



# Portland City Auditor

Archives & Records Management



## Notes Retention Guidance

The notes you create as a City employee are public records. This document provides direction for City employees, including elected officials and directors, in the proper disposition of their notes. The guidelines for notes are below, with examples and additional details following.

### Meeting notes

Official meeting notes, sometimes referred to as “minutes,” are the copy identified as the official version (record copy). Notes taken by meeting attendees for their own use are not considered minutes and are not typically required to be maintained to satisfy retention requirements outside of special cases (outlined in scenarios on page 2).

- Official minutes for meetings where the Public Meetings Law applies are required to be maintained permanently (ADM-0340).
- Minutes for meetings where the Public Meetings Law does not apply have different retention requirements, depending on the reason for the meeting. Examples:
  - Routine staff meetings minutes are not required, but if taken, keep 2 years (ADM-0360).
  - Project meeting minutes documenting decisions should be filed with the rest of the project documents and maintained for the entire retention period. If individual notes are deemed an important part of a project or initiative, then the notes become part of that record (ADM-0550, ADM-0560).
- The City’s retention schedule addresses notes in specific program areas or employee activities (i.e. hiring, collective bargaining, inspections, etc.). Please use the most relevant retention schedule to your work.

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## Notes documenting conversations and decisions

If notes are required to verify and document a conversation or decision, then the notes need to be maintained along with other relevant records. Example:

- Notes taken to document conversation during employee performance management or discipline are filed and retained in the supervisor's files (HUM-0020).

## Brainstorming, reminders, and to-do lists

Notes created for organizing thoughts or tasks, brainstorming, or short-term planning must only be retained until their purpose and usefulness have been fulfilled. Examples:

- Voicemail message notes: retain until the required action is taken. Contact Archives & Records Management if voicemails are transcribed.
- To-do lists: maintain until tasks completed or no longer relevant, then discard.
- Notes documenting individual or group brainstorming: retain if the notes become part of or the basis for an official project, document, or initiative. Early notes incorporated into a later document may be discarded. Discard notes if action is not pursued.
- Notes created to help remember ideas, methods, or concepts: discard as soon as no longer relevant.

## Notes on drafts

Notes on drafts that are then incorporated into a final document should be discarded after the final version is published, along with the drafts. Exceptions:

- Drafts made available for public comment have historical value and have a permanent retention.
- If no final version is ever produced, the most recent iteration or draft of that record would serve as the "official copy" and must be maintained accordingly.

## Examples

### Scenario 1

A City Councilor writes notes on a Council Agenda covering questions about an agenda item, and brief thoughts on how they might vote. Do these notes need to be maintained?

- If the questions and reasoning behind the Councilor's vote will be captured in the Council minutes, these notes do not need to be maintained.
- However, if the notes are substantive and are not captured in Council minutes, those notes must be retained as part of the historical record. (ADM-0100)

### Scenario 2

A bureau director attends a meeting with other directors that is primarily informative in nature. No official meeting minutes are taken. The director takes notes on items of interest to them, but that do not necessarily impact their area of responsibility. Do these notes need to be maintained?

- If the notes were created as a reference for issues with minimal impact to the director's responsibilities, the notes may be discarded as soon as they are no longer useful.
- However, if the director took notes about a topic that they were interested in, and the bureau proceeds with a project, the notes should be maintained with the issue or project records. If the topic is not acted on, the notes may be discarded.

### Scenario 3

An employee makes notes on a draft report and passes the report on to the person who will update the report. Do these notes need to be maintained? If so, who maintains them?

- The employee does not need to keep a copy of the notes.
- The person responsible for making the updates: once report is finalized, discard notes.
- Note: If the publication is made available for public comment, major milestone drafts (including comments) have historical value and have a permanent retention (ADM-0620, ADM-0630).

#### Scenario 4

Several employees are assigned to a project and attend project meetings. All staff take notes, even though there is an official note taker. Do these notes need to be maintained?

- The official meeting minutes (notes) are retained with the project documents for the entire retention period.
- The individual staff notes are kept until their usefulness has passed, or until they are incorporated into the project documentation.

#### Scenario 5

An employee notes voicemail information in a notebook. Do these notes need to be maintained?

- Once the employee acts on the information, the notes may be discarded.
- If the office maintains a system for handling public complaints and concerns, the notes may be discarded once the information is logged into the system.
- If voicemail messages are fully transcribed into email or another format, the transcription should be retained according to the retention schedule relevant to the content of the message.