

192-WI ECONOMIC DEV CORP

Dept # /1100/ Department Name LEGAL SERVICES & COMPLIANCE

RDA # RDA Title Retention Disposition PII

00264000. **LEGAL COUNSEL FILES** **EVT+3** **SHSW** **Y**

Record Series contains legal counsel files retained by the office of The Secretary. Records may include, but are not limited to, legal opinions, correspondence, and reports from sources such as the Attorney General's Office, Personnel Commission, other WEDC Divisions and other State Departments.

Refer to #16: Records Series contains content that is confidential, or access protected:

- UCT101 - Wis. Stat. § 19.36(1); Wis. Stat. § 108.14(7)
- Pending or Potential Opportunities - Wis. Stat. § 238.08
- Trade Secret - Wis. Stat. § 19.36(5)
- Financial Identifying Information - Wis. Stat. §19.36(13)
- Certain Employee Information - Wis. Stat. § 19.36(10)
- Attorney-Client Communications - Wis. Stat. § 905.03(2)
- Attorney Work Product - Wis. Stat. § Wis. Stat. § 804.01(2)(c)1
- Information shared during a statutorily permitted closed meeting - Wis. Stat. § 19.85
- Information withheld from release under common law balancing test (no statutory citation)

Final closeout is the date the closeout report is filed and the case is resolved.

RETENTION: EVENT (Final Closeout) + 3 years and transfer to State Historical Society

Dept # /3000/ Department Name BUSINESS & COMMUNITY DEVELOPMENT

RDA # RDA Title Retention Disposition PII

00022000. **WEDC AWARD FILES** **EVT+6** **DEST** **Y**

receive approval.

Records in this series may include:

- Staff review of project
- Executed contract documents and any amendments
- Annual performance reports from the award recipient
- Annual verification letters from WEDC
- For awards that are closed out, the award closeout

Refer to #16: Records series contains content that is confidential, or access is protected:

- UCT101 - Wis. Stat. § 19.36(1); Wis. Stat. § 108.14(7)
- Pending or Potential Opportunities - Wis. Stat. § 238.08
- Trade Secret - Wis. Stat. § 19.36(5)
- Financial Identifying Information - Wis. Stat. §19.36(13)
- Certain Employee Information - Wis. Stat. § 19.36(10)

RETENTION: EVENT (Final close-out) + 6 years and destroy confidential

00022A00. **HISTORICALLY SIGNIFICANT WEDC AWARD FILES** **EVT+6** **SHSW** **Y**

Records that document the award process from pre-approval review to final close-out, for those projects that receive approval.

Records in this series may include staff review of project; executed contract documents and any amendments; annual performance reports from the award recipient; annual verification letters from WEDC; for awards that are closed out, the award closeout.

Files considered to be historically significant are those which have established legal precedents; resulted in major policy or procedural changes; have received widespread attention from the public and news media; are recognized for their uniqueness by established authorities within and outside of government.

Refer to #16: Records series contains content that is confidential, or access is protected: Wis. Stat. § 19.36(r); Wis. Stat. § 1081aQ); Wis. Stat. § 238.08; Wis. Stat. § 19.36(5); Wis. Stat. § 19.36(13); Wis. Stat. § 1e.36(10)

