

540-LIEUTENANT GOVERNOR

Dept #: /540/ Department Name: OFFICE OF THE LIEUTENANT GOVERNOR

<u>RDA #</u>	<u>RDA Title</u>	<u>Retention</u>	<u>Disposition</u>	<u>PII</u>
<u>00001000.</u>	<u>INVITATIONS</u> These records include correspondence inviting the Lt. Governor to attend or participate in various types of events, and the replies to such requests. Invitations addressed to the Lt. Governor are logged and filed by date in the office invitation and event portfolio. Electronic requests received are printed and similarly filed in the portfolio. RETENTION: EVENT (End of term) and destroy confidential	<u>EVT</u>	<u>DEST</u>	<u>Y</u>
<u>00003000.</u>	<u>PRESS RELEASES</u> Press releases issued by the Office of the Lieutenant Governor. These are maintained only in electronic versions, including Microsoft Word documents, PDFs, and as emails sent via Microsoft Outlook. In addition to press releases themselves, staff maintains media advisories and a media list of press contacts. All of these records are stored in the G drive. RETENTION: EVENT (End of term) and transfer to State Archives (WHS)	<u>EVT</u>	<u>SHSW</u>	<u>N</u>
<u>00007000.</u>	<u>LIEUTENANT GOVERNOR'S DAILY SCHEDULE</u> Summary and detailed versions of the Lt. Governor's official activities. These included meetings held or attended, public appearances, and travel, compiled for use on a daily or longer-term basis. The schedules themselves are maintained in an electronic calendar format. Schedule files may include personally identifiable information including, but not limited to, phone numbers, addresses, and personal instructions. RETENTION: EVENT (End of term) + 3 years and transfer to State Archives (WHS)	<u>EVT+3</u>	<u>SHSW</u>	<u>Y</u>
<u>00009000.</u>	<u>REVIEW OF STATE BOARDS, COUNCILS, ETC.</u> Records include all materials and research relating to the Lt. Governor's review of boards, councils, etc. to determine which boards were redundant in their duties or had served their purpose and could be eliminated, downsized or changed. RETENTION: EVENT (End of term) + 2 years and transfer to State Archives (WHS)	<u>EVT+2</u>	<u>SHSW</u>	<u>N</u>
<u>00012000.</u>	<u>BEST WISHES, CONDOLENCES, CONGRATULATIONS, GET WELL</u> These files contain letters sent by the Lt. Governor for various reasons such as new jobs, new businesses, death of individuals, illness, etc. RETENTION: EVENT (End of term) + 1 year and destroy	<u>EVT+1</u>	<u>DEST</u>	<u>N</u>
<u>00013000.</u>	<u>GREETING LETTERS AND CERTIFICATES</u> Ceremonial letters and certificates prepared and signed by the Lt. Governor at the request of individuals and organizations frequently to commemorate reunions, celebrations, retirements, birthdays, groundbreaking and similar events. RETENTION: EVENT (End of term) + 1 year and destroy	<u>EVT+1</u>	<u>DEST</u>	<u>N</u>
<u>00015000.</u>	<u>POLICY FILES</u> These are working subject matter files maintained by policy staff and others relating to specified policy areas, particular policy initiatives, designated state agencies, and intergovernmental affairs, among others. These files typically contain reports, memoranda, and other reference materials used in support of activities associated with policy research and formulation on behalf of the Lt. Governor. In addition to paper records, electronic documents are maintained in Microsoft Word, Excel, and Outlook, or as PDFs. RETENTION: EVENT (End of term) and transfer to State Archives (WHS)	<u>EVT</u>	<u>SHSW</u>	<u>N</u>
<u>00016000.</u>	<u>CONSTITUENT CORRESPONDENCE</u> Correspondence from members of the public to the Lt. Governor on matters of public interest, replies, and internal records relating to the handling of such correspondence. Incoming correspondence includes individual letters, post cards, petitions, and mass-produced form letters, as well as email correspondence received via Microsoft Outlook. In addition, these records include copies of individual replies, form responses sent to petitioner or in response to bulk mail campaigns, tracking information, including referrals within the Lt. Governor's Office or to other agencies for direct response, internal communications concerning individual inquiries or subjects of interest, lists of Microsoft Excel spreadsheets compiling contact and other information concerning correspondence on particular subjects. RETENTION: EVENT (End of term) + 1 year and transfer to State Archives (WHS)	<u>EVT+1</u>	<u>SHSW</u>	<u>Y</u>
<u>00017000.</u>	<u>MISCELLANEOUS CORRESPONDENCE (NO RESPONSE)</u>	<u>EVT+2</u>	<u>DEST</u>	<u>Y</u>

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Correspondence, arranged by date, including general request for information regarding the state of Wisconsin, letters on various subjects which contained no return address, incomprehensible correspondence, or miscellaneous correspondence as to which no useful response was deemed possible. Except for email correspondence, these records are maintained only in paper form and are not ordinarily entered or tracked electronically.

RETENTION: EVENT (Receipt and review) + 2 years and destroy confidential

<u>00018000.</u>	<u>LIEUTENANT GOVERNOR'S GENERAL CORRESPONDENCE</u>	<u>EVT+2</u>	<u>SHSW</u>	<u>Y</u>
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These files contain the Lt. Governor's correspondence, incoming and outgoing, on official matters, including routine official matters, congressional correspondence, and significant correspondence personally reviewed by the Lt. Governor relating to a variety of sensitive or otherwise important matters. Some of this correspondence may be logged and tracked electronically on the G drive. Electronic files are maintained in Microsoft Word or in PDF files.

Note: This RDA is intended to capture official correspondence of the Lt. Governor that is not covered by other RDAs, such as 00016000 (Constituent Correspondence).

RETENTION: EVENT (End of term) + 2 years and transfer to State Archives (WHS)

<u>00019000.</u>	<u>PUBLICATIONS AND REPORTS</u>	<u>EVT</u>	<u>SHSW</u>	<u>N</u>
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Reports and publications issued and released to the public by the Office of the Lt. Governor. These files are maintained only in electronic versions, including Microsoft Word documents and PDFs. All records are stored in the G drive.

RETENTION: EVENT (End of term) and transfer to State Archives (WHS)

<u>00020000.</u>	<u>STAFF ISSUE FILES</u>	<u>EVT</u>	<u>DEST</u>	<u>Y</u>
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These files are maintained by individual policy staff and others for personal convenience and reference purposes. These files may include some email correspondence, clippings, reports and publications, staff notes, and other informational materials used in the course of staff support activities on behalf of the Lt. Governor. These materials have temporary, but not continuing usefulness. Electronic documents are maintained in Microsoft Outlook, Word, or Excel, or as PDFs, and are stored on the G drive.

RETENTION: EVENT (End of term) and destroy confidential

<u>00021000.</u>	<u>LEGAL CORRESPONDENCE</u>	<u>EVT+2</u>	<u>SHSW</u>	<u>Y</u>
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These files include incoming regular and Microsoft Outlook email correspondence on legal subjects, correspondence, reports, notices, memoranda and analysis, and pleadings, as well as internal correspondence concerning the matter in question.

These records may include privileged attorney-client communications or attorney work product that are confidential pursuant to Wis. Stats. SS 905.03 and Wis. Newspress, Inc. v. Sch. Dist. of Sheboygan Falls, 199 Wis. 2d 768, 782-83, 546 N.W. 2d 143 (1996).

RETENTION: EVENT (End of term) + 2 years and transfer to State Archives (WHS)

<u>00023000.</u>	<u>PHOTO ARCHIVES</u>	<u>EVT</u>	<u>SHSW</u>	<u>N</u>
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Photo archives include photos and images of events the Lt. Governor has attended, as well as the miscellaneous photos relating to the Lt. Governor's office and staff. Photos are maintained primarily as JPEG files on the G drive.

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