



Continuous Improvement Record Retention Project

CI Project Background

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- Project initiated April 2020 by Deputy Corporation Counsel Paul Kuglitsch

Problem Statement:

Milwaukee County currently lacks an approved retention schedule and is therefore bound by the default 7-year retention period. Records retained beyond the legal minimum retention period are incurring unnecessary record storage costs.

Project Goals:

1. Adoption of the County General Retention/Disposition Schedule
2. Destruction of eligible records, resulting in long term cost savings in storage fees



Project Benefits



- Milwaukee County must comply with WI record retention laws. Improved records retention practices will benefit:
 - Continuity of operations
 - Provision of public access to government records
 - Mitigation of risk
 - Preservation of history
 - and may ultimately lead to significant cost savings.
- The primary aims of the County General Records Retention Schedule are:
 - To provide clear guidance regarding how long to keep records and what to do with those records once that time has passed
 - Eliminate the need for individual counties to develop their own records retention/disposition schedule
 - Facilitate uniformity across Wisconsin's 72 counties
 - and promote the effective and resource-efficient retention and disposition of records.

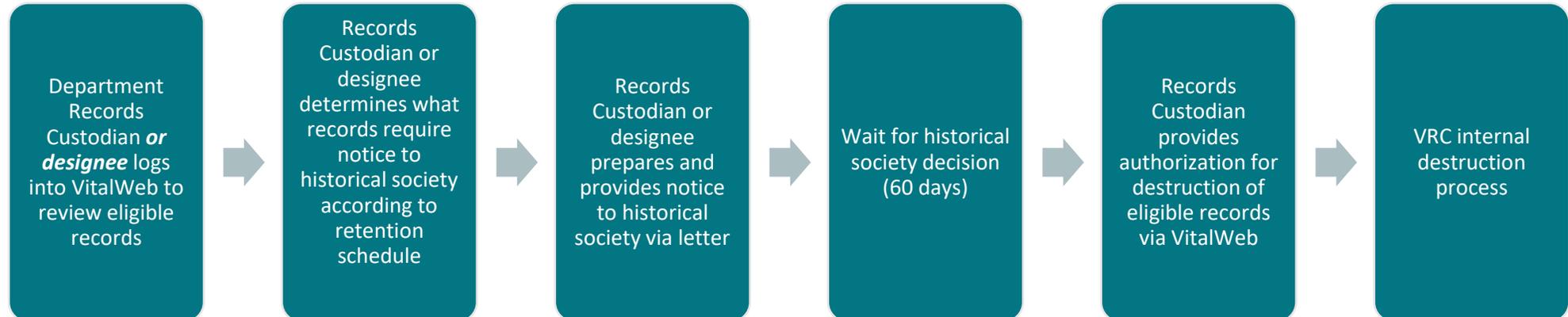
General Record Schedule

- Created by the Wisconsin Counties Association's (WCA) Records Retention Task Force in 2010
- Task force's charge was to establish a Records Retention/ Disposition Schedule for use by Wisconsin Counties that is:
 - tailored to Wisconsin Counties;
 - comprehensive and flexible;
 - in compliance with legal mandates;
 - and approved by Wisconsin's Public Records Board.
- Schedule is voluntary – Counties may opt in, revise & opt in, or opt out in whole
 - Milwaukee County wishes to revise & opt in



Record Destruction Process

- As of May 2021, there are **75,000 boxes** stored at VRC which are eligible for review for disposition.
- Currently, practices among County records owners differ and very few departments routinely destroy records.
- Only record owners have “destruction access” and until a custodian with decision-making authority instructs VRC, records will not be destroyed.
- The proposed destruction process is summarized below:



Current Storage Costs



		Active Boxes Stored (TOTAL)	Boxes Eligible for Destruction
		150,800 boxes	75,000 boxes
		Total	Total
Storage Costs	Per standard box		
Monthly storage rate	\$0.16	\$26,238	\$12,187.50
Annual cost		\$289,536	\$146,250.00

Destruction Cost Estimate



Boxes Eligible for Destruction		75,000 boxes	
Current Storage Costs	Per box	Total	
Monthly storage rate	\$0.16	\$12,187.50	
Annual cost		\$146,250.00	
Destruction Costs	Per box	Total	
VRC destruction	\$5.00	\$375,000.00	
Additional Variable Costs			
Staffing costs	Hours estimated	160 hours	Record custodian <i>or designee</i> needed from each department to review records, notify historical societies, and authorize destruction. Total estimated staff time is 4 weeks or 160 hours.
Delivery fees	\$15.00/delivery		Can avoid this fee by doing onsite review.
Retrieval/Refile fees	\$1.95/box (1000 boxes estimated)	\$1,950	If box needs to be reviewed, it can be pulled and delivered for the department to review or onsite review can be arranged. Fee applies for each box retrieved and monthly storage charges continue.
Reboxing charges	\$3.50/box (500 estimated)	\$1,750	If conditions of box are poor for handling, VRC will charge a reboxing fee.
Total Estimated		\$400,000	Payback period and minimum cost estimate = 2.5 years