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Schedule No. **9**

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# Conservation District Records Schedule

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Montana Local Government Records Committee  
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RM60\* and RM88\* are records disposal forms issued by the Local Government Records Committee to document records disposal. RM60\* is required if records are not confidential and over 10 years old. RM88\* can be used if the records are either confidential or less than 10 years old. You can find these forms at the Secretary of State's website.

## **Before You Shred, Think Ahead**

### **Introduction to Public Records Management**

All public records have a specific value—whether administrative, fiscal, legal, historical, transitory (short-term) and whether created internally or received from an outside source. Some of them are so vital to an agency's operation, that they must be preserved for perpetuity or protected to ensure continuity. Every governmental agency including a conservation district (CD) is legally required to manage its public records in an orderly and systematic way.

### **Conservation Districts Legal Responsibility**

To assist with the management, retention and disposal of public records, a *Conservation District Records Schedule #9* was developed in 1998. The retention schedule categorizes types of documents, states how long each one must be kept, and provides guidance for preservation or disposal.

When records have met the legal requirements and the CD office no longer needs access, they can be disposed of, deleted, or possibly offered to state archives (see instructions below). In addition to the Conservation District's Board of Supervisors approval, the CD must also secure written authorization from the Montana Local Government Records Committee.

### **Disposition & Destruction of Public Records**

There are two different legal procedures that a CD must follow before it disposes of its public records. The first relates to records under ten years old. The second process relates to documents exceeding the ten-year retention limit.

- **Records Under Ten Years:** *Conservation District Records Schedule #9* dictates how long a record must be kept before destruction or transfer. Before any action is taken, the CD must complete the *Request for Records Disposal or Transfer Authorization* form and submit it to the Montana Department of Administration, Local Government Services Bureau, PO Box 200547, Helena, MT 59620-0547. A template disposal form is located at [Request for Records Disposal](#). [Instructions](#) for completing the form are also available.

Once approved by the Local Government Services Bureau and the Montana Historical Society, the form will be returned to you. You may then dispose of approved items ***that are not ten years old or older***. Complete and file the form after adding destruction completion signature and date.

- **Records Over Ten Years:** If the CD has records older than 10 years the process changes because by [Law 2-6-1205 MCA](#) non-confidential records must be held for 60 days before they are destroyed. The 60-day notice alerts entities like Montana Historical Society-State Archives, colleges/universities, historical museums, genealogy

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societies, and the general public who may want to obtain those documents.

To activate the 60 day notice, the CD must complete the *Request for Records Disposal or Transfer Authorization form*. See the [Instructions](#) to complete the form. Once completed, email it to the Local Government Records Committee ([SOSLocalGovtRecCom@mt.gov](mailto:SOSLocalGovtRecCom@mt.gov)) or mail it to the Local Government Services Bureau, PO Box 200547, Helena, MT 59620-0547. All records over ten years will be posted on the Local Government Records list-serve for the 60-day notice period.

If the CD is contacted during the 60-day period, it must transfer the record(s) to the requesting party in the priority order shown in MCA 2-6-1205. The requesting party is required to pay all costs associated with the transfer. If no one has requested the records after the 60-day period they can be destroyed or deleted, and the Request should be signed off by the person conducting final removal. Approved disposal request forms must be maintained by each CD for 30 years.

The Local Government Records Committee recommends that each local government agency adopt a policy to manage multiple requests for the same record(s).

### **Technical Assistance**

All requests for technical assistance should be emailed to [SOSLocalGovtRecCom@mt.gov](mailto:SOSLocalGovtRecCom@mt.gov).

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MONTANA LOCAL GOVERNMENT RETENTION AND DISPOSITION SCHEDULE

Schedule for: **CONSERVATION DISTRICTS**

See also the General Records Retention Schedule (schedule no1) for those records common to all offices, such as correspondence and subject files.

<b>ADMINISTRATIVE RECORDS</b>		
<b>Record Series Title and Description</b>	<b>Retention and Disposition</b>	<b>Citation/Comments</b>
1 BOARD AGENDA PACKETS Agenda packets containing material the board members use in making decisions	Permanent (1 copy only; other copies as long as needed)	
2 BOARD OF SUPERVISORS / ADVISORY COUNCILS / COMMISSIONS MINUTES a. Keep one copy in the district b. Send one copy to DNRC	a. Retain as long as needed  b. Permanent	DNRC offers paper copies to the State Archives and keeps an electronic copy  a. <b>NO RM60 REQUIRED</b>
3 BOARD POLICIES	Permanent (1 copy only; other copies until superseded)	
4 MASTER LIST OF BOARD OF SUPERVISORS / ADVISORY COUNCILS / COMMISSION  a. Board of Supervisors (elected) b. Advisory Councils/Commission, appointment list	a. Permanent. Clerk of Records Office b. Retain as long as needed.	

<b>DISTRICT RECORDS</b>		
<b>Record Series Title and Description</b>	<b>Retention and Disposition</b>	<b>Citation/Comments</b>
5 AERIAL PHOTOGRAPHS FOR CONSERVATION DISTRICT PROJECTS	Permanent	
6 ANNUAL PLAN		
a. District Copy	a. Retain as needed	
b. DNRC copy	b. Permanent	Send electronic copy to DNRC
7 ANNUAL REPORT		
a. District copy	a. Retain at least 3 years; destroy	Make sure DNRC has copies
b. DNRC copy	b. Permanent	of plans before
		destroying
		a. <b>NO RM60 REQUIRED</b>

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<p>8 DOCUMENTATION ABOUT FORMATION OF THE DISTRICT</p> <p>a. District copy b. DNRC copy</p>	<p>a. Permanent b. Permanent</p>	
<p>9 GRANT/CONTRACT FILES</p> <p>Grants awarded to a conservation district fund programs, projects (educational, restoration, reclamation), feasibility studies, and demonstration projects.</p>	<p>a. Retain all documents for 8 years after grant terminates.</p> <p>b. Permanent:</p> <ul style="list-style-type: none"> <li>• Feasibility Studies</li> <li>• Demonstration Project Data</li> <li>• Engineering Reports</li> <li>• River Stream Projects</li> <li>• Scientific Reports</li> <li>• Project Photos</li> </ul>	<p>a. <b>NO RM60 REQUIRED</b></p>
<p>10 NEWSLETTERS</p> <p>a. District's own newsletter b. Other newsletters</p>	<p>a. Permanent (1 copy) b. Retain as long as needed and then destroy</p>	<p>a. Offer one copy to the Montana Historical Society Library b. <b>NO RM60 REQUIRED</b></p>
<p>11 PERMITTING FILES (310 FILES)</p> <p>Permits issued by the district under the Natural Streambed and Land Preservation Act of 1975; may include:</p> <ul style="list-style-type: none"> <li>• Application (also called Notice of Proposed Project)</li> <li>• Supervisor's Decision (also called Board's Decision)</li> <li>• Team member report</li> <li>• Inspection form</li> <li>• Correspondence</li> <li>• Maps, diagrams, photographs</li> </ul>	<p>a. Retain 5 years after completion; destroy,</p> <p>b. Keep significant permits permanently. Consult with Local Board of Supervisors</p>	<p>a. Offer to DNRC and the State Archives.</p> <p><b>NO RM60 REQUIRED</b></p>
<p>12 NON-GRANT PROGRAM/PROJECT FILES</p> <p>Examples include:</p> <ul style="list-style-type: none"> <li>• Outdoor Classroom</li> <li>• Shelterbelt</li> <li>• Cost-Share</li> <li>• Youth and Adult Conservation</li> </ul>	<p>Keep at the discretion of the conservation district board</p>	<p>Offer to the State Archives</p>

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<p>13. CONSERVATION DISTRICT WATER RESERVATION FILES</p> <p>These files include:</p> <ul style="list-style-type: none"> <li>• Conservation district applications and maps</li> <li>• Board of Natural Resources Order</li> <li>• Individual water reservation applications and authorizations</li> </ul>	<p>Permanent</p>	
<p>14 Audit Reports</p> <p>a. District Copy</p> <p>b. Department of Administration copy</p>	<p>a. 8 years; if copy does not go to DOA, District should keep it permanent</p> <p>b. Permanent</p>	

**General FINANCE RECORDS (see schedule 5)**

**General PERSONNEL RECORDS (see Schedule 24)**

<i>Revisions to Schedule</i>		
Date	Page	Change
5-2012	<p>1 &amp; 2 CD1</p> <p>CD4 CD5</p>	<p>Added <b><u>Think Ahead Before You Shred.</u></b></p> <p>Amended <b><u>Grant Files</u></b> (item 9) - updated wording to include Grant Information.</p> <p>Deleted <b><u>Grant Information</u></b> (item 29).</p> <p>Added <b><u>Finance Records – Vendors</u></b> which includes the <b>1099 Form</b> and <b>W-9 Form</b>. The LGRC did not feel the 1096 Form needed to be listed since it’s just an annual report of the 1099’s.</p>
4-2017	various	Added “NO RM60 REQUIRED” to comments as appropriate.
7-2020	<p>1</p> <p>2</p>	<p>Clarification of series title in item 2, <b>Minutes</b> and 4, <b>Master List</b> to allow for various regional organizational structures.</p> <p>Delineate permanent elements to keep in item 9, <b>Grants files</b>. Delineate elements of item 11-13, <b>Permit Files, Non-</b></p>

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	3	<b>grant Subject Files and Conservation District Water Reservation</b> Files, respectively. <b>General Finance and Personnel</b> no longer listed, but instead simply linked to GS 5 and 24, respectively.
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