Village of Menomonee Falls, Wisconsin

GENERAL GOVERNMENT COMMITTEE

MINUTES

Monday, January 5, 2026

Present:	Chairman Paul Tadda; Trustee Ann Lessila
Absent:	Trustee Brad Jubber
Staff Present:	Mark Fitzgerald, Village Manager; Adam Koenings, Village Attorney; Amy Dishinger, Village Clerk; Mark Waters, Police Chief

Motion by Trustee Ann Lessila, second by Chairman Paul Tadda To move item 2. to the beginning of the meeting.

Vote: 2 - 0 Motion Carried

Consideration of approval of the State of Wisconsin's "General Record Schedule - Wisconsin Municipal and Related Records" schedule.

Motion by Trustee Ann Lessila, second by Chairman Paul Tadda to recommend to the Village Board approval of a Resolution amending the Records Retention Schedule for the Village of Menomonee Falls.

Vote: 2 - 0 Motion Carried

Consideration of an Operator's License Application - Clark Kent

Motion by Trustee Ann Lessila, second by Chairman Paul Tadda to recommend to the Village Board denial of an operator's license for Clerk Kent based upon finding that the applicant's 2024 felony conviction for Wis. Stat. 943.201(2)(a) is substantially related to the licensed activity and that the applicant has not provided evidence of rehabilitation and fitness, and based upon the restrictions set forth in Wis. Stat. 125.04(5)(a)1.

Vote: 2 - 0 Motion Carried

ADJOURNMENT

Motion by Trustee Ann Lessila, second by Chairman Paul Tadda to adjourn.

Vote: 2 - 0 Motion Carried

The General Government Committee meeting adjourned at 5:48 pm.

Minutes submitted by Trustee Paul Tadda
Minutes transcribed by Amy Dishinger, Village Clerk

General Government Committee **2.**

Meeting Date: 01/05/2026
Topic: Record Retention Schedule
From: Amy Dishinger, Village Clerk
Department: Clerk Services
Date of Committee Action (if required): 01/05/2026
Date of Village Board Action (if required): 01/05/2026

Information

Subject:

Approval of a Resolution amending the Records Retention Schedule for the Village of Menomonee Falls.

Background Information:

In 2013, the Board of Trustees adopted section 2-186 of the Municipal Code and approved a record retention schedule. Municipal record retention schedules must be approved by the Wisconsin Public Records Board. In 2018, the Public Record Board adopted a general records retention schedule for all municipalities. Moving to the State's schedule for local municipalities will allow us to be more uniform with other municipalities across the state. This schedule will ensure that we 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. This schedule provides agencies with legal authority to dispose of records eligible for disposition on a regularly scheduled basis after the minimum retention period has been met. Records may not be disposed of in a shorter period of time, and promote the cost-effective management of records.

Key Issues for Consideration:

- We are up to get our schedule from 2013 renewed.
- This will help to maintain/destroy records more consistently and efficiently.
- The State has been pushing all municipalities in this direction since 2018 and will no longer accept schedules created by municipalities. If we wish to submit a change, we can do so after adoption.
- Without this schedule, we would not be allowed to destroy any records. This would be very costly on the Village.

Action By Committee or Village Board:

Consideration of approval of the State of Wisconsin's "General Record Schedule - Wisconsin Municipal and Related Records" schedule.

Attachments

Draft Resolution

Municipal GRS6-2020

Letter from DOA for GRS approal

VILLAGE OF MENOMONEE FALLS RESOLUTION NO. ___-R-25

A RESOLUTION AMENDING THE RECORD RETENTION SCHEDULE FOR THE VILLAGE OF MENOMONEE FALLS

WHEREAS, pursuant to Section 2-186 of the Municipal Code the Board of Trustees adopted approved Resolution 988-R-13 adopting a record retention schedule setting forth the minimum time periods for which Village records shall be maintained; and

WHEREAS, in 2018, the State of Wisconsin Public Records Board ("PRB") approved a General Record Schedule for Wisconsin Municipal and Related Records ("Municipal GRS") and encourages municipalities to adopt this record schedule; and

WHEREAS, adoption of the Municipal GRS will bring the Village's records retention policy in alignment with other municipalities throughout the state; and

WHEREAS, Village staff notified the PRB of its intention to adopt the Municipal GRS September 18, 2025 and approval was received on October 21, 2025; and

WHEREAS, the Village Manager and Village Clerk recommend the Board of Trustees adopt the Municipal GRS; and

NOW, THEREFORE, BE IT RESOLVED, by the Board of Trustees of the Village of Menomonee Falls that the Municipal GRS is hereby approved and adopted pursuant to Section 2-186(d)(1) of the Municipal Code.

AND BE IT FURTHER RESOLVED, that this resolution shall take effect and be in full force upon its passage and adoption.

Adopted by the Village Board of Trustees of the Village of Menomonee Falls on the ____ day of _____, 2026.

By: _____
Jeremy Walz, Village President

Attest:_____
Amy Dishinger, Village Clerk

General Records Schedule

Wisconsin Municipal and Related Records

Approved by the Public Records Board:

August 27, 2018

Expiration: August 27, 2028
Revised: June 15, 2020

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

Wisconsin Municipal Records Schedule

Table of Contents

Introduction 3

I. Applicability: 3

II. Purpose: 4

III. Implementation: 4

IV. Using the Schedule: 5

V. Confidential Records and Personally Identifiable Information (PII) 7

VI. Additional Schedules: 8

Administrative Records 9

Cemetery Records 22

Community Development/Public Services 25

Election Records 30

Finance Records 35

Public Works 40

Revenue Records 52

Introduction

Wisconsin Municipal Records Schedule

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:

The WRMS is available for adoption by all Wisconsin cities, villages, and towns; along with other non-county local units of government. County governments should refer to the County General Schedule for their record retention requirements. The WMRS is intended to serve as guidance for records that are created or received by your particular unit. Adopting the schedule does not require local units to begin creating any record series that they currently do not produce.

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.

Adopting the Schedule:

- Submit the original and two copies of the Notification of General Schedules Adoption Form (PRB-002) 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:
All municipalities may adopt the PRB approved General Records Schedules to supplement the WMRS. See Section VI of this instruction for more information.

Specific schedules may also be set by Records Disposition Authorizations (RDAs). Visit the following PRB webpage for more information: Information for Counties and Municipalities

Municipalities that choose not to adopt the WMRS are still required to schedule the destruction of obsolete records through ordinance as stated in Wis. Stat. § 19.21(4). Retention periods that are not specifically set by state statutes CANNOT be scheduled for less than 7 years without approval from the PRB.

IV. Using the Schedule:

The Municipal Schedule is arranged into seven different sections, which include similar types of record series. Sections may be broken down into subsections for easier reference. All individual schedules include the title of a series, description, retention times, confidential status, and information about notifying the Historical Society.
The following is an example of the format:

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 Guidelines for the Permanent Retention of Records for more information.
    - 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 the record series 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 choose to hire an outside vendor to handle the process of disposing of confidential information.
    - **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. Information on transferring records can be found on the Society's webpage pertaining to proper handling of obsolete records.

- Permanent: Records identified as "permanent" have been identified as containing significant historical information and long-term business value. 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). Information on adopting schedules can be found on the PRB Counties and Municipalities Resource Webpage.

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.

Table of Contents

Administrative Records

Wisconsin Municipal Records Schedule

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.

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	Waived
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 years; Event=End date or cancellation of contract	No	Waived
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	Waived
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	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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	Waived
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	Waived
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	Waived
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	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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	Waived
Organizational Chart	Repository of the official organizational structure of offices.	Event; Event=Superseded	No	Waived
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
Press/News Releases	Information about municipality programs and events.	Creation+3 years	No	Notify

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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	Waived
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
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	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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	Waived
Common Council/Board Meeting Minutes	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 Planning[1]				
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	Waived
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	Waived
Disaster Recovery Records	Records created during the disaster recovery process.	Event+3 years; Event=Date recovery effort is complete [2]	No	Waived
Human Resources/Personnel				
Grievance Case File	Records of grievances filed by employees.	Event+7 years; Event=Date grievance is closed	Yes [3]	Waived

[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] Retention is 3 years from the date of the final Financial Services Report when Federal Grant money is involved.
[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]	Waived
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 year; Event=date the vehicle is disposed	No	Waived
Payroll[9]				
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

Table of Contents

Cemetery Records

Wisconsin Municipal Records Schedule

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.

Record Series Title	Series Description	Retention	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. Includes 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	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	Waived
Grave Registration Records	Records that identify the deceased's name, date of death, and internment and location of 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. Include 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)	Waived
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	Confidential	WHS Notification
Report for Final Disposition	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 registrar, but may also be filed with the cemetery to serve as a record of interment. See Wis. Admin. Code § DHS 135.06(1)(a)(1) for more information.	Permanent	No	N/A

Table of Contents

Community Development/Public Services

Wisconsin Municipal Records Schedule

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.

Public Transportation Surveillance Recording records should follow the schedule for Surveillance Recording records found in the *Public Works* section; *Maintenance and Operations* subsection.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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	Confidential	WHS Notification
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	Waived
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)	Waived
Bus Route Schedules and Timetables	Documentation of transit schedules, timetables, routes, and route history.	Event+3 years; Event=Superseded	No	Waived

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

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Curbside Recycling Program	Documentation of the curbside recycling program including policies, procedures, and administration of the program.	Event+7 years; Event=Superseded	No	Waived
Drop Off Site/Recycling Yard Waste	Site operation files and records.	Creation+7 years	No	Waived
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	Waived
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

Table of Contents

Election Records

Wisconsin Municipal Records Schedule

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.

Record Series Title	Series Description	Retention	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
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

[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	Confidential	WHS Notification
Ballots (Unused and related Materials)	Only applies to unused ballots and materials.	Event+3 business days; Event=Completion of all election canvasses [11]	No	Waived
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 (see footnote 3)	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

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

Record Series Title	Series Description	Retention	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)(f).	Event=22 months; Event=Election	No	Waived
Election Voting and Registration Statistics Reports	Reports filed by municipal clerks on registration, voting, and absentee voting.	Event+22 months; Event=Election	No	Waived

Record Series Title	Series Description	Retention	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

Table of Contents

Finance Records

Wisconsin Municipal Records Schedule

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 & Related General Records 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.

Record Series Title	Series Description	Retention	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
Audit Reports	Reports that evaluate the financial holdings of the municipality.	Event+3 years; Event=Final report issued	No	Waived
Budget 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

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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
Payments and Receipts				
Bank Statements and 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

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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
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[13] Some information may qualify for Trade Secret protection per Wis. Stat. § 19.36(5)	Waived

[13] 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.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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

Table of Contents

Public Works

Wisconsin Municipal Records Schedule

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.

Record Series Title	Series Description	Retention	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)).[14]	Event+4 years; Event=Construction completed	No	Waived
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

[14] 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	Confidential	WHS Notification
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+7years; 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 years; Event=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
Municipal 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

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Municipal Construction Plans: Final As-Built Projects (Historically Significant)	Use for historically significant projects. *(Typically large-scale projects. May include construction of a major municipal facility, as well as projects involving facilities significant to the State of WI or United States history; buildings on the State or National Register of Historic Places.)*	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. [15]	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
Municipal 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

[15] 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	Confidential	WHS Notification
Municipal Project Records (Historically Significant)	Use for historically significant projects. *(Projects are typically large-scale and may include new construction of a major municipal facility, as well as projects involving facilities significant to the State of WI or United States history; buildings on the State or National Register of Historic Places.)*	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. [16]	Event+30 years; Event=Completion of the project	Yes [17]	Waived
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

[16] 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.
[17] Patient health care records in this series are confidential per Wis. Stat. § 146.82.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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.[18]	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
Profile and Grade Books	Documentation of landscape and features.	Permanent	No	N/A

[18] 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. Example: Certified survey maps sent to the county register of deeds office for retention under Wis. Stat. § 236.34(2).

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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.[19]	Event+120 days[20] Event=Date of recording (Note: Recordings may be subject to longer retention. See footnote for more information.)[21]	No	Waived
Planning and Zoning				
Aerial Photographs	Aerial photographs used for planning and map creation.	Event; Event=Superseded	No	Notify

[19] The schedule does not apply to footage recorded by police body cameras, patrol dashboard cameras, or any similar police recording device.
[20] 120 days is the time within which a claim may be filed against a governmental body as defined in Wis. Stats. § 893.80.
[21] 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	Confidential	WHS Notification
Annexation Records	Incorporation records such as petitions, hearing testimony and exhibits, court orders, notices, resolutions, and related correspondence.[22]	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. May also include public hearing notice, reports, public hearing documentation, and decision.	Event+7 years; Event=Termination of conditional use permit	No	Waived
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

[22] Records cover proposed incorporations of town areas into cities and villages pursuant to Wis. Stats. §§ 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	Confidential	WHS Notification
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
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

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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
Utilities [23]				
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

[23] 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

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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
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

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Wind Energy System Applications (Approved)	Written record of decision-making relating to applications for a wind energy system. Authority provided by Wis. Admin. Code § PSC 128.34(1)(c).	Event+7 years (Event=Wind energy system decommissioned)	No	Waived
Wind Energy System Applications (Denied)	Written record of decision-making relating to applications for a wind energy system. Authority provided by Wis. Admin. Code § PSC 128.34(1)(b)	Event+7 years (Event=year decision was issued)	No	Waived

Table of Contents

Revenue Records

Wisconsin Municipal Records Schedule

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, 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.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Assessment				
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) [24]	No	Notify
Low Income Property Owner's Certification of Occupancy (PR-231)	Form used to determine property tax exemption as low-income housing, as defined by Wis. Stat. § 70.11(4a).	Event+5 years; Event=Form submitted to local assessor	No	Waived
Master Property Records	Details the appraisal of real property, based on the field inspections of the assessor. Use this schedule for any Master Property Record Cards (PA-500), Agricultural Work Cards (PA-703), or Residential Record Card Inserts.	Event+5 years; Event=Life of structure	No	Notify

[24] Wis. Stat. § 19.21(4)(a) 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	Confidential	WHS Notification
Municipal Assessment Report	Reports a taxation district's annual assessed values. It is a summary of all the Real Estate and Personal Property assessed values for a taxation district as of the close of January 1.	Event+5 years; Event=Final report filed with DOR	No	Waived
Notice of Increased Assessment (PR-301)	Notices sent to property owners informing them of change in valuation from the previous year for any real property. Also includes Notice of Personal Property Assessment (PR-299) and Agricultural Land Conversion Change (PR-298).	Creation+7 years	No	Waived
Occupational Tax Forms (PA-002; PA-006; PA-014)	Forms submitted by property owner/agent regarding iron ore concentrates, coal, and petroleum, to the local assessor.	Event+5 years; Event=Date submitted to assessor	No	Waived
Property Tax Exemption Request (PR-230)	Form used for requesting exemption from property taxes; real and personal property.	Event+6 months; Event=Submission of Taxation District Summary Report to DOR	No	Waived
Request to View Property Notice (PR-300)	Notifies property owner of their rights, options, and responsibilities with regard to view property for assessment.	Event+5 years; Event=Date of assessment	No	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Statement of Assessment (PA-521C)	Report of the aggregate assessed value of all personal and real property.	Event+7 years; Event=Form submitted to DOR	No	Waived
Statement of Personal Property (PA-003)	Statements filed with local assessor declaring taxable personal property.	Creation+5 years	Yes Confidential per Wis. Stat. § 70.35(3)	Waived
Tax Exemption Reports (PC-220)	Reports filed by individuals who own property exempt from personal property tax under Wis. Stat. § 70.11. The reports are submitted to the municipal clerk. Use this schedule for Multi-Parcel Tax Exemption Reports (PC-220A).	Event+6 months; Event=Submission of Taxation District Exemption Summary Report to DOR	No	Waived
Taxation District Exemption Summary Reports (PC-226)	Reports the total number of exempt properties by purpose and value. Compiled from Tax Exemption and Multi-Parcel Tax Exemption Reports.	Event+2 years; Event=Report submitted to DOR	No	Waived
Board of Review				
Board of Review Support Materials	Includes notes taken by clerk, written objections and all other materials submitted to the board of review, audio recordings, and any transcripts of board of review proceedings. Authority provided by Wis. Stat. § 70.47(8)(f).	Event+7 years; Event=Final action of Board of Review or completion of appeal	No	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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	Waived
Minutes of the Board of Review Proceedings	Record of all proceedings of the board of review. Also includes the Summary of Board of Review Proceedings (PA-800) Authority provided by Wis. Stat. § 70.47(5).	Creation+7 years	No	Notify
Notice of Board of Review 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	Waived
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	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Preliminary Resolutions	Issued by municipal district describing the purpose of the project, calculations, limits of assessment district, and number of installments to be paid. See Wis. Stat. § 66.0703(4) for more information.	Creation+2 years (provided report is on file with public works project record)	No	Waived
Report of Special Assessment	Report of project that includes plans, specifications, cost estimates, and property affected. See Wis. Stats. §§ 66.0703(5)-(6) for more information.	Creation+2 years (provided report is on file with public works project record)	No	Waived
Tax Calculation and Collection				
Escrow Account List	List of real estate taxes paid directly from an escrow account.	Event; Event=Superseded	No	Waived
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

Record Series Title	Series Description	Retention	Confidential	WHS Notification
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	Waived
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	Waived
Tax Settlements	Used to verify tax collections compared to the taxes levied in the municipal records.	Event+7 years; Event=Audit	No	Waived
Unpaid Tax Statements	List of postponed real property, delinquent real property, and delinquent personal property taxes.	Creation+15 years (Retain with tax roll)	No	Waived

Table of Contents

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
PUBLIC RECORDS BOARD
PRB-002 (R08/2023)

COPY

Notification of General Records Schedule Adoption

General Records Schedule Title: General Records Schedule - Wisconsin Municipal and Related Records Date: 9/18/2025

Instructions: Complete page 1 of form then mail signed 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 Unit: Village of Menomonee Falls, Waukesha County
Mailing Address: W156N8480 Pilgrim Rd., Meomonee Falls,WI 53051

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:

Designated Authority Representative Signature: Mark Fitzgerald	Date Signed: 9/18/25
Records Officer or Records Custodian Signature: Amy Dishuyer	Date Signed: 9/18/25

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: Alan Nichols	Date Signed: OCT 01 2025
PRB Executive Secretary Signature: Tony Brasunas	Date Signed: 10/21/25

General Government Committee **1.**

Meeting Date:	01/05/2026
Topic:	Operator's License Application - Clark Kent
From:	Amy Dishinger, Village Clerk
Department:	Clerk Services
Presenter:	Police Department Representative
Date of Committee Action (if required):	01/05/2026
Date of Village Board Action (if required):	01/05/2026

Information

Subject:

Consideration of an Operator's License Application - Clark Kent

Background Information:

See attachments.

Key Issues for Consideration:

Action By Committee or Village Board:

Attachments