

Kenai Peninsula Borough  
Office of the Borough Clerk  
Records Management Division

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**MEMORANDUM**

**TO:** Brent Johnson, Assembly President  
Members, Kenai Peninsula Borough Assembly

**THRU:** Johni Blankenship, Borough Clerk (JB)

**FROM:** Michele Turner, Deputy Clerk/Records Manager (MT)

**DATE:** February 16, 2022

**RE:** Resolution 2022-016, Approving a Quarterly Update to the Borough Retention Schedule (Johnson at the request of the Borough Clerk)

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KPB 2.52.030(F) provides for the review and quarterly update of the retention schedule.

In collaboration with the departments, the following amendments are presented for the Assembly's consideration.

**Assessing**

In collaboration with the Borough Assessor the following clarifying language is recommended to address retention of sales questionnaires that are undeliverable:

ASG.ADM.01	DEPARTMENT OPERATIONS General office purchases; vendor information; training and education; membership; dues and subscriptions; budget work papers; advertising. <b><u>Returned sales questionnaires that are undeliverable.</u></b>	2 years/Office
ASG.ADM.19	SALES QUESTIONAIRES Completed Sales Questionnaires submitted to Assessor by property owners declaring purchase price of real property. <b><u>See ASG.ADM.01 for undeliverables.</u></b>	4 years/Office

**Clerk's Office**

The below recommended update will align the retention schedule with the enactment of Ordinance 2021-18, Election Integrity and Security:

CLK.ELE.33	<p><b>ELECTIONS - VOTED BALLOTS <u>AND TESTING MATERIALS</u></b></p> <p>All voted ballots including questioned, completed, challenged, rejected, absentee and special needs ballots. Ballot stubs, precinct election certificates, tallies, and receipts for ballots. <b><u>Logic and accuracy testing materials.</u></b></p> <p>C = Once election is certified, unless contested and stayed by an order of the court.</p>	<p>C/Office          1 year/Records Cntr.</p> <p>KPB 4.10.140  <b><u>KPB 4.60.040(B)</u></b></p>
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**Finance - Payroll**

In discussions with the Finance Director, the Finance Department now retains the records listed below in an electronic format and are retained in the department.

The recommended revision is as follows:

FIN.PAY.06	<p><b>COMPLETED W2 FORMS</b></p> <p>Federal withholding tax statements.</p>	<p><b><u>10 years/Office (e)</u></b>  <b><u>[3-years/Records Cntr.]</u></b></p>
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**Finance – Audit**

This request is to add a new record series to capture other audit files that were not previously defined.

FIN.AUD.04	<p><b><u>MISCELLANEOUS AUDIT FILES</u></b></p> <p><b><u>Documents, work papers, billing records and other items used in auditing businesses for compliance in areas other than sales and personal tax regulations.</u></b></p>	<p><b><u>1 year/Office</u></b></p> <p><b><u>6 years/Records Cntr.</u></b></p>
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### Human Resources

This revision was inadvertently overlooked at the last quarterly update. In discussions with the previous HR Director and HR Specialist, it was determined the Grievance Case Files record series did not offer enough description.

The following revisions are requested:

PER.ADM.23	<p><b><u>INCIDENT, INVESTIGATION AND</u></b> GRIEVANCE CASE FILES</p> <p><b><u>Personnel incidents, issues and investigation files, includes notes, correspondence and related backup.</u></b> [Documents]          Grievances [files] <b><u>filed</u></b> by employees, grievance forms, investigative notes, reports, correspondence and related backup.</p> <p>Note: certain information is confidential</p> <p>C = resolution and execution of any stipulations.</p>	<p>C+5 years/Office</p> <p>Permanent</p>
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### Fire and Emergency Service Areas

Service area board oaths of office, minutes, and board resolutions are administered and archived by the Clerk's Office.

The following updates are requested:

SAB.FES.05	<p>SERVICE AREA BOARD ADMINISTRATION (FIRE &amp; EMERGENCY)</p> <p>Board packets, agendas, <b><u>and meeting</u></b> notices, <del><b><u>minutes, resolutions.</u></b></del> Meeting audio is retained in office until administrative need is met.</p> <p><b><u>Note: See CLK.ADM.05 for oaths of office, minutes and board resolutions.</u></b></p>	<p>Permanent</p>
SAB.ADM.03	<p>SERVICE AREA BOARD ADMINISTRATION</p> <p>Board packets, agendas, <b><u>and meeting</u></b> notices, <del><b><u>minutes and resolutions.</u></b></del> Meeting audio is retained in office until administrative need is met.</p> <p><b><u>Note: See CLK.ADM.05 for oaths of office, minutes and board resolutions.</u></b></p>	<p>Permanent</p>

CLK.ADM.05	BOARDS / COMMISSIONS / SERVICE AREA BOARDS / TASK FORCES / COMMITTEES  Appointments and resignations; changes in structure or administration and other organizational issues; minutes; oaths of office <b>and board resolutions.</b>	Permanent
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Your consideration of this resolution is appreciated.