



**PLANNING BOARD  
RECORDS DISPOSAL SCHEDULE  
22-85**

Revised 1/91

**Municipal Government**

**The Commonwealth of Massachusetts  
Secretary of the Commonwealth  
William Francis Galvin**

## **PLANNING BOARD RECORDS RETENTION SCHEDULE**

### **Information and Procedures**

1. The following is a list of standard records that can be found in the custody of municipal planning boards. This list includes records and forms currently mandated for their use in carrying out specific statutory responsibilities.
2. This schedule is arranged alphabetically by category e.g., activity, administration and then alphabetically by the title of the record series.
3. Each disposal schedule has a schedule number and revision date in the upper right-hand corner. The schedule number has two parts, the department number and the schedule's year of origin.
4. Any records series title with an asterisk (\*) may be destroyed without the permission of the Supervisor of Public Records, following the expiration of the specified retention period.
5. Each entry on the schedule includes: record series title; form identification, if applicable; legal citation (including statutory references to the Massachusetts General Laws); minimum period for which the record must be maintained; whether or not the record must be retained in hard copy format e.g., if the record cannot be microfilmed and destroyed; and the series number.
6. If the phrase "settlement of levy" is used in the disposition section of the disposal schedule, it designates the closure of all accounts for a particular levy through payment, abatement, or taking of property for taxes.
7. Before submitting disposal requests to the Supervisor, be sure that the records are not subject to any current or pending litigation or public records request, and that the prescribed retention period has fully expired for each record to be destroyed.
8. Records created prior to 1870 cannot be destroyed.
9. Where the disposal schedule refers to "one year following expiration of 20 day appeal period provided copy filed with clerk," indicate that a copy of the record has been filed with the city or town clerk.
10. To destroy records included on this disposal schedule, the planning board should submit to the Supervisor of Public Records two copies of a letter substantially in the form suggested here, indicating: schedule number; date of last schedule revision; series number; estimated volume; inclusive dates for each series to be destroyed; and the date of the last audit or settlement of levy, if applicable. Where the disposal period refers "Completion of satisfactory audit or final settlement of levy" After termination," include these or other variable dates so that the eligibility for destruction of the records in question may be checked.  
The planning board should sign both copies of the letter. One copy of this will be returned to the planning board with the Supervisor's approval. Following receipt of this approval, all records included in the written request may be legally destroyed, subject to any conditions specified thereon. Any record may be retained beyond this time at the discretion of the planning board.  
Original records cannot be destroyed without the written permission of the Supervisor of Public Records.
11. To destroy records that have been microfilmed and that are on the disposal schedule, the treasurer should submit to the Supervisor of Public Records two copies of a letter substantially in the form suggested here, indicating: schedule number; date of last schedule revision; series number; estimated volume; inclusive dates for each series to be destroyed; and the date of the last audit or settlement of levy, if applicable. Where the disposal period

refers to “Completion of levy, if applicable. Where the disposal period refers to “Completion of satisfactory audit or final settlement of levy” or “After termination,” include these or other variable dates so that the eligibility for destruction of the records in question may be checked.

The planning board should sign both copies of the letter. One copy of this letter will be returned to the planning board with the Supervisor’s approval. Following receipt of this approval, all records included in the written request may be legally destroyed, subject to any conditions specified thereon. Any record may be retained beyond this time at the discretion of the planning board.

12. To destroy records that are not included on this disposal schedule, refer to the Administration/Personnel (23/89) records disposal schedules. This schedule includes records held in common by various municipal offices. To destroy a record that is not presently included on this disposal schedule or the Administration/Personnel (23/89) disposal schedule, submit a letter in duplicate to the Supervisor of Public Records. The letter should indicate: schedule number; date of last schedule revision; series number; estimated volume; inclusive dates for each series to be destroyed; and the date of the last audit or settlement of levy, if applicable. If possible, attach a photocopy of the record.
13. If items subject to audit are dated with the current fiscal year and have already been audited, they should be retained through the end of the applicable fiscal year (June 30) or later, as necessary. If items subject to audit are dated with the current calendar year and have already been audited, they should be retained through the end of the applicable calendar year (Dec. 31) or later, as necessary.
14. Disposal schedules apply to information, not the media containing the information. If records maintained on electronic media (for example, magnetic tape disk or optical data storage systems) are printed out in an eye-readable format (paper or microfilm), the original electronic records may be immediately destroyed. In this case a permission letter would not need to be sent to the Supervisor of Public Records. If the electronic record is the sole source of the information, it must be treated in the same manner as its hard copy counterparts for the purposes of disposal, and must be maintained in accordance with the disposal schedule.

SAMPLE LETTER TO REQUEST PERMISSION TO DESTROY RECORDS

[Record Custodian's Letter head]

[Date]

Secretary of the Commonwealth  
Supervisor of Public Records  
Archives Division-Records Management Unit  
Massachusetts Archives at Columbia Point  
220 Morrissey Boulevard  
Boston MA 02125

Dear Supervisor:

This is to request authorization to destroy the records listed on the [list schedule name here e.g., Planning Board] records disposal schedule [list schedule number here e.g., 22/85] revised [list date of last revision; this date is on the top right corner of the records disposal schedule] as follows:

SERIES NUMBER	INCLUSIVE DATES
6.1	January 1, 1972 to June 30, 1975
6.4	January 1, 1979 to June 30, 1981

Estimated volume: 2.5 cubic feet

The last audit of accounts of this office was completed on [list date and year here e.g., Sept. 1, 1998]. I certify that to the best of my knowledge these records do not pertain to any current public record request or to any current or pending litigation to which this office is a party.

Very truly yours,

[Signature of legal Records Custodian]

APPROVED: \_\_\_\_\_  
Supervisor of Public Records

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Function	Series name (* =perm not required for destruction)	Legal citation	Disposition period	Hardcopy retention required	Series number	Date last revised
Activity.	Annual Report	c.41 s.81-C	Permanent (one mint copy).	Yes	22.1	1/4/91
Activity.	Applications (a) Special Permit	c.40A s.1-A	1 year following expiration of 20 day appeal period.	No	22.2A	1/4/91
Activity.	Applications (b) Subdivision Control Not Required	c.41 s.81-T	1 year following expiration of 20 day appeal period.	No	22.2B	1/4/91
Activity.	Applications (c) Subdivision (Preliminary)	c.41A s.81-T	1 year following expiration of 20 day appeal period.	No	22.2C	1/4/91
Activity.	Applications (d) Subdivision (Definitive)	c.41 s.81T	1 year following expiration of 20 day appeal period.	No	22.2D	1/4/91
Activity.	Decisions (a) Special Permit	c.40A s.11	1 year following expiration of 20 day appeal period, provided copy is filed with clerk.	No	22.3A	1/4/91
Activity.	Decisions (b) Subdivision Control Not Required	c.41 s.81-p	1 year following expiration of 20 day appeal period, provided copy is filed with clerk.	No	22.3B	1/4/91
Activity.	Decisions (c) Subdivision (Preliminary)	c.41 s.81-S	1 year following expiration of 20 day appeal period, provided copy is filed with clerk.	No	22.3C	1/4/91
Activity.	Decisions (d) Subdivision (Definitive)	c.41 s.81-U	1 year following expiration of 20 day appeal period, provided copy is filed with clerk.	No	22.3D	1/4/91
Activity.	Master Plan	c.41 s.81-D	Permanent (one mint copy).	No	22.4	1/4/91
Activity.	Notices for Public Hearings (a) Special Permits.	c.40-A s.11	1 year following expiration of 20 day appeal period.	No	22.6A	1/4/91
Activity.	Notices for Public Hearings (b) Subdivisions	c.41 ss.81-T, 81-U	1 year following expiration of 20 day appeal period.	No	22.6B	1/4/91
Activity.	Notices for Public Hearings (c) Zoning Changes	c.40-A s.5	1 year following expiration of 20 day appeal period.	No	22.6C	1/4/91
Activity.	Official Map	c.41 ss.81E, 81H	Permanent (one mint copy).	No	22.5	1/4/91
Activity.	Subdivision Files (a) Preliminary		1 year following date of decision.	No	22.8A	1/4/91
Activity.	Subdivision Files (b) Definitive		After completion of subdivision.	No	22.8B	1/4/91
Activity.	Subdivision Rules and Regulations	c.41 s.81-O	Permanent.	No	22.7	1/4/91
Administration.	Abutters List	c.41 s.81-T	1 year following expiration of 20 day appeal period.	No	22.9	1/4/91
Administration.	Budget/Budget Estimates		After use.	No	22.10	1/4/91
Administration.	Cash Book		After completion of satisfactory audit.	No	22.11	1/4/91
Administration.	Contracts	c.30B, c.260 ss.1, 2	7 years after termination except contracts under seal, then 21 years after termination, unless retained by central purchasing officer, then after termination of contract.	No	22.13	1/4/91
Administration.	Correspondence		3 years if no informational or evidential	No	22.12	1/4/91

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Function	Series name (* =perm not required for destruction)	Legal citation	Disposition period	Hardcopy retention required	Series number	Date last revised
			value.			
Administration.	Deposits to Treasurer		After completion of satisfactory audit.	No	22.14	1/4/91
Administration.	Meeting Notices		1 year, provided no litigation is pending.	No	22.19	1/4/91
Administration.	Minutes		Permanent.	Yes	22.18	1/4/91
Administration.	Personnel Records (a) Employment Applications (Unhired)		2 years.	No	22.15A	1/4/91
Administration.	Personnel Records (b) Earning Records		Permanent.	No	22.15B	1/4/91
Administration.	Personnel Records (c) Personnel Files Other than Earning Records		20 years after termination of employment.	No	22.15C	1/4/91
Administration.	Petty Cash Records		After completion of satisfactory audit.	No	22.16	1/4/91
Administration.	Plans (referred to in Decisions)		Permanent if not filed with clerk.	No	22.17	1/4/91