

Kenai Peninsula Borough  
Office of the Borough Clerk  
Records Management Division

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**MEMORANDUM**

**TO:** Wayne Ogle, Assembly President  
Kenai Peninsula Borough Assembly Members

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

**FROM:** Michele Turner, Deputy Clerk / Records Manager (M.T.)

**DATE:** March 5, 2019

**RE:** Annual Records Report to Assembly

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Pursuant to KPB 2.52.030(G), this serves to provide the assembly with our annual report from the Records Department.

In 2018 there were a total of 3,504 files that were removed from active departmental files and archived at the records center. A detailed description by records series is attached for your reference.

Records that were determined to have met their required retention are recapped below:

2018 OBSOLETE RECORDS SCHEDULED FOR DESTRUCTION

Assessing	19 Boxes	
Borough Clerk	22 Boxes	
Finance	22 Boxes	
Human Resources	4 Boxes	
Legal	12 Boxes	
Planning	5 Boxes	
Purchasing & Contracting	9 Boxes	
Risk Management	25 Boxes	
Roads	10 Boxes	
School District	83 Boxes	
Total Boxes	<u>211 Boxes</u>	= 4,350 lbs. of paper

In addition, 182 boxes of records were scanned to electronic files and/or transferred to microfilm and subsequently shredded (3,269 lbs.), totaling 7,619 lbs. of recycled paper.

## 2018 FILES ARCHIVED AT THE RECORDS CENTER

### ASSESSING DEPARTMENT

Record Series	Description	Files Archived
ASG-03	NOTICES OF ASSESSMENT Real and personal property assessment notices, including undeliverables and affidavits of mailings. Includes corrected assessment letters/notices.	59
ASG-06	REAL & PERSONAL PROPERTY – CORRESPONDENCE Routine correspondence on assessment of taxes on real and personal property	116
ASG-12	PROPERTY OWNER ADDRESS CHANGES Address changes of real and personal property owners, and annual lease listings from State and Cities.	97
ASG-14	PROPERTY CARDS – PORTABLE STRUCTURES Property record cards and photos detailing improvements and values for non-land assessed real property, collected as personal property according to KPB 5.12.060.	27
ASG-34	BUSINESS PERSONAL PROPERTY – INACTIVE Fixed assets owned by commercial enterprises for closed/inactive businesses. (Request all active files from ASG-13 to include with inactive history.)	110
ASG-35	BOARD OF EQUALIZATION Corrected assessment letters, appeal log, appeal backup, appeal packets, informal adjustment forms. Board agendas, hearing packets and decisions see CLK-03.	251
ASG-37	SPECIAL ASSESSMENT DISTRICTS – APPROVED/CONSTRUCTED (USAD/RIAD) Records, assessor's maps, engineers estimates, commitment letters, final assessment roll spreadsheets, contracts, invoices/billings, and correspondences pertaining to assembly approved and constructed special assessment districts.	4
ASG-38	SPECIAL ASSESSMENT DISTRICTS – FAILED PROJECTS (USAD/RIAD) Records, assessor's maps, engineers estimates, commitment letters, estimate assessment roll spreadsheets, and correspondences pertaining to failed special assessment districts projects.	1
ASSESSING TOTAL FILES ARCHIVED 2018		665

### CLERK'S OFFICE

CLK-33	ELECTIONS - VOTED BALLOTS All voted ballots including questioned, completed, challenged, rejected, absentee and special needs ballots. Ballot stubs, precinct election certificates, tallies, and receipts for ballots. C = Once election is certified, unless contested and stayed by an order of the court.	31
CLK-36	ELECTIONS - REGISTERS All registers: precinct, questioned and absentee in person. Also includes special needs oath and affidavit envelopes and absentee by mail applications. C = After municipal election has been conducted.	4

CLERK'S OFFICE TOTAL FILES ARCHIVED 2018		35

#### FINANCE DEPARTMENT

Record Series	Description	Files Archived
FIN-12	SPECIAL ASSESSMENT DISTRICTS Reports for Utility Special Assessment Districts (USAD) and Road Improvement Assessment Districts (RIAD). Formation of assessment districts.	20
CSH-07	CASH RECEIPT BOOK Daily reports, booked by month, listing cash received for use of borough-owned facilities and service areas. Filing fees, grant funds received from the state, with deposit slips and receipts attached to report.	5
CSH-08	BACK OFFICE BOOK Annual register of revenues received. Tax system back office reports and daily balancing reports.	12
CSH-17	TAX BILLS – REAL & PERSONAL PROPERTY OVER THE COUNTER Invoices to taxpayers returned with payments. Note: Checks and stubs received by mail are kept electronic in department.	293
DEL-02	TAX FILES – COLLECTION AGENCY Sales tax, judgments, personal property accounts administered under contract/collection agency.	12
DEL-07	PERSONAL PROPERTY / SALES TAX JUDGMENT Personal property and sales tax files containing information obtaining and collecting judgment and satisfaction.	18
DEL-08	SALES TAX FILES – CLOSED ACCOUNTS Sales tax closed delinquent accounts collected without litigation.	1
DEL-09	PROPERTY TAX FILES – CLOSED ACCOUNTS Property tax closed delinquent accounts collected without litigation.	8
DEL-10	LIQUOR LICENSE ADMINISTRATION New applications, renewal or transfers of liquor licenses.	10
DEL-13	SALES TAX AND PERSONAL PROPERTY – UNENFORCEABLE & JUDGMENTS Sales tax and personal property files with unenforceable amounts due and still owing. Judgment Statute of Limitations.	34
DEL-18	BANKRUPTCY ADMINISTRATION Bankruptcies filed and taxes collected during the completion of the bankruptcy process.	12
PAY-05	PAYROLL REPORTS Quarterly 941 reports on FICA/Federal tax.	15
PAY-11	PAYROLL FINAL PROCESSING DOCUMENTS	50
PAY-12	ACCRUALS REPORT – SICK / ANNUAL LEAVE	4
FINANCE DEPARTMENT TOTAL FILES ARCHIVED 2018		494



**HUMAN RESOURCES**

Record Series	Description	Files Archived
PER-01	EMPLOYEE FILES / PERSONNEL FILES Full-time, part-time, on-call/volunteer, assembly members, board and commission members. Contains application/resume, tax forms, payroll deduction authorizations, test and scores, retirement data, references, evaluations, transfers, promotions/demotions, salary increases/decreases, levies/attachments, deferred compensation data, disciplinary actions. Health and benefit enrollment information.	112
PER-02	EMPLOYEE MEDICAL RECORDS Workers' Comp claims (copies), on-the-job accidents (copies), lost time documentation, pre-hire and periodic physical exams, medical history, correspondence with physicians. Family Medical Leave Act (FLMA); medical leave.	103
PER-10	EMPLOYEE BENEFITS Health plan insurance adjustment records and related correspondence. COBRA participant records. Workers' Compensation data and related OSHA reports. Deferred compensation plans. Life insurance; ICMA.	2
HUMAN RESOURCES TOTAL FILES ARCHIVED 2018		217

**PLANNING DEPARTMENT**

Record Series	Description	Files Archived
PLN-07	NATURAL RESOURCE MANAGEMENT Management of oil and gas leases, mining, fisheries, aquatic farming, timber. Water and watershed studies.	6

**PURCHASING AND CONTRACTING**

Record Series	Description	Files Archived
PUR-02	FORMAL SOLICITATIONS Requests for proposals/invitation to bid, solicitation documents, including: all received proposals/bids, intent to award, notice of award, general/special conditions, award authorization, bid tabulations and addenda. (Note: These files may not be destroyed until the associated contract has reached its required retention, see CLK-40.) (Note: Retention for projects completed with Grant Funding is set by the Granting Agency. See ACC-06 and MAY-07.)	57
PWK-02	MAJOR CONSTRUCTION (PRE-CONSTRUCTION) Pre-proposal conference, bidding information, invitation to bid, request for proposal and funding issues. Reports and recommendations from project advisory board and school administration. Contracts with architects and engineers for preparation of project plans, specs, cost estimates. Project planning and design development. Insurance certificates, DCVRs, submittals, Title 36 and permits.  C = Until Project is complete. (Note: Retention for projects completed with Grant Funding is	298

Record Series	Description	Files Archived
	<i>set by the Granting Agency. See ACC-06 and MAY-07.)</i>	
PWK-03	OTHER PURCHASING RECORDS Licensing of borough-owned vehicles, Annual Auction; disposal of fixed assets. (Note: Retention for projects completed with Grant Funding is set by the Granting Agency. See ACC-06 and MAY-07.)	2
PURCHASING AND CONTRACTING TOTAL FILES ARCHIVED 2018		357

#### **RISK MANAGEMENT**

Record Series	Description	Files Archived
RSK-01	INSURANCE POLICIES Original insurance policies for borough liability, Workers' Compensation, health and life insurance for employees of borough, school district and service areas. Real property insurance. Notary bonds for employees.	1
RSK-05	WORKERS' COMPENSATION CLAIMS May include time loss, no time loss, permanent total disability, and fatality cases. Reports of injury, medical reports, correspondence, release agreements, vocational rehabilitation reports/decisions. Second Injury Fund reimbursements.	164
RISK MANAGEMENT TOTAL FILES ARCHIVED 2018		165

#### **KPBSD FINANCE**

Record Series	Description	Files Archived
KSD-01	ACCOUNTS PAYABLE VOUCHER FILES	928
KSD-03	DETAILED CHECK REGISTER	6
KSD-77	E-RATE VENDOR RECORDS	20
KSD-40	CASH RECEIPTS	12
KSD-42	BANK STATEMENTS / CANCELLED CHECKS	22
KSD-43	GRANT MANAGEMENT FILES / ACCOUNTING	75
KSD-07	EMPLOYEE TIMESHEETS	47
KSD-08	EMPLOYEE TIME REPORT	33
KSD-15	DEDUCTION / BENEFIT PREMIUM PAYMENTS	29
KSD-17	LEAVE SLIPS / SHEETS & INSERVICE	23
KSD-18	EMPLOYEE YEAR-TO-DATE LEAVE LETTERS	1

Record Series	Description	Files Archived
KSD-22	MONTHLY TRS CONTRIBUTION REPORT	10
KSD-58	CAPITAL EQUIPMENT / 79-100s FORMS	67
KPBSD FINANCE TOTAL FILES ARCHIVED 2018		1273

#### **KPSSD INSTRUCTIONAL SERVICES**

Record Series	Description	Files Archived
KSD-66	GENERAL	195

#### **KPBSD SCHOOL BOARD ADMINISTRATION**

Record Series	Description	Files Archived
KSD-64	SUPERINTENDENT FILES	65
KSD-65	BOARD MEETING PACKETS	32
KPBSD SCHOOL BOARD ADMIN. FILES ARCHIVED 2018		97

**GRAND-TOTAL FILES ARCHIVED AT THE RECORDS CENTER IN 2018**

**3504**