsin Public Records Board approval of records retention/disposition schedules;
- Facilitating uniformity in the retention and disposition of records across all municipalities; and
- Promoting the cost-effective management of municipal records.

III. Implementation:

The WMRS is a schedule that municipalities MAY adopt to manage their records. Municipalities ARE NOT required to adopt the schedule for use. The WMRS does not replace the ability of municipalities to create and adopt records schedules through the creation of ordinances. See Additional Options below for more information.

To adopt the Schedule:

- Submit the [Notification of General Schedules Adoption](#) (PRB-002) form to:
State Archivist
Wisconsin Historical Society
816 State St.
Madison, WI 53706
- The Wisconsin Public Records Board (PRB) will acknowledge your Notification of Adoption by returning a signed copy of the adoption to the municipality.
- After confirmation of PRB approval, municipalities should enact an ordinance adopting the WMRS as their official schedule.

Municipalities are expected to supersede any previously approved, unique, ordinances which cover records included in the adopted Municipal Schedule. Retain any approved schedules in existing ordinances for records that ARE NOT covered by the Municipal Schedule.

Additional Options:

Wis. Stat. § 19.21(4) provides municipalities with the authority to schedule the retention of public records by creating ordinances. Municipalities that choose not to adopt the WMRS are encouraged to use the retention periods provided in the WMRS when creating their own schedules. Any municipality that decides to draft their own schedule must submit that schedule for approval to

the PRB before adopting it as an ordinance. Upon PRB approval, the schedule can be adopted for use by enacting an ordinance. Municipalities may also adopt other [General Records Schedules](#) provided by the PRB.

Municipalities also have the option of adopting separate Records Disposition Authorizations (RDAs) for records that are created specifically by that unit of government. Consult the PRB for more information about the RDA creation process.

IV. Using the Schedule:

The WMRS is arranged in five different sections covering the record series created by municipal governments. Some sections are broken down into subsections to provide easier reference. The following is an example of the format used in each section and an explanation of the information found in each column.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Subsection				

- **Record Series Title** – Descriptive title of the record series. This is a basic title, not necessarily universally used by all municipalities.
- **Series Description** – Brief overview of the records that are included in the record series.
 - If a specific statute or legal source defines a retention period for the records it is identified in this field.
- **Retention** – Indicates the minimum time period a record series must be maintained and a description of what initiates the start of the retention clock.
 - **Creation:** Is used when the creation of the record initiates the retention time period. (*Example:* If a RDA existed for ABC Annual Reports, the event might be written as *Creation+ 3 years* meaning an ABC Annual Report must be retained for three years after it is created.)
 - **Fiscal:** Is used if the retention time period is initiated by the end of a fiscal year. (*Example:* RDAs that exist for annual budgets might be written as *Fiscal+ 6 years* meaning a budget would have to be retained for six years after the end of that fiscal year.)
 - **Event:** Is used if a specific event other than Creation or Fiscal initiates the retention time period. (*Example:* A RDA that exists for a housing relocation program has the event written as *Event+ 5 years; Event=Approval Letter for Relocation Plan*". In this scenario, it means all records associated with this RDA have to be retained for five years after the official letter was sent by the state to approve the relocation plan.)

- **Permanent:** Is used if the records need to be maintained permanently by the creating municipality. See the [Guidelines for the Permanent Retention of Records](#).
- General references on retention periods for municipal records are found in Wis. Stat. § 19.21(4)(b), Wis. Stat. § 19.21(6), or Wis. Stat. § 19.21(8).
- **Confidential** – Indicates whether or not records contain information that is required by statute to be kept confidential. See Section V of this guide for more information on confidential records.
- **WHS Notification** – Wis. Stat. § 19.21(4)(a) requires that all municipal public records must be offered for transfer to the Wisconsin Historical Society 60 days prior to their destruction. This field indicates if notification to the Wisconsin Historical Society is required before records can be destroyed. Column will either state NOTIFY or WAIVED.
 - **Waived:** The Wisconsin Historical Society has determined the record series has low historical value and waived the notification period as indicated Wis. Stat. § 19.21(4)(a). Municipalities are free to destroy any waived records without notification once they reach their required retention period.
 - **Notify:** You are required to send written notification to the Wisconsin Historical Society before destruction. Please contact the Wisconsin Historical Society with questions on how to properly notify on the destruction of public records.
 - **N/A:** indicates that the retention is permanent.

Final Disposition:

Municipal records, which have met the retention time outlined in the WMRS, have only two dispositions: Destroy or transfer to the Wisconsin Historical Society. Records that are held beyond their retention period but are not destroyed are still subject to all public records laws.

- **Destruction:** Records identified as “waived” in this schedule may be destroyed without notifying the Wisconsin Historical Society. Local units should dispose of all public records in a manner that ensures they are completely destroyed.
 - If records contain confidential information, or “information that can be associated with a particular individual through one or more identifiers or other information or circumstances” (Wis. Stat. § 19.62(5) including, but not limited to names, addresses, social security numbers, and banking information it must be destroyed confidentially. This means that these records must be disposed of in a way that renders them unreadable and unable to be reconstructed. Typically, this can be achieved by cross cut shredding or pulping. Many organizations disposing of confidential information choose to hire a vendor to handle the process.
 - **Note on records older than 75 years:** the waived designation does not apply. Notification should be given on any records 75 years or older regardless if they have been indicated in the schedule as having been waived.
- **Transfer:** Records identified as “notify” must be offered, in writing, to the Wisconsin Historical Society. Per Wis. Stat. § 19.23(2), the Wisconsin Historical Society assumes title control and public records responsibility of all transferred records. Obsolete municipal records may not be transferred to local historical societies or other repositories because the statutes do not specify other institutions can hold title to public records. Only the records creators and the Wisconsin Historical Society are identified in statutes as being official holders of title.

- Permanent: Records identified as “permanent” have been identified as containing significant historical information and long term business value. Therefore municipalities are responsible for ensuring the long-term preservation of these records. The Wisconsin Historical Society will, in certain circumstances, accept “permanent” records for transfer if the municipality is unable to maintain these records.

Records that have passed their retention period should not be destroyed if any of the following conditions apply:

- Records are required for financial or performance audits either currently underway or known to be planned.
- Records are subject to a “legal hold” because they may be relevant to an existing, pending, or anticipated legal proceeding.
- A related open records request has been received and not completed, or statutorily required time periods have expired.

V. Confidential Records and Personally Identifiable Information (PII)

Confidential Records:

Some records series may contain confidential or restricted access records. The WMRS identifies any record series containing information required by Wisconsin Statute, administrative rule, or other legal authority to be kept confidential or protected from public access. The confidential column is marked “yes” if ANY records in the series may contain confidential information.

Even when specific confidentiality statutes do not apply, application of substantive common law principles through the balancing test considerations under Wis. Stat. § 19.35(1)(a), may affect disclosure of the record under the public records law.

When an individual or an individual’s representative makes an open records request for records containing personally identifiable information about that individual, there is no balancing test, but the disclosure exceptions under Wis. Stat. §19.35(1)(am), must be considered. Wis. Stat. §19.35(1)(am) exceptions include:

- endangering an individual’s life or safety;
- endangering the security of a prison, including the security of the population or staff;
- identifying a confidential informant; and
- records collected or maintained in connection with complaints, investigations, or other circumstances that may lead to various administrative or court proceedings.

It is strongly recommended that local governments consult with legal counsel when responding to an open records request. Additional resources on open records requests can be found by visiting the Wisconsin Department of Justice, [Office of Open Government’s website](#).

Personally Identifiable Information (PII):

Wisconsin law defines Personally Identifiable Information (PII) as “information that can be associated with a particular individual through one or more identifiers or other information or circumstances” (Wis. Stat. § 19.62(5)). The municipal unit is responsible for evaluating their record series to determine if PII is included. The inclusion of PII does not automatically restrict records, nor does it make them confidential. The confidential column is only marked “yes” in cases where specific statutes restrict access.

VI. Additional Schedules:

Municipal governments should be aware that there are additional schedules that apply to public records. All Wisconsin municipalities have the option of adopting any of the General Records Schedules that have been approved by the PRB. These schedules may cover additional record series not found in the WMRS. In some cases, the WMRS points to the General Schedules for covering some specific records series (such as personnel records). The complete list of approved general records schedules can be found on the [Public Records Board website](#).

Municipalities should also be aware that there are two separate General Records Schedules for the following:

- [Wisconsin School Districts](#)
- [Wisconsin Public Libraries and Library Systems](#)

In addition, municipalities should check the schedule set by the Public Service Commission of Wisconsin (PSC) for Municipal Utilities. A complete list of records and schedules is located in [“Investigation to Consider Proposed Changes to Records Retention Requirements for Electric, Gas and Water Utilities.”](#)

Municipal Court Records are scheduled by [Supreme Court Rule 72](#), which specifies the retention periods for court records and requires municipal courts to give 60 day notice to the Wisconsin Historical Society prior to destroying obsolete records. Furthermore, SCR 72 states that notice is not required for records in which “the historical society has indicated, by blanket waiver, that it has no interest for historical purposes.” The Wisconsin Historical Society has waived the sixty-day notification period for all municipal court records dated 1941 or later. This waiver applies to all municipal courts throughout the state and allows for the disposal of municipal court records without further notification. Municipal Courts are still obligated to maintain the records for the minimum time specified in SCR 72. Please contact the Wisconsin Historical Society if you have any questions regarding Municipal Court Records.

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Administrative Records

Requirements Specific to Administrative Records

The Administrative Records section is organized by the following subsections:

- Administration (general)
- Common Council/Village Board/Town Board
- Emergency Planning
- Human Resources/Personnel
- Legal
- Licenses and Permits
- Municipal Land Ownership
- Municipal Vehicles
- Payroll
- Real Property Titles

This section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review and consult the appropriate General Records Schedules listed below:

- [Administrative Records General Schedule](#)
- [Fleet and Aircraft Management Records](#)
- [Human Resources and Related General Schedule](#)
- [Payroll & Related General Schedule](#)

Municipal Court Records are scheduled by [Supreme Court Rule 72](#), which specifies the retention periods for court records and requires municipal courts to give 60 day notice to the Wisconsin Historical Society prior to destroying obsolete records. Furthermore, SCR 72 states that notice is not required for records in which “the historical society has indicated, by blanket waiver, that it has no interest for historical purposes.” The Wisconsin Historical Society has waived the sixty-day notification period for all municipal court records dated 1941 or later. This waiver applies to all municipal courts throughout the state and allows for the disposal of municipal court records without further notification. Municipal Courts are still obligated to maintain the records for the minimum time specified in Supreme Court Rule 72. Please contact the Wisconsin Historical Society if you have any questions regarding Municipal Court Records.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Administration Records (general)				
Appointment Files	Materials documenting appointments and nominations to boards, task forces, councils, or other bodies. May include applications; cover sheets, letters of recommendation, resumes, and correspondence.	Event+2 years; Event=End of term	No	Notify
Appointment Files (not selected)	Unsuccessful appointments and nominations to boards, task forces, councils, or other bodies.	Event+1 year; Event=Position filled	No	Waive
Committee Records and Minutes (Excluding Common Council and Zoning Board)	Records of committees, boards, councils, and commissions, other than Common Council. Includes meeting minutes, agenda packets, reports, and resolutions. See Common Council section for retention of Common Council Minutes. See schedule for Zoning Board Records in Public Works Section.	Creation+7 years	No	Notify
Complaints (External)	File related to complaints regarding issues not related to a specific program. Complaints are not otherwise regulated by state or federal requirements.	Event+2 years; Event=Complaint resolution, dismissal or end of litigation	No	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Contracts and Agreements	Any contracts or agreements to which the municipality is a party.	Event+6; Event=End date or cancellation of contract	No	Waive
Correspondence (Senior Level or Elected Official)	Business-related correspondence (paper and electronic) of senior level staff and elected officials.	Event+6 months; Event=Separation from position/end of term Note: Correspondence that relates specifically to a program or project may need to be retained per that particular schedule	No	Notify
Correspondence (General Staff)	Business-related correspondence (paper and electronic) of non-appointed general staff.	Event+1 year; Event=Creation or receipt Note: Correspondence that relates specifically to a program or project may need to be retained per that particular schedule	No	Waive

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Grants	Records relating to grant-funded projects where the agency is the grant recipient or issuer, including the application process, the receipt and expenditure of grant funds, or denial.	Event+4 years; Event=Date of final report or notification of denial	No	Waive
House Number and Address Change File	Provides official control and reference source for city addresses.	Permanent	No	N/A
Internal Policies and Procedures	Established departmental policies and procedures. Note: May also be called administrative practices or directives or executive directives.	Event+7 years; Event=Date the policy/procedure is superseded or made obsolete	No	Waive
Memorandums of Understanding (MOU) & Service Level Agreements (SLA)	Agreements between government units. Sometimes define agreements between a large government unit's separate divisions or bureaus.	Event+4 years; Event=Ending date of the MOU or SLA.	No	Waive
Notice of Removal of Human Corpse	Form for the removal of a human corpse if death occurs in a hospital, nursing home, or under hospice care at any location.	Event+2 months; Event=Date of death	No	Waive

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Oath of Office	Elected or appointed municipal officers may be required to take, and file in writing, an official oath within ten days after receiving notice of election or appointment.	Event+5 years; Event=End of term	No	Waive
Open Records Requests and Responses	Records relating to regular and reformulated, repetitious, systematic or continuing requests by individuals, groups or organizations for access to general information under the provisions of the Wis. Stats. §§ 19.35-19.37.	Event+3 years; Event=Response provided	No	Waive
Organizational Chart	Repository of the official organizational structure of offices.	Event; Event=Superseded	No	Waive
Organizational Planning	Includes division and unit strategic business and operational planning files such as, but not limited to, final plan and significant work papers.	Event+7 years; Event=Completion of plan	No	Notify
Petitions	Petitions submitted to municipalities for improvements or changes to existing municipal services/structures.	Event+7 years; Event=Petition approved or denied	No	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Press/News Releases	Information about municipality programs and events.	Creation+3 years	No	Notify
Proclamations	Proclamations issued by the mayor, commissioner, or elected executive on behalf of the municipality.	Event+1 year; Event=End of elected representative's final term	No	Notify
Reports (Annual)	Annual reports produced by all departments and programs.	Event+7 years; Event=Date of issue	No	Notify
Reports (Monthly)	Monthly reports of divisions/committees.	Creation+3 years	No	Waive
Subject Files (Senior Level or Elected Official)	Subject files (paper and electronic) of senior level staff such as department heads and elected officials.	Event+6 months; Event=Separation from position/end of term	No	Notify

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Common Council/Village Board/Town Board				
Affidavits of Publication	Records providing proof of publication for legal notices as required by law. (Note: See Wis. Stat. § 985.12 for more information on proof of publication).	Event+7 years; Event=Date of publication	No	Waive
Audio Tapes	Recordings of meetings used to produce minutes. Authority provided by Wis. Stat. § 19.21(7).	Event+90 days; Event=Date the minutes have been approved and published	No	Waive
Minutes (Common Council)	Official minutes of the Common Council/Village Board/Town Board.	Permanent	No	N/A
Ordinances	Official ordinances and any ordinance books kept by municipalities.	Permanent	No	N/A
Resolutions	Official records pertaining to resolutions passed by municipalities.	Permanent	No	N/A

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Emergency Planning¹				
Continuity of Government Operational Plan and Documentation	Agency official plan and documentation of the Continuity of Operations Plan/Continuity of government plan.	Event; Event=superseded by revised plan	No	Waive
Critical Incident Management Plans	Critical incident management plans, local site security plans, local emergency action plans, life safety, and other similar documents.	Event+3 years; Event=superseded by revised plan	No	Waive
Disaster Recovery Records	Records created during the disaster recovery process.	Event+3 years; Event=Date recovery effort is complete ²	No	Waive
Human Resources/Personnel				
Grievance Case File	Records of grievances filed by employees.	Event+7 years; Event=Date grievance is closed	Yes ³	Waive

¹ No specific statutes restrict the records in this series. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to release.

² Note: When Federal Grant money is involved, the retention is 3 years from the date of the final Financial Services Report.

³ No specific statutes restrict this type of record. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to releasing this type of record. Personnel files may contain patient health records which may be protected by Wis. Stat. § 146.82 and/or the Health Insurance Portability and Accountability Act (HIPAA).

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Personnel Files	Documents employee personnel actions during the employment of the employee. Applies to ALL employees.	Event+7 years; Event=End of employment/service	No ⁴	Waive
Legal				
Attorney Opinions	Municipal attorney opinions given to answer specific questions regarding the interpretation and application of statutes and ordinances, or other legal matters.	Permanent	No ⁵	N/A
Case Files	Files include, but are not limited to, pleadings and legal arguments, evidence, research, orders, legal summons and subpoenas issued. ⁶	Event+7 years; Event=Close of case	No ⁷	Notify on historically significant cases only ⁸

⁴ No specific statutes restrict this type of record. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to releasing this type of record. Personnel files may contain patient health records which may be protected by Wis. Stat. § 146.82 and/or the Health Insurance Portability and Accountability Act (HIPAA).

⁵ Records may contain material protected by Attorney-Client Privilege Wis. Stat. § 905.03.

⁶ Records may contain the client file with information pertaining to expenses, attorney notes, medical records, government agency filings, discovery such as requests for production of documents, deposition transcripts, and evidence.

⁷ Records may contain material protected by Attorney-Client Privilege Wis. Stat. § 905.03.

⁸ Historically significant case files include those that have established legal precedents; cases that received widespread attention from the public and news media; and cases recognized for their uniqueness. Examples of such cases include, but are not limited to, major civil rights cases, major labor relations cases, major environmental cases, cases dealing tribal governments and treaty rights, major cases with constitutional implications, and cases related to major prosecutions of public officials.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Licenses and Permits				
License Applications	Includes license applications (approved and unapproved) and license stubs. Includes all non-alcohol related licenses including, but not limited to, non-intoxicating beverages, soda water beverages, food handling and sales, mobile home park licenses, restaurant, retail dairy products, pet, and animals. Also includes permits for the excavation of streets by private utility companies.	Creation+3 years	No	Waived
Liquor and Beer Licenses	Includes license applications (approved and unapproved) and license stubs. Authority provided by Wis. Stat. § 125.04(3)(i).	Creation+4 years	No	Waived
Permits	Permits for public space usage. Includes, but not limited to, burning, street usage, and parking permits. NOTE: See Public Works Section for retention of building permits.	Creation+5 years	No	Waived
Permits (septic tanks)	Permit for a septic tank. The permit records the location and ownership of the tank.	Permanent	No	N/A

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Municipal Land Ownership				
Land Titles, Conveyances and Easements	Documentation for municipal owned land. Also includes any legal rights granted to others that relate to municipal owned land.	Permanent	No	N/A
Sales of Facilities and/or Land (Case Files)	Includes appraisals and related valuations. Projects where a municipality plans or actually sells either facilities and/or land assets.	Event+6 years; Event=date of the completion of the transaction	No	Waived
Municipal Vehicles				
Motor Vehicle Control and Assignment Records	Documentation of agency motor vehicle assignments to employees. Includes completed documentation on reservations for pool cars, individual trips, driver profiles, check-in and checkout logs.	Event+1 year; Event=date the vehicle is disposed	No	Waived
Motor Vehicle and Heavy Equipment Maintenance Records	Records documenting service and repair orders to motor vehicles. These records normally include maintenance orders, logs, fiscal documents, such as requisitions or purchase orders for parts or services, vehicle warranties, operation and repair manuals and parts lists.	Event+1 year; Event=date the vehicle is disposed	No	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Vehicle Use Agreements	Agreements between individuals and municipalities required before driving a municipal owned vehicle.	Event+1 year; Event=termination of agreement or employment	No	Waived
Vehicle Inspection Reports	Inspections of municipal vehicles.	Event+1 years; Event=date the vehicle is disposed	No	Waive
Payroll⁹				
Employee Payroll & Benefit File	Includes various documents that are maintained throughout the employee's term of employment.	Event+7 years; Event=Employee retirement, transfer or termination	No	Waived
Monthly and Quarterly Payroll Reports	Includes, but is not limited to, quarterly report of federal income tax withheld; quarterly report, payroll summary; state's quarterly report of wages paid, and monthly memorandum report.	Event+5 years; Event=Report Issued (provided record has been audited)	No	Waived

⁹ No specific statutes restrict this record series. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to releasing this type of information.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Payrolls and Payroll Registers	Payroll listings showing gross and net pay, as well as deductions for state employees. Referred to on questions of back pay and income taxes.	Creation+4 years	No	Waived
Real Property Titles				
Title Documentation	Records documenting the title of land owned by the municipality including the abstract and certificate of title, opinions of title, and title insurance policies.	Permanent	No	N/A

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Cemetery Records

Requirements Specific to Cemetery Records

Municipalities and towns are required to assume ownership of abandoned private cemeteries. Cemeteries are considered abandoned if the cemetery association or other organization that once cared for the cemetery no longer exists and no legal owner can be found (Wis. Stat. § 157.115(1)).

- The municipality or town must care for the cemetery to the same standards as other municipal or town cemeteries.
- Six or more residents of your town or municipality may petition the circuit court to require that the town or municipality assume ownership or move any graves to another location.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Annual Report and Documentation	Includes the annual report to the cemetery board and the records needed to prepare the report. Authority provided by Wis. Stat. § 157.62(4).	Permanent	No	N/A
Care Funds	An accounting of amounts deposited in, amounts withdrawn from, other income accruing to, and the balance at the end of the reporting period of care funds of the cemetery, including the funds in Wis. Stat. § 157.11(9g)(a), Wis. Stat. § 157.12(3), and Wis. Stat. § 157.125. Including records that show, for each deposit, the name of the purchaser or beneficiary of the contract relating to the deposit and the item purchased. Authority provided by Wis. Stat. § 157.62(4).	Permanent	Yes Confidential per Wis. Stat. § 157.62(2)(c)	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Contract for Sale	Copy of each contract for the sale of a cemetery lot, mausoleum space, or cemetery merchandise. Authority provided by Wis. Stat. § 157.62(4).	Event=3 years; Event=After all of the obligations of the contract have been fulfilled	No	Waive
Grave Registration Records	Records that describe who is buried, the date of death, interment and location of the remains.	Permanent	No	N/A
Preneed Trust Funds	An accounting of amounts deposited in, amounts withdrawn from, income accruing to, and the balance at the close of the reporting period of any preneed trust funds of the cemetery. Including records that show, for each deposit, the name of the purchaser or beneficiary of the contract relating to the deposit and the item purchased. Authority provided by Wis. Stat. § 157.62(4).	Event+15 years; Event=Date of the deposit or withdrawal	Yes Confidential per Wis. Stat. § 157.62(2)(c)	Waive
Reburial of Human Remains	Includes records confirming an attempt to notify individuals specified in Wis. Stat. 157.112(3)(b)1.-4. when none of the individuals specified are available. Authority provided by Wis. Stat. § 157.112(3m).	Permanent	No	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Report for Final Disposition	<p>Report for final disposition completed by the funeral director or other person preparing the body for burial or other final disposition. The reports are filed with the local register, but may also be filed with the cemetery to serve as a record of interment.</p> <p>Authority provided by Wis. Stat. § 135.06(1)(a)(1).</p>	Permanent	No	N/A

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Community Development/Public Services

Requirements Specific to Community Development/Public Services

The Community Development/Public Services section is organized by the following subsections:

- Housing Program
- Outreach
- Parks
- Public Transportation
- Sanitation

This section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review the [County General Schedule](#) for reference on scheduling similar records. The County General Schedule cannot be adopted by municipalities for use, but the schedules can be used for creating record schedules through municipal ordinances.

Municipalities that have records pertaining to Public Health should use the County General Schedule to create ordinances to schedule those records.

The retention of public transportation surveillance recordings is covered by the schedule for [surveillance recordings](#) listed under the subsection Maintenance and Operations in the Public Works section.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Housing Program				
Program Files	Correspondence, breakdown of projects, HUD regulations, and supporting files.	Event+7 years; Event=Audit	No	Notify
Outreach				
Public Program Files	Outreach programs for municipality sponsored programs.	Event+7 years; Event=Superseded or end of program, whichever is first	No	Notify
Parks				
Park Master Plan	Master plans for parks and park systems. May include maps, drawings, photographs, and reports.	Superseded	No	Notify
Program Files	Records relating to programs, events, and activities.	Creation+3 years	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Reservation Requests, Rental Agreements, Use Permits, and Contracts	Permits, agreements, and contracts for the use of parks, shelters, and facilities.	Event+3 years; Event=Date of reservation	No	Waived
Supervisors Daily Report of Work Completed	Summarizes progress made on a particular job, noting the time required, employees assigned and vehicles used.	Creation+2 years	No	Waived
Public Transportation				
Accessible Boarding Reports	Reports documenting the accessibility of vehicles.	Creation+5 years	No	Waive
Americans with Disabilities Act (ADA) Customer Eligibility Files	Files determining the eligibility of customers for ADA transit programs.	Event+6 years; Event=Termination of service or participation by customer	Yes Patient health information may be protected by Wis. Stat. § 146.82	Waive
Bus Route Schedules and Timetables	Documentation of transit schedules, timetables, routes, and route history.	Event+3 years; Event=Superseded	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Dispatch Files	Boarding and alighting, extra board weekly projections and assignments, daily work schedules, and bid mark-ups.	Creation+7 years	No	Waive
Fare Information Files	Research, background, studies, and other materials used to determine fares.	Creation+7 years	No	Waive
Operation Reports	Daily, weekly, or other periodic reports summarizing transit system operations and ridership and lost and found reports.	Creation+3 years	No	Waive
Operator Assignment Records	Documentation of assignment of individual operators to routes and shifts.	Creation+3 years	No	Waive
Sanitation				
Composting Regulations	Documents pertaining to the disposal of yard waste.	Event+7 years; Event=superseded	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Curbside Recycling Program	Documentation of the curbside recycling program including policies, procedures, and administration of the program.	Event+7 years; Event=superseded	No	Waive
Drop Off Site/Recycling Yard Waste	Site operation files and records.	Creation+7 years	No	Waive
Household Hazardous Waste Collection Center	Records related to the collection and disposal of paints, corrosives, flammables, toxics, used motor oil, and car/truck batteries.	Creation+30 years	No	Waive
Landfill/Garbage Dump Sites	Location of any fill, records of materials deposited, cover materials used, reports of leachate and methane leakage and treatment, source of fill materials, (household, commercial) source of cover materials, and inspection reports.	Permanent	No	N/A

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Election Records

Requirements Specific to Election Records

Additional information regarding election records is available through the Wisconsin Election Commission. Municipalities are encouraged to review the [Election Administration Manual](#) available on the Wisconsin Elections Commission Website for more in-depth information about managing election related records. Retention times in this section that are not specifically stated in Wisconsin Statutes are taken from the *Election Administration Manual*.

- Federal Election records must be maintained for 22 months as specified in Wis. Stat. § 7.23(1)(f).
- Recounts or Pending Litigation are subject to a longer retention pending litigation or recounts as specified in Wis. Stat. § 7.23(2).
- All other material not described below are identified by Wis. Stat. § 7.23(1)(k) as having a retention period of 90 days after the election.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Ballots and Equipment				
Applications for Absentee Ballots (Federal Elections)	Includes copies of proof of identification when submitted with application. Authority provided by Wis. Stat. § 7.23(1)(f).	Event+22 months; Event=Election ¹⁰	No	Waived

¹⁰ All materials and documentation associated with a federal election must be retained at least 22 months after the election. Federal elections include those for the office of President of the U.S., U.S. Senator, and U.S. House of Representatives (Wis. Stat. § 7.23(1)(f)).

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Applications for Absentee Ballots (State, County, Local Elections)	Includes copies of proof of identification when submitted with application. Authority provided by Wis. Stat. § 7.23(1)(k).	Event+90 days; Event=Election	No	Waived
Ballots (Federal Elections)	Federal election ballots. Authority provided by Wis. Stat. § 7.23(1)(f).	Event+22 months; Event=Election	No	Waived
Ballots (State, County, Local Elections)	State, county, local offices. Authority provided by Wis. Stat. § 7.23(1)(h).	Event+30 days; Event=Election	No	Waived
Ballots (Unused and related Materials)	Only applies to unused ballots and materials. Authority provided by Wis. Stat. § 7.23(1)(a).	Event+3 business days; Event=Completion of all election canvasses ¹¹	No	Waived

¹¹ Materials must be retained in event a petition for recount has been filed.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Detachable Recording Units	Data storage devices used in electronic voting equipment. Authority provided by Wis. Stat. § 7.23(1)(g).	Event+21 days; Event=Election ¹²	No	Waived
Detachable Recording Units (Primary Elections)	Data storage devices used in electronic voting equipment. Authority provided by Wis. Stat. § 7.23(1)(g).	Event+14 days; Event=Election ¹³	No	Waived
Campaign				
Campaign Finance Reports	Financial disclosure reports filed by candidates during election campaigns. Authority provided by Wis. Stat. § 7.23(1)(d).	Event+6 years; Event=date of receipt	No	Waived

¹² Before clearing or erasing the units or compartments, a municipal clerk shall transfer the data contained in the units or compartments to a disk or other recording medium which may be erased or destroyed 22 months after the election to which the data relates. The requirement to transfer data does not apply to units or compartments for use with tabulating equipment for an electronic voting system that was approved for use prior to January 1, 2009, and that is not used in a federal election.

¹³ Before clearing or erasing the units or compartments, a municipal clerk shall transfer the data contained in the units or compartments to a disk or other recording medium which may be erased or destroyed 22 months after the election to which the data relates. The requirement to transfer data does not apply to units or compartments for use with tabulating equipment for an electronic voting system that was approved for use prior to January 1, 2009, and that is not used in a federal election.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Campaign Registration Statements	Statements filed by candidates for public office. Includes Notification of Non-candidacy for reelection forms. Authority provided by Wis. Stat. § 7.23(1)(d).	Event+6 years; Event=termination issued by the registrant	No	Waived
Reports and Lists				
Official Canvassers Statements	Prepared statement showing the results of each election. Authority provided by Wis. Stat. § 7.23(1)(i).	Event+10 years; Event=election	No	Waived
Election Notices	Includes proofs of publication and correspondence filed in connection with such notices. Authority provided by Wis. Stat. § 7.23(1)(j).	Event+1 year; Event=Election	No	Waived
Election Notices (Federal Elections)	Includes proofs of publication and correspondence filed in connection with such notices. Authority provided by Wis. Stat. § 7.23(1)(j).	Event=22 months; Event=Election	No	Waived
Election Voting and Registration Statistics Reports	Reports filed by municipal clerks on registration, voting, and absentee voting. Authority provided by Wis. Stat. §§ 6.275-6.276.	Event+22 months; Event=Election	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Ineligible Elector Registrations	Elector registrations deemed ineligible for voting. Status and reasons for ineligibility should be noted. Authority provided by Wis. Stat. § 7.23(1)(c).	Event+4 years; Event=When deemed ineligible	No	Waived
Poll (Voter) Lists	List compiled by election officials on election day showing the names and addresses of electors who actually cast votes in an election defined in Wis. Stat. § 5.02(14). Authority provided by Wis. Stat. § 7.23(1)(e).	Event+22 months; Event=Election	No	Waived

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Finance Records

Requirements Specific to Finance Records

The Finance section is organized by the following subsections:

- Budget
- Fiscal
- Purchasing

Municipalities are encouraged to adopt the following general schedules in instances where this schedule does not adequately provide coverage for all types of records that could be created:

- [Budget and Related General Record Schedule](#)
- [Fiscal & Accounting Related Records General Schedule](#)
- [Purchasing & Procurement General Schedule](#)

Note: Records in this series may contain confidential or restricted information. Even when specific confidentiality statutes do not apply, application of substantive common law principles through the balancing test considerations under Wis. Stat. § 19.35(1)(a), may affect disclosure of the record under the public records law. Please consult [Section V: Confidential Records and Personally Identifiable Information \(PII\)](#) of the Introduction for more information on this topic.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Budget				
Approved Annual Operating Budget	Records related to establishing the base level agency annual operating budget each fiscal year.	Fiscal+6 years	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Audit Reports	Reports that evaluate the financial holdings of the municipality.	Event+3 years; Event=Final report issued	No	Waived
Budget Documents/ Development	Records include final budget requests (forms or their equivalents), justifications/analysis, policy papers, related correspondence, and requests for information.	Fiscal+6 years	No	Waived
Final Budget Submittal	The final budget document for the municipality.	Fiscal+6 years	No	Waived
Municipal Borrowing				
Bond Records	All records associated with municipal bonds. Also includes the bond register, bond payment register, and any certificates of destruction when the bond agent has been authorized to destroy cancelled bonds, coupons, and promissory notes.	Event+7 years; Event=Bond issue expires or following payment of all outstanding matured bonds/notes/coupons, whichever is later	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Payments and Receipts				
Bank Statements/ Reconciliations	Statements received from institutions holding the municipality's funds.	Creation+7 years	No	Waived
Cashbook	Overall record accounting for receipts and disbursements, usually for fiscal or calendar year.	Event+7 years; Event=Audit	No	Waived
Collection & Disbursement Reports	Reports showing the amounts collected, amounts retained by county/local government, and portion sent to state.	Event+3 years; Event=Transaction date	No	Waived
Credit Card Receipts or Information Received from Sales	Credit card receipts and related documentation associated with credit card transactions.	Event+3 years; Event=Transaction date	No	Waived
Financial support records	Records used in reconciling bank statements and verifying expenditures. Includes, but not limited to, credit/debit notices, cash reconciliations, and deposit stubs.	Event+1 year; Event=Audit	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Issued Checks	Checks issued by the municipality that are outstanding or have been cleared by the bank.	Creation+7 years	No	Waived
Purchasing				
Contract and Request for Bid /Proposal File	Records pertaining to the procurement of all commodities and services which may require a contract. This includes both successful and unsuccessful bids.	Event+6 years; Event=End date of resulting contract or cancellation date of contract or bid/proposal	Yes ¹⁴ Some information may qualify for Trade Secret protection per Wis. Stat. § 19.36(5).	Waived
Vendor Performance Files	Documentation of vendors and contractors who fail to meet the terms and specifications of purchasing contracts.	Event+6 years; Event=End of contract	No	Waived

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¹⁴ Some information may qualify for other legal protection such as copyright, patent, trademark or licensing. It is possible some vendors may identify information as confidential that is not actually protected by law.

Public Works

Requirements Specific to Public Works

Records in the Public Works section are arranged under the following subsections:

- Building Inspection
- Engineering
- Maintenance and Operations
- Planning and Zoning
- Utilities

The Public Works section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review and consult the appropriate General Records Schedules listed below:

- [Facilities Management and Related Records](#)

Wis. Stat. § 19.21(4)(b) defines the minimum retention cities, villages, and towns may set for water stubs, receipts of current billing, and customer's ledgers of any municipal utility as 2 years. In addition, municipalities should check the schedule set by the Public Service Commission of Wisconsin (PSC) for Municipal Utilities. A complete list of records and schedules is located in "[Investigation to Consider Proposed Changes to Records Retention Requirements for Electric, Gas and Water Utilities.](#)"

Schedules specific to Police/First Responder records are not included in the WMRS. Consult the County General Schedule for records schedules for similar records which can be used as a basis for the creation of schedules and/or ordinances.

Surveillance recording schedule applies to municipally operated security footage for public buildings, street cameras, and public transportation. The schedule **does not apply** to footage recorded by police body cameras, patrol dashboard cameras, or any similar police recording device.

Municipalities should have adequate and clear procedures in place that explain the proper handling and destruction of surveillance recordings. Clear communication with appropriate municipal personnel will help to ensure that the record is not destroyed prematurely and public requests and/or any legal or program needs are met in a timely manner.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Building Inspections				
Building Inspection Records	Summary of inspection history of a particular property. Records include original building permit, site plans, certificate of occupancy, conditional use documents, comprehensive design reviews, and violations for both residential and commercial structures. Also includes inspection of plumbing, electrical, ventilation, heating, and air conditioning.	Event+1 year; Event=Life of building	No	Waived
Building Plan Review and Inspection	Conditionally approved building plans, calculations, and correspondence. Authority provided by Wis. Admin. Code § SPS 361.60(5)(f)1.b. Note: applies to certified municipalities only (see Wis. Admin. Code § SPS 361.60(2)). ¹⁵	Event+4 years; Event=Construction completed	No	Waived

¹⁵ Note: Refer to Wis. Admin. Code § SPS 361.60(5) for detailed information on the specific types of buildings that first class, second class, and other municipalities are authorized by the Department of Safety and Professional Services to review. Prior to applying this schedule, the Municipality must review and take the steps outlined in Wis. Admin. Code § SPS 361.60.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Building Plans: Residential 1 and 2 Family Dwellings	Includes architectural, design specs, structural and utility plans submitted for inspection review. Authority provided by Wis. Admin. Code § SPS 320.10(6)(a)2.	Event+4 years; Event=Construction completed	No	Waived
Building Inspection: Residential 1 and 2 Family Dwellings	Applications forms, correction orders, correspondence and inspection records. Authority provided by Wis. Admin. Code § SPS 320.10(6)(a)3.	Event+ 7 years; Event=Construction completed	No	Waived
Code Compliance Inspection Reports	Reports completed during field investigations to determine if buildings and system installations comply with the specifications of appropriate codes.	Permanent	No	N/A
Engineering				
Airport Improvement Petition File	Material submitted to the Department of Transportation when a municipality wants to make an improvement to the airport. Records may include public hearing records, briefs, reports and recommendations, and correspondence.	Event+7; Event=p petition submitted to DOT	No	Waived
Airport Master Plan	The Airport Master Plan provides information about the condition of the airport and projects development for the next 20 years.	Event+20 years; Event=new plan issued	No	Notify

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Construction Plans: Final As-Built Projects	Final as-built plans and original drawings for public for buildings, streets, sewers, sidewalks, etc.	Event; Event=life of structure	No	Waived
Construction Plans: Final As-Built Projects (Historically Significant)	Use for historically significant projects.	Event; Event=life of structure	No	Notify
Environmental Assessment & Impact Statements	Official copies of environmental assessments, impact statements and related documentation related to municipal construction projects. ¹⁶	Event+6 years; Event=Termination of municipal ownership of the land	No	Notify
Maps: Construction and Topographical	May include maps covering environmental impact/changes, development of specific areas, and the impact on public infrastructure (utilities, roads, sidewalks).	Permanent	No	N/A

¹⁶ May include: environmental assessment reports and drafts, environmental impact statements (draft and final), legal notices, comments from the public, DNR and others, related correspondence and supporting materials.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Project Records	All documents pertaining to a project including, design and construction contracts, proposed and approved amendments to all contracts, bidding plans and specifications, details on materials used on each project, and all other related project materials. Use for buildings, streets, sewers, sidewalks, etc.	Event+10 years; Event=Date project is completed	No	Waived
Project Records (Historically Significant)	Use for historically significant projects.	Event; Event=Life of structure	No	Notify
Maintenance and Operations				
American with Disabilities Act (ADA) Facility Reviews	Records cover ADA inspections, investigations, complaint investigations, facility logs and reports regarding ADA compliance relating to facilities and structures.	Event+6 years; Event=Close of review or audit	No	Waived
Asbestos and Hazardous Material and Environmental Remediation Case File	Project files on asbestos abatement and hazardous materials and environmental remediation projects at state owned buildings. ¹⁷	Event+30 years; Event=Completion of the project	Yes ¹⁸	Waived

¹⁷ OSHA 29CFR 1926.1101 governs asbestos abatement projects. The records include medical surveillance records for certain people who wear protective equipment performing asbestos abatement work.

¹⁸ Patient health care records in this series are confidential per Wis. Stat. § 146.82.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Building Maintenance: Equipment Repair and Service Records	Documents the installation, maintenance, service and history of equipment commonly used to maintain facilities.	Event+1 month; Event=Removal and disposal of equipment	No	Waived
Building Lease Files	Files on leased facilities.	Event+7 years; Event=End of lease	No	Waived
Maps	Series may document road locations or surfaces, zoning information, parks, flood plains, soils, or parcel boundaries. This record series may also include indexes to maps. ¹⁹	Permanent	No	N/A
Physical Plant Monitoring and Inspection Reports	Records documenting the operation of all facets of facilities: VAC; plumbing, mechanical, electrical, structural as well as special monitoring of building components.	Creation+6 years	No	Waived

¹⁹ Copies of maps that are retained by local government offices after originals have been sent to other government units for retention may be destroyed 90 days after they have been transferred. An example of this are copies of certified survey maps created by local units and then sent to the county register of deeds office for retention under Wis. Stat. § 236.34(2).

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Profile and Grade Books	Documentation of landscape and features.	Permanent	No	N/A
State Highway Aids Program Records	Records of state aid pertaining to road maintenance.	Creation+7 years	No	Waived
Street and Sidewalk Operations File	Documentation of the performance of tasks related to street and sidewalk maintenance. This may include solid waste management, street cleaning, repairs, snow removal, and garbage collection.	Creation+7 years	No	Waived
Surveillance Recordings	Monitoring and surveillance recordings for public buildings, street cameras, and public transportation. ²⁰	Event+120 days ²¹ Event=Date of recording (Note: Recordings may be subject to longer retention. See footnote for more information.) ²²	No	Waive

²⁰ The schedule does not apply to footage recorded by police body cameras, patrol dashboard cameras, or any similar police recording device.

²¹ 120 days is the time within which a claim may be filed against a governmental body as defined in Wis. Stats. § 893.80.

²² Surveillance recordings that are required for any legal or programming purpose (such as open records requests, claims, case file, or litigation holds) must be retained in accordance with any applicable records schedules and/or have completed their legal or programming requirements.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Planning and Zoning				
Aerial Photographs	Aerial photographs used for planning and map creation.	Event; Event=Superseded	No	Notify
Annexation Records	Incorporation records such as petitions, hearing testimony and exhibits, court orders, notices, resolutions, and related correspondence. ²³	Permanent	No	N/A
Comprehensive Growth and Development Plan	Provides general goals, objectives, policies and implementation recommendations to guide the future growth and development of the city.	Event+14 years; Event=Superseded by new plan	No	Notify
Conditional Use Permits	Applications and related documents for a conditional use permit. Applications include site plan, applicate statement, and evidence evidence/documentation. This series may also include public hearing notice, reports, public hearing documentation, and decision.	Event+7 years; Event=termination of conditional use permit	No	Waived

²³ Records cover proposed incorporations of town areas into cities and villages pursuant to Wis. Stat. § 66.0201 - § 66.0209, and municipal consolidations of towns with cities and villages pursuant to Wis. Stat. § 66.0229.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Easements	Grants of easement to the municipality.	Permanent	No	N/A
Final Plats	A map showing the divisions of a piece of land, this series includes vacation or alterations of plats, annexation plats, and final subdivision plats.	Permanent	No	N/A
Preliminary Plats	Created during the development of subdivisions.	Event; Event=Superseded by final plat	No	Waived
Property Survey Records	Includes field notes, benchmark books, and section corner monument logs.	Permanent	No	N/A
Zoning Appeals, Approved	Material submitted to appeal a zoning decision. May include maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Permanent	No	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Zoning Appeals, Unapproved	Material submitted to appeal a zoning decision. May include maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Event+7 years; Event=Final appeal is closed	No	Notify
Zoning Board and Zoning Board of Appeals Meeting Material	Agendas, minutes, reports, plans, and other material submitted to the Zoning Board, and/or Zoning Board of Appeals.	Permanent	No	N/A
Zoning Ordinance	The text of the zoning ordinance spells out uniform rules that apply to each zoning district including: uses of the land (permitted, conditional and prohibited uses), dimensional standards (lot size, frontage, setbacks, building height, bulk, floor area), and the density of development. Authority provided by Wis. Stat. § 60.61.	Permanent	No	N/A
Zoning, Rezoning Files	May include, but is not limited to, maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Permanent	No	N/A
Zoning Variance Files	Records related to area and use variances. Documentation submitted by landowners to secure a variance to the zoning ordinance.	Permanent	No	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Utilities ²⁴				
Abandoned Mains and Services As-Built	Records may include final designs and location maps. Includes plans of private sewer and water systems.	Permanent	No	N/A
Excavation Plans of Private Utilities	Plans submitted by utilities needing to excavate to develop, expand, or repair utility lines.	Permanent	No	N/A
Inspections	Records documenting the inspection of water and sewer lines.	Permanent	No	N/A
Sewer Inspection Records	Indicates problems such as cracked or broken pipes, improper alignment, or loose lateral connections.	Event; Event=Superseded	No	Waived

²⁴ Wis. Stat. § 19.21(4)(b) defines the minimum retention cities, villages, and towns may set for water stubs, receipts of current billing, and customer’s ledgers of any municipal utility is 2 years. Local governments should also consult the schedule set by the PSC for Municipal Utilities. A complete list of records and schedules is located in “Investigation to Consider Proposed Changes to Records Retention Requirements for Electric, Gas and Water Utilities.”

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Water and Sewer Main Break Records	A record documenting the history of breaks in water and sewer main lines.	Permanent	No	N/A
Water, Storm, and Sanitary Sewer Main Maps	Maps providing the location of water, storm, and sanitary sewer mains. Also provides information about the depth, slope, size and composition of these features.	Permanent	No	N/A

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Revenue Records

Requirements Specific to Revenue Records

Records in the Revenue section are arranged under the following subsections:

- Assessment
- Board of Review
- Special Assessment
- Tax Calculation and Collection

The Revenue section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review the [County General Schedule](#) for reference on scheduling similar records. The County General Schedule cannot be adopted by municipalities for use, but the schedules can be used for creating record schedules through municipal ordinances.

Final real property assessment rolls have a retention period of 15 years and may be destroyed after that time has lapsed. However, Wis. Stat. § 59.52(4)(c)3 states that no assessment roll containing forest crop acreage may be destroyed without the prior approval of the secretary of the Department of Revenue. Municipalities should assume that assessment rolls from rural areas include forest crop acreage and that this provision applies to their assessment rolls. Municipalities should contact the Wisconsin Department of Revenue, Local Government Services Bureau for more information. This step is in ADDITION TO notifying the Wisconsin Historical Society of the upcoming record destruction.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Assessment				
Assessor' Final Reports	Documents yearly changes to master property record and personal property returns. Final report is filed with DOR.	Event+5 years; Event=Final report filed with DOR	No	Waive
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) ²⁵	No	Notify
Master Property Records	Details the appraisal of real property, based on the field inspections of the assessor.	Event+5 years; Event=Life of structure	No	Notify

²⁵ Wis. Stat. § 59.52(4)(c)3 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.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Notice of Increased Assessment	Notices sent to property owners informing them of increases on assessment.	Creation+7 years	No	Waive
Taxation Exemption Reports	Reports filed by individuals who own property exempt from personal property tax under Wis. Stat. § 70.11. The reports are submitted to the clerk of the taxation district. Authority provided by Wis. Stat. § 70.339.	Creation+10 years	No	Waive
Personal Property Statements	Statements filed with local assessor declaring taxable personal property.	Creation+5 years	Yes Confidential per Wis. Stat. § 70.35(3)	Waive
Board of Review				
Form of Objection	Objections submitted by taxpayers. Includes written objections and all other material submitted to the board of review.	Event+7 years; Event=Final action of Board of Review or completion of appeal	No	Waive
Minutes	Record of all proceedings of the board of review. Authority provided by Wis. Stat. § 70.47(5).	Creation+7 years	No	Notify

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Notice of Determination	Final decisions sent to property owners. Authority provided by Wis. Stat. § 70.47(12).	Event+7 years; Event=Final action of Board of Review or completion of appeal	No	Waive
Proceedings	Includes audio recordings and any transcripts of board of review proceedings, along with any notes taken by clerk. Authority provided by Wis. Stat. § 70.47(8)(f).	Event+7 years; Event=Final action of Board of Review or completion of appeal	No	Waive
Special Assessments				
Final Resolution	Final authorization of special assessments. Authority provided by Wis. Stat. § 66.0703(8)(d).	Permanent	No	N/A
Payment Register	Record of the receipt of scheduled payments.	Event+7 years; Event=Final collection of payments	No	Waive
Preliminary Resolutions	Issued by municipal district describing the purpose of the project, calculations, limits of assessment district, and number of installments to be paid. Authority provided by Wis. Stat. § 66.0703(4).	Creation+2 years (provided report is on file with public works project record)	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Report of Special Assessment	Report of project that includes plans, specifications, cost estimates, and property affected. See Wis. Stat. § 66.0703(5) for more information. Authority provided by Wis. Stat. § 66.0703(5).	Creation+2 years (provided report is on file with public works project record)	No	Waive
Tax Calculation and Collection				
Escrow Account List	List of real estate taxes paid directly from an escrow account.	Event; Event=Superseded	No	Waive
Final Tax Roll	Real and personal property rolls. Calculated from assessment rolls to include total taxes and charges to be collected.	Creation+15 years	No	Notify
Statement of Taxes	Combined record of calculations used to set final taxes.	Permanent	No	N/A
Tax Calculation Support Records	Any record used to calculate municipal taxes. These include any certificates, evaluations, levies, estimates, payments, and credits used to determine real and personal property tax rolls.	Event+7 years; Event=Audit	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Tax Receipts	Receipts issued by treasurer upon payment of taxes. Includes any supporting documents associated with issuing and recording receipts of payments.	Event+7 years; Event=Audit of records by outside accounting firm	No	Waive
Tax Settlements	Used to verify tax collections compared to the taxes levied in the municipal records.	Event+7 years; Event=Audit	No	Waive
Unpaid Tax Statements	List of postponed real property, delinquent real property, and delinquent personal property taxes.	Creation+15 years (Retain with tax roll)	No	Waive

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DATE: December 17, 2019

SUBJECT: MOTION 19-950 - To approve a Pediatric Jump Kit donated by the Wisconsin EMS Association (WEMSA) Foundation and Kids Health Vista Foundation.

BACKGROUND/HISTORY:

The City of Burlington Fire Department was entered into a program to receive a Pediatric jump kit on behalf of Wisconsin EMS Association (WEMSA) by Amanda Bates, a part-time Firefighter/EMT for the COBFD.

WEMSA formed a partnership with Kids Health Foundation, whose mission is to fund initiatives in children's healthcare with a bias toward social determinants of health, primary care, rural health, healthcare access, non-academic medical centers, critical access hospitals and medical centers.

Through this partnership and vision to support EMS and pediatric patients throughout Wisconsin, the Kids Health Vista Foundation has provided funding for almost 100 agencies to receive emergency pediatric equipment.

Staff is excited to report, the City of Burlington was a recipient of the following donations:

1. Pediatric backboard Valued at: \$139.99
2. Pediatric jump bag w/ supplies Stocked/ Valued at: \$250.00
3. Child Transport Restraint System Valued at: \$345.00

BUDGET/FISCAL IMPACT:

Acceptance of this donation will mean the City does not have to purchase new equipment in the near future. This equipment has an estimated value of \$735.00

RECOMMENDATION:

Staff recommends approval of the donated equipment from WEMSA and the Kids Health Vista Foundation.

TIMING/IMPLEMENTATION:

This item is presented for discussion at the December 17, 2019 Committee of the Whole meeting and is scheduled for final consideration at the same evening Common Council meeting.
