

	TRAVIS COUNTY ESD #5 MANCHACA FIRE RESCUE Department Policy / Best Practices	00-RMS
	Authorized by:  Fire Chief Chris Barron	Effective: Immediately Rescinds: N/A Reference: Application:
Records Retention Policy		

I. Purpose

The Travis County Emergency Services District No. 5’s record management and retention plan is committed to efficient, organized and a cost effective method of managing the District’s records.

II. Background

TCESD5 has a need to keep records typically associated with other government entities. The ESD maintains/stores records related to tax rates, resolutions, and human resources in electronic and/or paper format. The ESD is making every effort to reduce the amount of paper the district stores in file cabinets, and other means of storage.

III. Policy/Best Practices

A. Purpose

1. The purpose of the ESD’s record management and retention program is to:
 - a. Ensure all records of the ESD are maintained, stored, and destroyed in accordance with a written policy which is understood and implemented by all ESD personnel;
 - b. Provide an organized method to quickly search and locate records;
 - c. Permit the ESD personnel and community to access appropriate records in a timely manner;
 - d. Assist with the needs of persons who have a use for such records;
 - e. Reduce the amount of storage space required to store active and inactive records;
 - f. Preserve records of historical importance for the department and community;
 - g. Permit for the annual destruction of records no longer required to be maintained

IV. Procedure

A. Records Retention

1. Records retention schedule
 - a. ESD5 will preserve records electronically and physically for a period of 7 years.
 - b. Employee/member records will be kept forever

- c. Financial audits will be kept 10 years

2. Categorization of Records

TCESD5 will categorize records based on type with the following categories

- a. PTAX – Records associated with annual property taxes
- b. STAX – Records associated with annual sales taxes
- c. RES – Resolutions adopted by the ESD
- d. LOAN – Loan documents
- e. PERS – Personnel documents
- f. PAY – Payroll documents including payroll journals, TWC reports, etc
- g. BSTMT – Bank statements
- h. BUDG- Annual budgets and amendment documents
- i. AUD – Annual audits
- j. MIN – Minutes of the ESD meetings
- k. CON – Contracts
- l. APP – Apparatus bids/awards
- m. COMMTRN – Commissioner training documents
- n. TRN – Training documents
- o. ISO – ISO PPC evaluation documents and classification
- p. TCFP – Documents related to TCFP inspections
- q. LAW - Lawsuits

3. Disposal of records

- a. Physical records will be shredded if information contained in it includes, financial or personal information
- b. Digital records will be cleared from server hard drives and back up locations

B. Records Management

The ESD board shall appoint the Chief or other board member responsible for the records management and disposal to coincide with the records retention schedule.

Records shall be kept in a secured area of the building and in a management accessible area of the department's hard drive

- 1. Records shall be stored on department hard drives and backed up on a nightly basis
- 2. Once a year, the records retention schedule shall be reviewed and records destroyed according to the disposal plan