

# STATE OF VERMONT GENERAL RECORD SCHEDULE

Issued to: All Public Agencies

GRS-2084.1102: Public Body Administrative Records

Last Revised: 6/14/2024



Vermont State Archives and Records Administration

Vermont Office of the Secretary of State

## GRS-2084.1102: Public Body Administrative Records

Classification: Public bodies (Administering)

- Authority:** A custodian of public records shall not destroy, give away, sell, discard, or damage any record or records in his or her charge, unless specifically authorized by law or under a record schedule, as defined in 3 V.S.A. § 117(a)(6), that has been approved by the State Archivist. (1 V.S.A. § 317a)
- Scope:** This general record schedule (GRS) applies to any public agency, meaning any agency, board, department, commission, committee, branch, instrumentality, or authority of the state or any agency, board, committee, department, branch, instrumentality, commission, or authority of any political subdivision of the State, that produces or acquires the records listed on this record schedule in the course of public agency business. Record means any written or recorded information, regardless of physical form or characteristics, and includes electronic or digital records and data. (1 V.S.A. § 317)
- Use:** Any public agency using this GRS must establish internal policies for applying the requirements in the GRS within the agency. GRS numbers shall be cited in all internal policies to demonstrate compliance with 1 V.S.A. § 317a. If this GRS does not meet an agency's legal or administrative needs for the records listed on this record schedule, the agency should seek an agency specific record schedule through the Vermont State Archives and Records Administration's Targeted Assistance Program (TAP).
- Exemptions:** It is the policy of Title 1, Chapter 5, Subchapter 3 of Vermont Statutes Annotated to provide for free and open examination of records consistent with Chapter 1, Article 6 of the Vermont Constitution. All people, however, have a right to privacy in their personal and economic pursuits, which ought to be protected unless specific information is needed to review the action of a governmental officer. Some records listed on GRS-2084.1102 may be exempt from public inspection and copying for this reason. Security measures to protect records and information from unauthorized access, use, and disclosure are necessary if the records are exempt pursuant to 1 V.S.A. §§ 315-320. Please see Appendix B for Access Requirements and Appendix E for related legal references regarding exemptions from public inspection and copying.
- Retention:** GRS-2084.1102 reflects the retention and disposition requirements for the following records regardless of their media, format, or mode of transmission. Duplicate records within the same agency that are used for specific legal, fiscal, or administrative purposes may be either retained using the retention requirement listed in this schedule or in accordance to an internal policy. Any copies of records made only for convenience of reference or informational purposes may be discarded when no longer needed unless otherwise directed through an internal policy. Duplicates or copies of records shall not be retained longer than the original records.

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Classification: Public bodies (Administering)

*GRS-2084.1102: This schedule is reserved for recorded evidence of activities and transactions that relate to or affect, in a specific manner, administering the business of a public body as defined in 1 V.S.A. § 310. For public bodies with rulemaking authority pursuant to the Administrative Procedures Act, see also GRS-2087.1128: Administrative procedures (Rulemaking).*

**Retention:** Administrative records shall be retained by public bodies as specified in this schedule.

Records appraised as permanent (archival) shall be retained permanently and are eligible for transfer to the Vermont State Archives and Records Administration (state government only) when retention requirements have been met.

Transitory records created or received by a public body shall be weeded as appropriate in accordance with the Transitory Record Schedule (GRS-1000.1000 or the public body's SRS- equivalent).

**MINIMUM RECORDKEEPING REQUIREMENTS for Public Body Administrative Records (see APPENDIX E for related legal references)**

<b>Record Category/Type:</b>	<b>Applicability/Use:</b>	<b>Appraised Value:</b>	<b>Minimum Retention/Disposition:</b>
<b>GRS-2084.1102.138</b> <b>Accounts (Statements)</b> Public Access: <i>Review</i>	Use for electronic recordings of public meetings and hearings that are required by law. Starting date of retention period is based on the day the conditions or requirements set forth in law for the recording are satisfied and complete. If the approved and posted official minutes do not give a true indication of the business of the meeting or hearing or if the recording is administratively significant, use "Minutes."	Temporary (Legal)	RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)
<b>GRS-2084.1102.4</b> <b>Agendas</b> Public Access: <i>Review</i>	Use for written lists of items to be considered at public meetings and hearings as required by 1 V.S.A. § 312, including supporting material. If the approved and posted official minutes do not give a true indication of the published agenda of the meeting or hearing, use "Minutes."	Temporary (Legal)	RETAIN UNTIL: Calendar Year Ends PLUS: 1 Year(s) THEN: Destroy (General)
<b>GRS-2084.1102.5</b> <b>Agreements</b> Public Access: <i>Review</i>	Use for formal written agreements regarding a course of action. Includes significant supporting material. For agreements related to government awards, use "Grants."	Conditional Archival	RETAIN UNTIL: Expired PLUS: 3 Year(s) THEN: Confirm
<b>GRS-2084.1102.141</b> <b>Authorizations</b> Public Access: <i>Review</i>	Use for written permissions granted in accordance with law or by a competent authority body to engage in some transaction, business, or occupation, or to do some act that relates to administering the business of public bodies. Includes formal written findings and announcements for meetings held during local incidents.	Permanent (Archival)	RETAIN UNTIL: Expired PLUS: 3 Year(s) THEN: Archives

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<p><b>GRS-2084.1102.19</b> <b>Calendars</b> Public Access: <i>Review</i></p>	<p>Use for schedules of the time and place of all regular meetings; the time, place, and purpose of special meetings; and all other meetings and events of public bodies.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Calendar Year Ends PLUS: 1 Year(s) THEN: Destroy (General)</p>
<p><b>GRS-2084.1102.53</b> <b>Correspondence (Substantive)</b> Public Access: <i>Review</i></p>	<p>Use for any correspondence produced or acquired by during the course of public body business that have significant administrative value, including the fomulation or development of policy. Includes opinions, memoranda of decisions, and significant supporting material.</p>	<p>Permanent (Archival)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 3 Year(s) THEN: Archives</p>
<p><b>GRS-2084.1102.133</b> <b>Decisions</b> Public Access: <i>Review</i></p>	<p>Use for written decisions issued by public bodies in connection with a quasi-judicial proceeding.</p>	<p>Permanent (Archival)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 3 Year(s) THEN: Archives</p>
<p><b>GRS-2084.1102.32</b> <b>Declarations</b> Public Access: <i>Review</i></p>	<p>Use for official statements produced or acquired that formally set forth the basis of authority and scope of public body business activities and define the obligations, liabilities, duties, and rights of those affected. Includes significant supporting material.</p>	<p>Permanent (Archival)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 3 Year(s) THEN: Archives</p>
<p><b>GRS-2084.1102.173</b> <b>Grants</b> Public Access: <i>Review</i></p>	<p>Use for documentation of awards of financial assistance from a government agency to carry out a public purpose of support or stimulation authorized by a law. Includes cost reimbursement contracts and other agreements. Starting date of retention period is based on the day the single or last expenditure report is submitted to the awarding agency for the funding period specified in the grant award. For grant proposals and reports that have significant administrative value, use "Reports."</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 3 Year(s) THEN: Destroy (General)</p>
<p><b>GRS-2084.1102.59</b> <b>Minutes</b> Public Access: <i>Review</i></p>	<p>Use for records of what was said and done at public meetings and hearings as required by 1 V.S.A. § 312. Includes written testimony and significant supporting material.</p>	<p>Permanent (Archival)</p>	<p>RETAIN UNTIL: Calendar Year Ends PLUS: 3 Year(s) THEN: Archives</p>
<p><b>GRS-2084.1102.50</b> <b>Notices, Legal</b> Public Access: <i>Review</i></p>	<p>Use for official, written statements, notices, or announcements that are required by law.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 1 Year(s) THEN: Destroy (General)</p>

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<p><b>GRS-2084.1102.69</b>  <b>Plans (reports)</b>  Public Access: <i>Review</i></p>	<p>Use for strategic plans and similar planning documents that document goals, objectives and plans for the future. Includes significant supporting material.</p>	<p>Permanent (Archival)</p>	<p>RETAIN UNTIL: Superseded  PLUS: 3 Year(s)  THEN: Archives</p>
<p><b>GRS-2084.1102.70</b>  <b>Policies</b>  Public Access: <i>Review</i></p>	<p>Use for written statements that outline guiding principles or general courses of action, including the formulation or development of policy. Includes significant supporting material.</p>	<p>Conditional Archival</p>	<p>RETAIN UNTIL: Superseded  PLUS: 3 Year(s)  THEN: Confirm</p>
<p><b>GRS-2084.1102.72</b>  <b>Press releases</b>  Public Access: <i>Review</i></p>	<p>Use for official statements distributed to the press that relate to the administration of public body business, including the fomulation or development of policy.</p>	<p>Temporary (Administrative)</p>	<p>RETAIN UNTIL: Calendar Year Ends  PLUS: 1 Year(s)  THEN: Destroy (General)</p>
<p><b>GRS-2084.1102.73</b>  <b>Procedures</b>  Public Access: <i>Review</i></p>	<p>Use for sets of substantive instructions or procedures that govern the administration of public body business, including the fomulation or development of policy. Does not include rules adopted pursuant to the Administrative Procedure Act.</p>	<p>Conditional Archival</p>	<p>RETAIN UNTIL: Superseded  PLUS: 3 Year(s)  THEN: Confirm</p>
<p><b>GRS-2084.1102.144</b>  <b>Reports</b>  Public Access: <i>Review</i></p>	<p>Use for annual and similar reports, usually required by State or Federal law, documenting administrative activities and accomplishments. Includes significant supporting material.</p>	<p>Permanent (Archival)</p>	<p>RETAIN UNTIL: Completed/Closed  PLUS: 3 Year(s)  THEN: Archives</p>
<p><b>GRS-2084.1102.139</b>  <b>Requests</b>  Public Access: <i>Review</i></p>	<p>Use for written requests from individuals to receive notifications of special meetings.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Obsolete  PLUS: 0 Year(s)  THEN: Destroy (General)</p>
<p><b>GRS-2084.1102.116</b>  <b>Studies</b>  Public Access: <i>General</i></p>	<p>Use for studies that relate to the administration of public body business, including the fomulation or development of policy. Includes significant supporting material.</p>	<p>Permanent (Archival)</p>	<p>RETAIN UNTIL: Completed/Closed  PLUS: 3 Year(s)  THEN: Archives</p>
<p><b>GRS-2084.1102.150</b>  <b>Waivers</b>  Public Access: <i>Review</i></p>	<p>Use for waivers received from a superior authority to waive provisions in a policy, regulation, or other requirement related to the administration of public body business.</p>	<p>Conditional Archival</p>	<p>RETAIN UNTIL: Expired  PLUS: 3 Year(s)  THEN: Confirm</p>

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## Appendix A: Appraisal Values

*An appraisal value establishes the usefulness or importance of a record after its original purpose has passed. The value of a record also dictates how it must be disposed after retention requirements are met (also see "Retention Requirements"). The appraisal values below represent categories of values that may be assigned to records following the record appraisal process. See "Vermont Archival Records" in the Archives and Records Management Handbook for conditions a record must meet to be appraised as "archival."*

Appraisal Value	Description	Usage
Conditional Archival	Records may have archival value.	Assigned to records that meet the conditions of a "Vermont Archival Record" under special conditions.
Permanent (Archival)	Records have archival value.	Assigned to records that meet the conditions of a "Vermont Archival Record" and are therefore permanent (archival) records.
Temporary (Administrative)	Records have temporary administrative value.	Assigned to records that do not meet the conditions of a "Vermont Archival Record" but are needed for administrative reasons.
Temporary (Legal)	Records have temporary legal value.	Assigned to records that do not meet the conditions of a "Vermont Archival Record" but have legal requirements governing their retention.
Unappraised	Default value for records that have not been appraised.	Assigned to records that have not been appraised and do not yet have retention or disposition requirements.

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## Appendix B: Public Access Requirements

*A public access requirement is the availability of a record for public use and inspection pursuant to 1 V.S.A. §§ 315-320. Unless exempt from public inspection and copying pursuant to 1 V.S.A. § 317, records are expected to be promptly produced for public inspection upon request. Public agencies shall follow the procedure outlined in 1 V.S.A. § 318. The access requirements below represent actions agencies must take based on specific laws associated with the accessibility of their records. With general record schedules, the default requirement is always REVIEW unless it is clear that certain records or information within a record are exempt from public use and inspection pursuant to 1 V.S.A. § 317. Agencies using general record schedules should defer to their internal policies for specific access requirements.*

Access	Description	Usage
Exempt	Records shall not be provided for free and open examination pursuant to 1 V.S.A. §§ 315-320.	Assigned to records that are wholly exempt from public use and inspection pursuant to 1 V.S.A. § 317.
General	Records may be provided for free and open examination pursuant to 1 V.S.A. §§ 315-320.	Assigned to records that are not exempt from public inspection and copying pursuant to 1 V.S.A. § 317.
Redact	Records contain specific information that shall not be provided for free and open examination pursuant to 1 V.S.A. §§ 315-320.	Assigned to records that contain specific information that is exempt from public inspection and copying pursuant to 1 V.S.A. § 317 and require exempt information to be redacted from the records prior to public use, inspection and/or copying.
Review	Records may be provided for free and open examination pursuant to 1 V.S.A. §§ 315-320 but not always. Default value for general schedules, which require agencies to establish internal policies.	Assigned to records that are generally not exempt from public inspection and copying pursuant to 1 V.S.A. § 317 but, in limited circumstances, may be exempt. Internal review and/or policy is required.

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## Appendix C: Retention Requirements

*A retention requirement is the length of time a record must be retained by an agency before it may be destroyed or transferred to the State Archives or an agency archives (also see "Disposition Requirements"). The retention requirements below represent events or triggers that cause records to move from an active to inactive state. An "event" is tied to a specific time requirement: i.e. Retain Until "Calendar Year Ends" PLUS 3 Years.*

Retention	Description	Usage
Audit Complete	Retain until an audit or verification is complete.	Assigned to records that are actively used or needed until the information contained therein has been audited or verified.
Calendar Year Ends	Retain until the end of the calendar year.	Assigned to records that are actively used or needed until the end of the calendar year.
Completed/Closed	Retain until the activity or process supported by the record is completed.	Assigned to records that are actively used or needed until the activity is formally completed, closed, or finalized (includes appeals).
Expired	Retain until the conditions or requirements supported by the record are satisfied and no further action is needed.	Assigned to records that are actively used or needed until the conditions or requirements are satisfied and complete.
Fiscal Year Ends	Retain until the end of the fiscal year.	Assigned to records that are actively used or needed until the end of the fiscal year.
Life of Asset Ends	Retain for the life of the person, structure, object, organization, etc. that is the subject of the record.	Assigned to records that are actively used or needed for the life of person, structure, object, organization, etc.
Obsolete	Retain until the record is no longer needed and is valueless.	Assigned to records that have limited administrative value and may be purged when they no longer have any administrative value. Agency must develop internal policy that states when records no longer have administrative value.
Superseded	Retain until the record is superseded, updated, or revised.	Assigned to records that will be superseded, updated, or revised.

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## Appendix D: Disposition Requirements

*A disposition requirement is how an agency must dispose of a record from its legal custody once retention requirements have been met. Disposition is based on the record's appraisal value. If the record has been appraised as non-archival it will be destroyed after retention requirements are met. If appraised as archival the record will be transferred to the State Archives or agency archives for permanent preservation and access. The disposition requirements below represent actions that an agency must take once a record has met its retention requirements.*

Disposition	Description	Usage
Archives	Retain permanently. These records are eligible for transfer to the State Archives or agency archives.	Assigned to records that have been appraised as having archival value and are therefore permanent records.
Confirm	Confirm disposition with the Vermont State Archives and Records Administration after retention requirement has been met.	Assigned to records that are maintained in a centralized database or information system or are appraised as conditional archival.
Destroy (General)	Destroy by recycling or deleting the record.	Assigned to records that have been appraised as non-archival and are not exempt from public access. Agency discretion advised for general record schedules.
Destroy (Shred)	Destroy by shredding (includes electronic shredding).	Assigned to records that have been appraised as non-archival and are exempt from public access or contain sensitive information.
Unappraised	Default value for records that have not been appraised.	Assigned to records that have not been appraised and do not yet have retention or disposition requirements.
Weed	Separate records that meet the conditions of a "Vermont Archival Record" from those that do not (temporary).	Assigned to records that have been appraised as conditional archival. Upon weeding the temporary records from the archival records, transfer archival records to Archives and destroy temporary records.



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## Appendix E: Legal References

GRS-2084.1102: Public Body Administrative Records		<i>Review for Exemption?</i>
1 V.S.A. § 310	Definitions [related to public information]	No
1 V.S.A. § 311	Declaration of public policy; short title	No
1 V.S.A. § 312	Right to attend meetings of public agencies	Yes
1 V.S.A. § 312a	Meetings of public bodies; state of emergency	No
1 V.S.A. § 313	Executive sessions	Yes
1 V.S.A. § 314	Penalty and enforcement [related to public information]	No
1 V.S.A. § 315	Statement of policy; short title [related to access to public records]	Yes
1 V.S.A. § 316	Access to public records and documents	No
1 V.S.A. § 317	Definitions; public agency; public records and documents; exemptions	Yes
1 V.S.A. § 318	Procedure [related to access to public records]	No
1 V.S.A. § 319	Enforcement [related to access to public records]	No
1 V.S.A. § 320	Penalties [related to access to public records]	No
17 V.S.A. § 2640	Annual meetings	No
17 V.S.A. § 2680	Australian ballot system; general	No
24 V.S.A. § 1173	Town or village reports	No