Kenai Peninsula Borough
Office of the Borough Clerk
Records Management Division

FORMS MANAGEMENT PROCEDURES

TO: All KPB Employees

EFFECTIVE DATE: February 8, 2018

NEXT REVIEW DATE: April 2020

REVIEWED BY: John Quick, Chief of Staff
Ben Hanson, IT Director
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1. Introduction

The development and standardization of forms and formats within the borough is necessary to eliminate conflicting, duplicate, and obsolete forms, as well as present a clear, uniformed presence to the public we serve.

2. Purpose

To improve data collection, reporting methods, and information management procedures through the standardization and management of forms.

3. Definitions

The following definition applies specifically for the purposes of this Procedure:

3.1   "Forms"

A "form" shall be defined as any form, document, memorandum, letter, email, or method which meets any of the following criteria:

a.) Collects, maintains, or reports items of information per applicable statutes, borough code and policies, management directives, and/or standard operating procedures.

b.) Requests or requires information from the public.

c.) Collects or compiles information for internal processes.

d.) May be in either paper or electronic format.

4. Retention

Completed forms used by the borough become public records. All public records have required retention periods. *See the 'Records Retention Schedule'.*

Blank forms (not filled in) do not require retention.

5. Procedure

The records manager shall consult with each department head to determine informational needs of each department. The borough clerk shall control the creation and use of forms which members of the general public are required to complete. (KPB 2.52.060)

In addition to the standardization of external public-used forms, the administration has requested incorporating the standardization of internal departmental-used forms with this procedure. This collaboration and partnership will ensure a continuing and consistent approach to these procedures.

All standardized forms, templates, font choices and color schematic will be kept on the borough's intranet. All will be in a simple Microsoft Word and/or an Adobe fillable form, when applicable. The forms and template libraries shall be the only forms/formats each department should use. Any other version or variations of these forms/formats should no longer be used. If there is a departmental need that is not present in the libraries on the intranet, please contact the borough clerk or records manager.

6. Design Standards

- The codified borough logo is the official logo of the Kenai Peninsula Borough. (KPB 1.04.050) All other logos are obsolete and should no longer be used, including anniversary logos.

- Borough letterhead and business cards will be created for each department and will mirror the color schematic of the borough's website.

- Email messages sent externally shall bear the employee's name, title and phone number and will be accompanied with the borough's address and logo in the uniformed color schematic. Emails should not have backgrounds, or 'quotes-of-the-day', etc. and shall follow the established font and color schematic.

- Internal email messages do not need to include the established signature block as described above. However, it should be noted that internal emails are also subject to public record laws.

- A public disclosure statement that identifies email correspondence may be subject to public record laws shall be part of the email footer. Whereas the Legal Department email footer will contain an attorney-client privilege statement and the Human Resources Department and Risk Management Division email footers will contain a confidentiality statement. These disclaimers/statements shall be automatically added by the email server.

- Memorandums are to be used as an internal document. A memorandum template will be created for each department. Previous versions and memo formats should no longer be used.

- Limit the use of fonts to one of the following: Century Gothic, Palantino Linotype or Segoe UI for printed materials and Verdana for internet purposes. Only one font style should be used any given document.

- Provide adequate margins on all correspondence for its proper storage and retention. Be aware, most scanners and some desktop printers require a ¾" margin. It is recommended a 1" margin (top/bottom/right/left) be used.

- The header of the forms that requests or requires information from the public must be concise and indicate the purpose and/or function of the form. First line is name of the form; second line is borough's name, followed by the department's name. The borough's address and contact information shall be included thereafter.

- If forms are posted on the departments' public-facing webpage(s) that request or requires information from the public, will be maintained in an easy to complete, fillable .pdf or web-fill format.

- If a form is used as a source document for data entry and/or electronic processing, the form should be designed for that operation and adhere to borough code requirements and the *Records Retention Schedule*.

These procedures supersede any previous procedures issued and approved under KPB 2.52.040.

Wayne H. Ogle, Assembly President   2/8/2018

Wayne H. Ogle, Assembly President   Date