

**City Clerk's Office
Records Retention Schedule**

09/15/14

| Description of Record | | Retention Schedule | Comments |
|---|--|--|--|
| Abstracts | | No legal requirement to keep. All abstracts are to be forwarded to Smith Brothers Abstract & Title Company for permanent storage. Contact Linda Taylor at 582-2148. | Abstracts of City-owned property which has been filed of record with the County Clerk of the county where the property is located. |
| Agendas and Meeting Notices | Schedule of Annual Meetings | 5 years | Public bodies required to post annual meeting schedules: boards, bureaus, commissions, agencies, trusteeships, authorities, councils, committees, public trusts, task forces or study groups supported in whole or in part by public funds or entrusted with the expending of public funds or administering public property. |
| | All Other | 3 Years | The public body is responsible for submitting annual notices to the City Clerk and for maintaining agendas; the City Clerk's Office is not required to monitor. |
| | Mayor's Agendas | 5 Years | Lists of documents signed by Mayor twice each week. |
| Annexation and Disannexation Ordinances Ledger | | Permanent | Fields in the imaging system for disannexation ordinances and annexation ordinances should be defined to access this type information. A cross reference index of annexation and disannexation ordinances. (TRO Title 9.102). |
| Appeal, Notice of | To Board of Adjustment | Retain for 1 year from the date appeal was filed. | This type appeal is heard in district court. It does not go before the City Council. |
| | To City Council requesting a trial regarding disciplinary action against a firefighter | Retain for 1 year from the date appeal was filed. | Ask Human Resources if they want records before purging. (City Charter, Article XI, Section 4.2 and TRO Title 25, Section 203.) |
| | To City Council regarding licensing and permits | Retain for 1 year from the date appeal was filed. | (TRO Titles: 11-A.306-7; 11-B.507; 21.105 & 111 & 1313 & 1407 & 1508 & 1909; 23. 209 & 213; 26.107 & 307; 50.108; and 51.308). |
| | To Council regarding inspection or code enforcement | Retain for 1 year from the date appeal was filed. | (TRO Titles: 14.101; 17.718; 24.204 & 207; 24.403; 35.908; 51.101; 56.101; 59.101; 55.101; and 52.109) |
| | To Council regarding stormwater or solid waste charges | Retain for 1 year from the date appeal was filed. | (TRO Titles: 11-A.204 & 11-B.201) |
| | To Council regarding Mayoral Orders other than Executive. | Retain for 1 year from the date appeal was filed. | (TRO Title 37.1208) |
| | To Council regarding TMAPC Amendments | Retain for 1 year from the date appeal was filed. | (TRO Title 42.1107) |
| | To Council regarding human rights violations | Retain for 1 year from the date appeal was filed. | (TRO Title 5.107 & 110) |
| | To Council regarding ADA discrimination | Retain for 1 year from the date appeal was filed. | (TRO Title 5.111) |

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| | To Utility Board regarding wastewater permits | Retain for 1 year from the date appeal was filed. | (TRO Title 11-C.1208) |
| Appointments, Mayoral | Boards, Authorities, Commissions, Committees, etc. | Permanent. Most appointments are confirmed by Council; therefore, City Council minutes serve as official record of appointments. | The Mayor's Office has maintained record of all appointments since the change in form of government in 1990. The City Clerk's Office will work with City Council to arrange for proper notice of mayoral appointment confirmations, thus ensuring the City Clerk has current record of all appointments. |
| | Sales Tax Overview Committee | City Council minutes serve as official record of appointments. | TRO Title 43-C.101 requires the City Clerk to maintain a roster of appointees. |
| | Temporary Mayor | Permanent | (City Charter Article 111.1.3 & TRO Title 4.101). |
| Assessments In past years, the City assessed taxes on property owners for public construction and other types of improvements; i.e. street, paving, sidewalk, sanitary sewer, and water. Most assessments of this type are now handled through the sales tax program. | DTID Assessment Rolls | Permanent | 11 O.S. § 101-121 requires rolls for this type of assessment be filed annually with the municipal clerk. |
| | Special Assessment Rolls | Permanent | Listings of the property and tax assessment amount on the property. This is the only current assessment. |
| | Assessment Ledgers | Permanent | (Sanitary Sewer, Water/Waterline, Streets, Paving, and Sidewalk) If the property owners don't pay the assessed tax, the City puts a lien on the property and files the lien with the appropriate county. A new property owner may find that this tax was not paid and call the City for verification. Verification can be made by utilizing the county's records. |
| Audits | City of Tulsa, Boards and Authorities | Permanent. If the microfilm can be validated against the paper ledgers, request Council approval to destroy paper and keep microfilm. | Original index cards of the paving and sidewalk assessment ledgers are in the SYV. Copies are in 3-ring binders and kept in the V. Original index cards for sanitary sewer assessment ledgers are in Room 903. According to Finance Treasury Division, the cards and ledgers do not match. Microfilm of the ledgers is in the V. The authorities and boards to which this applies are in Title 39 of the ordinances. In the absence of current codified ordinances, Legal should be consulted if an audit is received from an authority or board not listed. The Finance Accounting Division files with the City Clerk's Office a bound copy of the City's Comprehensive Annual Financial Report. Receipt of this document does not absolve the authorities' responsibility to file their audits. The City Auditor's Office has CAFRs dating 1957-58 to present. |
| Bids (Bid receipts and bids on public improvement projects.) | Airport Projects | Keep successful and unsuccessful bids 5 years following the end of the fiscal year in which the bid was submitted. | Contact Airports Department before discarding to see if they want the records. |
| | Park Projects | Keep successful and unsuccessful bids 5 years following the end of the fiscal year in which the bid was submitted. | Successful bids are filed with the contract record. Currently, bids are filed by the following five types: Public Works, Parks, Purchasing/Bid or TAC#, Purchasing, Other. |
| | Public Works Projects | Keep successful and unsuccessful bids 5 years following the end of the fiscal year in which the bid was submitted. | Successful bids are filed with the contract record. |

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| | Water and Sewer Projects | Keep successful and unsuccessful bids 5 years following the end of the fiscal year in which the bid was submitted. | Successful bids are filed with the contract record. |
| | Purchasing | Keep successful and unsuccessful bids 5 years following the end of the fiscal year in which the bid was submitted. | Successful bids are filed with the contract record. |
| Bond Registers <i>Bonds covered are:</i> (1) July 1, 1905-May 15, 1930 (2) 1935 to 1947 (3) 1926 to 1931 (4) Waterworks of 1922, Spavinaw Bonds April 11, 1922 to February 20, 1947 when paid (5) January 1, 1946 to December 30, 1965 when paid. (6) July 1, 1905 to June 15, 1923. Paid in 1946. (7) November 11, 1914 to February 1, 1918 (8) September 1, 1907 to June 15, 1930. | | Permanent | These are payment ledgers of bond coupons issued by the City of Tulsa. Some bond registers are in storage and maintained by the Finance Treasury Division rather than the City Clerk. |
| Bonds and Certificates of Insurance | | 5 years | Contractors are required to be bonded and/or insured before they can do business with the City. Individuals wanting to perform work in the City must be licensed which requires they be bonded and/or insured. Public improvement contracts will have the bonds and certificates of insurance attached/incorporated; therefore, these records are filed in the appropriate contract file rather than the general bonds/certificates of insurance file. The Finance License Center maintains the bonds and certificates of insurance related to the permits and licenses it issues. These are not maintained by the City Clerk's Office. |
| Budget, City of Tulsa Annual <i>The published budget is filed in the City Clerk's Office for reference only since the Finance Department is the archival office of the published budget, which includes information in addition to the Fund Summaries.</i> | | 3 Years | The City Auditor has budgets dating FY 1979-80 to present. No legal requirement to keep. |
| Cemeteries | Grants of Sepulcher | Permanent | Memos indicating sale of lots by owners back to the City or to other individuals. Public Works maintains cemetery maps indicating who is buried by lot. The maps do not indicate who owns the lot. |
| | Ledgers | Permanent | Ledgers indicating who is buried in the two City-owned cemeteries. Some entries indicate who owns the lot, but not all; therefore, there is no complete record of lot ownership and occupancy. The ledgers in the City Clerk's Office are a limited record of lot ownership. |
| Claims, Tort <i>(Mayoral recommendations on Tort Claims)</i> | | 5 Years | Claims for monetary damages allegedly caused by the City. State Statutes require tort claims to be filed with the municipal clerk. Upon failure to act, the claim is deemed denied. There is a business need for the City Clerk to keep the denial and approval requests acted on by the Mayor. In the imaging system, these records could be linked to the original <i>Notice of Claim or Appeal</i> . This record is currently not filed with the original <i>Notice of Claim or Appeal</i> . |

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|-----------------------|---|--|---|
| Codes | International Plumbing | Permanent | This international code is referenced in the ordinance adopting the City's plumbing code. The City may amend the international code and incorporate its own regulations applicable to the city of Tulsa. |
| | National Building (BOCA or other publisher) | Permanent | This national code is referenced in the ordinance adopting the City's building code. The City may amend the national code and incorporate its own regulations applicable to the city of Tulsa. |
| | National Electrical (BOCA or other publisher) | Permanent | This national code is referenced in the ordinance adopting the City's electrical code. The City may amend the national code and incorporate its own regulations applicable to the city of Tulsa. |
| | Basic Energy Conservation (BOCA or other publisher) | Permanent | |
| | National Existing Structures (BOCA or other publisher) | Permanent | This national code is referenced in the ordinance adopting the City's existing structures code. The City may amend the national code and incorporate its own regulations applicable to the city of Tulsa. |
| | National Fire Prevention (BOCA or other publisher) | Permanent | This national code is referenced in the ordinance adopting the City's fire prevention code. The City may amend the national code and incorporate its own regulations applicable to the city of Tulsa. |
| | National Mechanical (BOCA or other publisher) | Permanent | This national code is referenced in the ordinance adopting the City's mechanical code. The City may amend the national code and incorporate its own regulations applicable to the city of Tulsa. |
| | National Plumbing (BOCA or other publisher) | Permanent | This national code is referenced in the ordinance adopting the City's plumbing code. The City may amend the national code and incorporate its own regulations applicable to the city of Tulsa. |
| | National Basic Property Maintenance (BOCA or other publisher) | Permanent | This code is now called the National Existing Structures Code. Consider converting these records to images. |
| | CABO One & Two Family Dwelling | Permanent | Consider converting these records to images. |
| | State of Oklahoma Standard Specifications for Highway Construction | Permanent | This code is referenced in the ordinance adopting the City's standard specifications for highway construction. |
| | Tulsa City-County Health Department Food Code | Permanent | This code is referenced in the ordinance adopting the City's food code and is identical with no amendments. |
| | City of Tulsa Building | Permanent | |
| | City of Tulsa Criminal/ Penal | No legal requirement to keep because the code is written in the ordinance affecting it. | This is a copy of the ordinance adopting the City's penal code and is available to citizens for their convenience in lieu of duplicating the applicable ordinance from the codified TRO manual. |
| | City of Tulsa Electrical | No legal requirement to keep because the code is written in the ordinance affecting it. | This is a copy of the ordinance adopting the City's electrical code and is available to citizens for their convenience in lieu of duplicating the applicable ordinance from the codified TRO manual. |
| City of Tulsa Food | No legal requirement to keep because the code is written in the ordinance affecting it. | This is a copy of the ordinance adopting the City's food code and is available to citizens for their convenience in lieu of duplicating the applicable ordinance from the codified TRO manual. | |

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| | City of Tulsa Gas Piping and Fitters | No legal requirement to keep because the code is written in the ordinance affecting it. | This is a copy of the ordinance adopting the City's mechanical code and is available to citizens for their convenience in lieu of duplicating the applicable ordinance from the codified TRO manual. |
| | City of Tulsa Mechanical | No legal requirement to keep because the code is written in the ordinance affecting it. | This is a copy of the ordinance adopting the City's mechanical code and is available to citizens for their convenience in lieu of duplicating the applicable ordinance from the codified TRO manual. |
| | City of Tulsa Plumbing | No legal requirement to keep because the code is written in the ordinance affecting it. | This is a copy of the ordinance adopting the City's plumbing code and is available to citizens for their convenience in lieu of duplicating the applicable ordinance from the codified TRO manual. |
| | City of Tulsa Refrigeration | No legal requirement to keep because the code is written in the ordinance affecting it. | This is a copy of the ordinance adopting the City's refrigeration code and is available to citizens for their convenience in lieu of duplicating the applicable ordinance from the codified TRO manual.. |
| | City of Tulsa Sign | No legal requirement to keep because the code is written in the ordinance affecting it. | |
| | City of Tulsa Traffic | No legal requirement to keep because the code is written in the ordinance affecting it. | This is a copy of the ordinance adopting the City's traffic code and is available to citizens for their convenience in lieu of duplicating the applicable ordinance from the codified TRO manual. |
| | City of Tulsa Zoning | No legal requirement to keep because the code is written in the ordinance affecting it. | This is a compilation by INCOG of the ordinances adopted by the City and is available to citizens for their convenience in lieu of duplicating the applicable ordinances from the codified TRO manual. This is not a City of Tulsa publication. |
| Contractors, Prequalified | Minutes | Permanent | The City Clerk is the official record-keeping office for this Committee. |
| | Applications, financial statements, & certifications | 5 years for contractors no longer qualified or never qualified applicants. | Businesses must be prequalified to do work for the City on public improvement projects. |
| Contracts | Other | 5 years from end of the fiscal year in which the contract's final payment was made. If easement language is embodied in the contract, the retention period is permanent. | Some contracts contain temporary and permanent easements. If a temporary easement is attached, it will be filed with the contract and follow the retention period of the contract. Permanent easements, however, are filed with Easements and kept permanently. Reference is made in the contract file to the record number of the permanent easement. These type contracts were filed separately from the other contracts until 1995 at which time they were filed with Easements. |
| | Building, Tie, and Sign Setback Contracts/ Covenants | Permanent | |
| | CETA or OJT | 5 years from end of the fiscal year in which the contract's final payment was made. | Classroom training, Subrecipients, or OJT These type contracts were filed separately from the other contracts until 1995 at which time they were filed with Contracts. |
| | Fire Run | 5 years from end of the fiscal year in which the contract's final payment was made. | |
| | Lease Agreement & Renewals | 5 years from end of the fiscal year in which the contract's final payment was made. | |
| | Lease: Personal Property | 5 years from end of the fiscal year in which the contract's final payment was made. | Contracts such as the Zoo's breeding loan-in and loan-out agreements. |
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| | Lease: Stormwater Drainage Property | 5 years from end of the fiscal year in which the contract's final payment was made. | |
| | License Agreement (Non-Property) | 5 years from end of the fiscal year in which the contract's final payment was made. | |
| | Memorandum of Understanding with Labor Union | 5 years from end of the fiscal year in which the contract's final payment was made. | Annual bargaining agreement with Police & Fire Unions. |
| | Professional Services (Consulting) | 5 years from end of the fiscal year in which the contract's final payment was made. | Architectural & engineering services, including services for surveying, maintenance services, and/or cooperative agreements. |
| | Public Construction: Project | 5 years from end of the fiscal year in which the contract's final payment was made. | May contain the tabulation of bids and RFA awarding the contract to a bidder. Contains the approved contract, any change orders, and the final payment. |
| | Public Construction/ Improvement: Acquire Property | 5 years from end of the fiscal year in which the contract's final payment was made. | |
| | Public Construction: Public Buildings | Permanent | Buildings owned and operated by the City of Tulsa. Easement records will be attached. |
| | Relocation Agreement | 5 years from end of the fiscal year in which the contract's final payment was made. | |
| | Sale of Right of Way/Waterline Easement/and Temporary Easement | 5 years from end of the fiscal year in which the contract's final payment was made. | Easements are separated and filed with Easements. |
| | Sale of Right of Way/Waterline Easement/and Temporary Easement – Donations | 5 years from end of the fiscal year in which the contract's final payment was made. | Easements are separated and filed with Easements. |
| | Work Payment | 5 years from end of the fiscal year in which the contract's final payment was made. | |
| | Purchasing | 5 years from end of the fiscal year in which the contract's final payment was made. | Purchasing or contractual services agreement which has a TAC # or a Bid #. |
| | TMUA or TMWA | 5 years from end of the fiscal year in which the contract's final payment was made. If easement language is embodied in the contract, the retention period is permanent. | |

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|---|---|--|--|
| | Waterline and Watermain Extension | 5 years from end of the fiscal year in which the contract's final payment was made. If easement language is embodied in the contract, the retention period is permanent. | These type contracts were filed separately from the other contracts until 1974 at which time they were filed with easements. They are similar to PFPI contracts because they are privately financed. Permanent easements are filed with the easements and temporary easements are filed with the contract. |
| Deeds | | Permanent | Deeds to property owned by the City which are filed with the county clerk of the county where the property is located. Some deeds may be included in the old resolutions prior to 1940 which have not been indexed or numbered. |
| Deeds: Notice of Claim of Property | | Permanent | A type of deed which is handled differently than the other types and does not go to City Council for approval. |
| Discrimination Complaints | | 5 years | Copies of the original complaint forms are filed with the Human Rights Commission. |
| Easements | Application for Designation of Participating Property Outside City Limits | Permanent | Many of these are really contracts with permanent retention because of the legal description Some easements may be included in the old resolutions prior to 1940 which have not been indexed or numbered. |
| | Direct Main Line Bond Sanitary Sewer Connection Contract | Permanent | |
| | Donated | Permanent | |
| | License Agreement and Revocation | Permanent | |
| | Order Vesting Title a/k/a Journal Entry of Judgment or Agreed To Journal of Entry | Permanent | City Clerk keeps no copies. Record is returned to TMAPC after Council and Mayor execute. |
| | Permit: Freeway Utility | Permanent | |
| | Permit: Receive and File Pipeline Railroad Permit | Permanent | |
| | Purchase of easement | Permanent | |
| | Removal Contract | Permanent | |
| | Report of Commissioners ,Payment of Damages Assessed, Court Costs, and Poundage | Permanent | |
| | Right of Entry | Permanent | |
| | Right of Way Agreement | Permanent | |
| | Sale of Right of Way/ Water Line Easement/and Temporary Easement | Permanent | Must be filed with County. |

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| Description of Record | | Retention Schedule | Comments |
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| | Sale of Right of Way/ Water Line Easement/and Temporary Easement - Donations | Permanent | |
| | Sanitary Sewer Special Connection Contracts | Permanent | |
| | Temporary Easements | Permanent | |
| | Sewer Easement within a Sanitary Sewer Improvement District | Permanent | |
| | Tie Agreement Application | Permanent | Filed of record with County Clerk. |
| | Tie Agreement Release | Permanent | |
| Elections | Bond Election, Sale of Bonds, Refinancing of Bonds | Permanent | This is the City's official general obligation bond issue record. |
| | City Charter | Permanent | <p>Separate folders should be maintained for:</p> <p>(1) Bond election information: -- copy of the ordinance authorizing Mayor to call for an election -- copy of the proof of publication of ordinance authorizing election -- copy of the resolution of notice of bond election to county election board(s) -- copy of the proof of publication of resolution of notice of election -- election proclamation and notice -- proof of publication of election proclamation and notice -- certified Tulsa County Election Board results.</p> <p>If passed by the voters, a (2) Bond sale proceedings file should be created containing: -- series type (A, B) -- copy of the resolution authorizing sale of bonds -- notice to bidders of sale of bonds -- proof of publication of notice of sale of bonds -- copy of the ordinance authorizing issuance of bonds -- copy of the proof of publication of ordinance authorizing issuance of bonds -- successful bidder's specifications -- award of bid document (copy of resolution , ordinance, etc.)</p> <p>If bonds should be refinanced or remarketed in the future, a (3) Bond refinancing information file should be created containing: -- series type (A, B) -- copy of the resolution authorizing issuance of bonds -- successful bidder's specifications if the refinancing is a competitive bid (if the refinancing is a negotiated sale, there will not be a bid) -- award of bid document if the refinancing is a competitive bid (copy of resolution , ordinance, etc.)</p> <p>The original ordinances, proofs of publication, and resolutions are filed in the ordinances and resolutions files.</p> |

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|--|---|--|---|
| | Elected Officials | Permanent historical record | Included in each election file are the following documents: -- Official Certificate of Votes from County Election Board -- Resolution giving notice of special election for charter amendments -- Proposed charter amendments as filed of record with the county clerk -- Governor's approval of the proposed amendments -- Publisher's Affidavit for each proposed amendment -- Publisher's Affidavit for the special election notice -- Publisher's Affidavit for the resolution giving notice of special election |
| | Franchises | 5 years from expiration of franchise because this is a type of contract. | Filed in general files by name of franchise holder and cross-referenced in the ordinance database. |
| | Initiative or Referendum | Permanent | Filed by name of holder, i.e., ONG, PSO. This field should be cross-referenced in the ordinance database. |
| | Taxes: Permanent Or Sales Tax | Permanent | |
| Executive Orders, Mayoral and City of Tulsa Safety & Health Manual | | Permanent | |
| Flood Zoning Moratorium Waivers | | Permanent | These are City Commission files intermingled with flood zoning moratorium waivers. The moratoriums were for a specific time period set per ordinance. |
| General (All other records not categorized in this Schedule.) | Appeal of Court Decision | 10 years | |
| | Application for Transfer of Surplus Equipment | 10 years | |
| | Applications for Low Income Housing Tax Credits | 3 Years | OHFA maintains records. City Council action will be reflected in the Council minutes. No legal requirement to keep. |
| | City Driver's License Authorization Request for Temporary Employees | 10 years | |
| | Classification Revision | Permanent | |
| | Code Enforcement Cards | Permanent or until the employee terminates | |
| | Donations to City: Land or Property | Permanent | If donation was easement, it will be filed with the Easements. |
| | Donations to City: Money or goods/services | 10 years | |
| | Extension of Temporary Employees | 10 years | |
| | Initiation of Lawsuit/Removal of Litigation to Federal Court | 10 years | |
| | Leases - Notices of Eviction | 10 years | |
| Mayor's Transfer of Funds | 10 years | | |

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|-----------------------|--|--|--|
| | Payment of Joint Petition Settlement on Workers' Compensation Case | 10 years | |
| | Payment of Workers' Compensation Claim | 10 years | |
| | Personnel Actions Sent to Payroll | 10 years | |
| | Position Action Request | 10 years | |
| | Relocation and Re-establishment Expenses for Project | 10 years | |
| | Request to Abandon Public Main | 10 years | |
| | Request to Install Street Lights | 10 years | |
| | Revision of Personnel Policies, Sections 100 and 400 | Permanent | |
| | Revisions of Personnel Policies, Sections 200, 300, 500 and above | Permanent | |
| | Special Event Applications | 10 years | |
| | Special Pay Increases | 10 years | |
| | Use Agreement/Permit: River Parks Authority | 10 years | |
| | Use/Facility Agreements | 10 years | |
| | Use Permits Agreement for the Performing Arts Center | 10 years | |
| | Use Permits Agreement for the Tulsa Convention Center | 10 years | |
| | Rules and Regulations | Permanent | It is the department's responsibility for filing this record with the City Clerk. |
| Grants | Grant Request | 5 Years after expiration date of grant | The Grants Administrator in the Finance Accounting Division should approve purging of grants records to ensure grant is indeed closed. |
| | Grant Application | 5 Years after expiration date of grant | |
| | Grant Agreement | 5 Years after expiration date of grant | |

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| | Grant Agreement Amendment | 5 Years after expiration date of grant | |
| Historical | Atlas | No business need to keep. | Several copies of this atlas can be found in other City departments such as Public Works. |
| | Flag | Permanent historical record | |
| | Minutes of the Town of Garden City | Permanent historical record | |
| | Minutes of the Town of Red Fork | Permanent historical record | |
| | Seal | Permanent historical record | |
| Indexes | Abstracts | Permanent historical record | These records should be imaged since they're not located in the vault which is protected with a fire suppression system. |
| | Contractors, Prequalified | Permanent historical record | |
| | Contracts | Permanent historical record | |
| | Contracts, Setback | Permanent historical record | |
| | Deeds | Permanent historical record | |
| | Easements | Permanent historical record | |
| | Ordinances | Permanent historical record | |
| | Paving Assessments | Permanent historical record | |
| | Resolutions | Permanent historical record | |
| | Rezoning | Permanent historical record | |
| | Sanitary Sewer Assessments | Permanent historical record | |
| | Sidewalk Assessments SSIDs | Permanent historical record | |
| Invoices | | Three Years | Payments made at request of departments for miscellaneous items. |
| Minutes | Boards | Permanent historical record | |
| | City Commission | Permanent | |
| | City Council | Permanent | |
| | Contractor's Prequalification Committee | Permanent | The City Clerk is the official record-keeping office for this Committee. |
| Museum Collection | | Permanent | Duplicate set of inventory of Gilcrease Museum collection; original set stored at Gilcrease. |
| Oaths of Office | Airport Safety Officers | Until termination of employee. | |
| | Boards, Commissions or Committees | Oaths of Office should be retained 1 year after the member's successor has been appointed and confirmed. | |
| | Elected Officials | Oaths of Office should be retained 1 year after the member's successor has been appointed and confirmed. | These oaths are filed in the Elected Officials Election files. |

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| Open Records Requests | | 3 Years | |
| Ordinances | | Permanent | |
| Organizational Plan for the City | | Permanent | |
| Pension Boards | Firefighters: Pension Records | 5 years. For inactive deceased applicant files, keep 5 years from date of last pension payment. | The City's records are duplicate of the State Pension Board's archive records. |
| | Firefighters: Minutes | Permanent | |
| | Police: Pension Records | 5 years. For inactive deceased applicant files, keep 5 years from date of last pension payment. | The City's records are duplicate of the State Pension Board's archive records. |
| | Police: Minutes | Permanent | |
| Petitions | Public Improvement | 15 years | If petition is related to an SSID, file with SSID record. |
| | Other | 2 years | The box in storage is for referendum petition 93-01. |
| | Petition Response Form & Letter from City Clerk Regarding Action | Permanent | |
| PFPs (Privately Financed Public Improvements) | | Permanent | |
| Public Notices (non-ordinance) | | Same as record type or 1 Year | |
| Purchasing Recommendations to Mayor: Bid Awards or Renewal of Contracts | | 5 years from end of fiscal year of last possible renewal contract and purchase order. | |
| Purchasing Recommendations to Mayor: Emergency Purchases, Miscellaneous Invoices, or Standards | | 5 years from end of fiscal year in which purchase was made. | |
| Receipts | | 3 Years | |
| Records Transfer Forms | Purged Records & Purge Authorization Forms | Permanent | Office Services does not keep these forms. |
| | Records in Storage | Permanent | Office Services keeps copies of these forms. |
| Resolutions | | Permanent | Resolutions passed during 1900-1940 are not numbered; however, they are indexed alphabetically by subject, and reference to the location in the City Commission minutes is noted. A field titled "Type of Resolution" needs created in the imaging system. |
| Safety & Health Manual (City of Tulsa) | | Permanent | Updated as supplements are received. |
| Sinking Fund Requirements Report | | Permanent | |
| SSIDs (Sanitary Sewer Improvement Districts) | | Permanent - Legal has a business need to keep. | Ledgers are in the Vault but have not been kept current. An index field for SSID needs created in the ordinance and contract databases. |
| Trust Indentures of Boards and Authorities | | Permanent | Need index field for this type of ordinance in the imaging ordinance database. |
| Warrant Lists | | 10 Years | These are lists of warrants (checks) as referenced in the City Commission minutes. This record is now maintained by the Finance Accounting Division, who retains check registers 10 years. |

Records Review Team:
(1997-1998)

Michael P. Kier, City Clerk, City Treasurer, and Director of Finance
Diane Lee, Senior Administrative Services Officer
Cheryl VanSike, Deputy City Clerk
Bill Northcutt, Deputy City Attorney

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**Alan Jackere, Senior Assistant City Attorney and Manager, Contracts/Real Property Division
Jim Johanning, Senior Systems Analyst, ISD**

| Records Coordinator | Web Access | Phone | Department | Division/Section | DS Account | COT Center No. | Address | Email Address | Manager |
|-----------------------------|---|----------|----------------------------|---|------------|----------------|---------------|--|-----------------|
| CITY OF TULSA | | | | | | | | | |
| MARTIN, Wendy | y | 596-2489 | Finance Information | City Clerk | CIT001 | n/a | OTC 8th Floor | wmartin@cityoftulsa.org | Mike Kier |
| SHERMAN, Pam | y | 596-7619 | Technology (IT) | | CIT001 | n/a | OTC 6th Floor | psherman@cityoftulsa.org | Chris Berg |
| 6/9/2014 | ASSET MANAGEMENT [FORMERLY EQUIPMENT MANAGEMENT (EMD)] | | | | | | | | |
| REEL, John | NO | 596-9815 | Equipment Management (EMD) | | CIT001 | 053 | 490 W 23 ST | jreel@cityoftulsa.org | Brian Franklin |
| WHALEN, Diane | NO | 596-9815 | Equipment Management (EMD) | | CIT001 | 053 | 490 W 23 ST | dwhalen@cityoftulsa.org | Brian Franklin |
| CITY COUNCIL | | | | | | | | | |
| NO AUTHORIZATIONS | | | | City Council | CIT001 | 070 | | | |
| 6/10/2014 | CUSTOMER CARE CENTER | | | | | | | | |
| LYDENS, Ed | | 596-7050 | Customer Care Center | | CIT001 | 042 | OTC 8th Floor | edlydens@cityoftulsa.org | Michael Radoff |
| RADOFF, Michael | | 596-7605 | Customer Care Center | | CIT001 | 042 | OTC 8th Floor | mradoff@cityoftulsa.org | Jim Twombly |
| COMMUNICATIONS | | | | | | | | | |
| NO AUTHORIZATIONS | | | | Communications | CIT001 | 009 | | | |
| ENGINEERING SERVICES | | | | | | | | | |
| NO AUTHORIZATIONS | | | | Engineering Services | CIT001 | 040XXX | | | |
| 6/13/2014 | FINANCE | | | | | | | | |
| BROWN, Zethal | NO | 596-7533 | Finance | Accounting/ Accounts Payable | CIT001 | 012052 | OTC 8th Floor | zbrown@cityoftulsa.org | Jane Pimm |
| DICK, Terry | NO | 596-7524 | Finance | Accounting/ Accounts Payable | CIT001 | 012052 | OTC 8th Floor | tdick@cityoftulsa.org | Jane Pimm |
| KIRK, Mari | NO | 596-7532 | Finance | Accounting/ Accounts Payable | CIT001 | 012052 | OTC 8th Floor | mkirk@cityoftulsa.org | Jane Pimm |
| KOWALENKO, Jeanne | NO | 596-7539 | Finance | Accounting/ Accounts Payable | CIT001 | 012052 | OTC 8th Floor | jkowalenko@cityoftulsa.org | Jane Pimm |
| PETERSON, Vivian | NO | 596-7239 | Finance | Accounting/ Accounts Payable | CIT001 | 012052 | OTC 8th Floor | vpeterson@cityoftulsa.org | Jane Pimm |
| PIMM, Jane | NO | 596-7527 | Finance | Accounting/ Accounts Payable | CIT001 | 012052 | OTC 8th Floor | jpimm@cityoftulsa.org | Christy Basgall |
| BASGALL, Christy | NO | 596-7588 | Finance | Accounting/ General Accounting Administration | CIT001 | 012055 | OTC 8th Floor | cbasgall@cityoftulsa.org | David Bryant |
| BRYANT, David | NO | 596-7620 | Finance | (Division Manager) | CIT001 | 012XXX | OTC 8th Floor | dbryant@cityoftulsa.org | Mike Kier |
| HARKEY, Glenda | Y | 596-7519 | Finance | Accounting/ Payroll | CIT001 | 012053 | OTC 8th Floor | gharkey@cityoftulsa.org | Norman Kildow |
| GERHART, Valerie | Y | 596-7517 | Finance | Accounting/ Payroll | CIT001 | 012053 | OTC 8th Floor | vgerhart@cityoftulsa.org | Glenda Harkey |
| PRATT, Lisa | Y | 596-7518 | Finance | Accounting/ Payroll | CIT001 | 012053 | OTC 8th Floor | lpratt@cityoftulsa.org | Glenda Harkey |
| KIDD, Russell | y | 596-7513 | Finance | City Clerk | CIT001 | 012061 | OTC 2nd Floor | rkidd@cityoftulsa.org | Kim Bennett |
| MAYES, Tony | y | 596-7514 | Finance | City Clerk | CIT001 | 012061 | OTC 2nd Floor | amayes@cityoftulsa.org | Russell Kidd |
| THOMAS, Linda | y | 596-7607 | Finance | City Clerk | CIT001 | 012061 | OTC 2nd Floor | lthomas@cityoftulsa.org | Russell Kidd |
| CUMMINGS, Patricia | Y | 596-7233 | Finance | Purchasing | CIT001 | 012041 | OTC 8th Floor | pcummings@cityoftulsa.org | Larry Hood |
| BECKER, Chad | Y | 596-7642 | Finance | Treasury/ Revenue Collections | CIT001 | 012035 | OTC 2nd Floor | cbecker@cityoftulsa.org | Stan Jones |
| JONES, Gary | NO | 596-7569 | Finance | Treasury/ Revenue Collections | CIT001 | 012035 | OTC 2nd Floor | gjones@cityoftulsa.org | Chad Becker |
| RICHARDSON, Stephanie L. | NO | 596-7572 | Finance | Treasury / Financial Services | CIT001 | 012037 | OTC 8th Floor | stephaniejackson@cityoftulsa.org | Marilyn Baldwin |
| STOUT, Pam | Y | 596-1885 | Finance | Utilities | CIT001 | 012087 | OTC 8th Floor | pstout@cityoftulsa.org | Mark Weathers |

| | Records Coordinator | Web Access | Phone | Department | Division/Section | DS Account | COT Center No. | Address | Email Address | Manager |
|------------------|--|------------|----------|------------------------------------|--------------------|------------|--------------------|-------------------------|--|-------------------|
| 6/9/2014 | FIRE (TFD) | | | | | | | | | |
| | MOSLEY, Lisa | Y | 596-7360 | Fire | Executive Admin | CIT001 | 032011 | 1760 Newblock Park | imosley@cityoftulsa.org | Michael Baker |
| | SEALS, Tina | Y | 596-9422 | Fire | Executive Admin | CIT001 | 032011 | 1760 Newblock Park | tseals@cityoftulsa.org | Mark D. Sipe |
| | MACK, June | Y | 596-1211 | Fire | Executive Admin | CIT001 | 032011 | 1760 Newblock Park | jmack@cityoftulsa.org | Mark D. Sipe |
| | DEAN, Marlowe | Y | 596-9441 | Fire | Executive Admin | CIT001 | 032011 | 1760 Newblock Park | sdbanks@cityoftulsa.org | Ray Driskell |
| | KITTRILL, Kay | Y | 596-1781 | Fire | Executive Admin | CIT001 | 032011 | 1760 Newblock Park | kkittrell@cityoftulsa.org | Stacy Belk |
| | BUEHLER, Jennifer | Y | 596-9443 | Fire | Executive Admin | CIT001 | 032011 | 1760 Newblock Park | jwalters@cityoftulsa.org | Scott Clark |
| | HUMAN RESOURCES (HR) | | | | | | | | | |
| | NO AUTHORIZATIONS | No | 596-1214 | Human Resources (HR) | | CIT001 | 017xx | OTC 5th Floor | | |
| 6/9/2014 | HUMAN RIGHTS (HRD) | | | | | | | | | |
| | LAFOND, Stacey | y | 596-7819 | Human Rights (HRD) | | CIT001 | 014 | OTC 6th Floor | slafond@cityoftulsa.org | Jackson Landrum |
| | WADE, Rod | y | 596-7691 | Human Rights (HRD) | | CIT001 | 014 | OTC 6th Floor | rwade@cityoftulsa.org | Jackson Landrum |
| 6/9/2014 | INFORMATION TECHNOLOGY (IT) | | | | | | | | | |
| | BERG, Chris | Y | 576-5605 | Information Technology (IT) | IT Administration | CIT001 | 034011 | OTC 6th Floor | cberg@cityoftulsa.org | TL Cox |
| | SHERMAN, Pam | y | 596-7619 | Information Technology (IT) | IT Office Services | CIT001 | 034011 | OTC 6th Floor | psherman@cityoftulsa.org | Chris Berg |
| | *NOTE - Telecommunications is now "Communication Services" and is a Division of IT | | | | | | | | | |
| 6/9/2014 | INTERNAL AUDITING (IA, not to be confused with TPD-IA) | | | | | | | | | |
| | CRISWELL, Cathy | NO | 596-7505 | Internal Auditing | | CIT001 | 060021 | OTC 6th Floor | cathycriswell@cityoftulsa.org | Elected Official |
| | FIELDS, Janet | NO | 596-7844 | Internal Auditing | | CIT001 | 060021 | OTC 6th Floor | janetfields@cityoftulsa.org | Ron Maxwell |
| | MAXWELL, Ron | NO | 596-7845 | Internal Auditing | | CIT001 | 060021 | OTC 6th Floor | rmaxwell@cityoftulsa.org | Cathy Criswell |
| 6/9/2014 | LEGAL | | | | | | | | | |
| | BYFORD, Julie | Y | 596-7717 | Legal | | CIT001 | 015051 | OTC 6th Floor | jbyford@cityoftulsa.org | Jean Ann Husdon |
| | DISNEY, Teresia | Y | 596-7717 | Legal | | CIT001 | 015051 | OTC 6th Floor | tdisney@cityoftulsa.org | Julie Byford |
| | GRAYSON, Erica | Y | 596-7717 | Legal | | CIT001 | 015051 | OTC 6th Floor | egrayson@cityoftulsa.org | Julie Byford |
| | HENDERSON, Robin | Y | 596-7717 | Legal | | CIT001 | 015051 | OTC 6th Floor | robinhenderson@cityoftulsa.org | Julie Byford |
| | MAYOR'S OFFICE | | | | | | | | | |
| | NO AUTHORIZATIONS | | | | | CIT001 | unavailable | | | |
| | MAYOR'S OFFICE OF ECONOMIC DEVELOPMENT | | | | | | | | | |
| | NO AUTHORIZATIONS | | | | | CIT001 | unavailable | | | |
| 6/10/2014 | MUNICIPAL COURT | | | | | | | | | |
| | BRADER, Kelly | Y | 596-7760 | Municipal Court | Director | CIT001 | 018011 | 600 Civic Center | kbrader@cityoftulsa.org | |
| | GOUDEAU, Nida | Y | 596-7789 | Municipal Court | | CIT001 | 018011 | | ngoudeau@cityoftulsa.org | Gretchen Herring |
| | GRAHAM, Keli | Y | 596-7745 | Municipal Court | | CIT001 | 018011 | 600 Civic Center | kgraham@cityoftulsa.org | Keli Graham |
| | HERRING, Gretchen | Y | 596-7784 | Municipal Court | | CIT001 | 018011 | 600 Civic Center | gherring@cityoftulsa.org | Kelly Brader |
| | OSBORNE, Tammie | Y | 596-7759 | Municipal Court | | CIT001 | 018011 | 600 Civic Center | tosborne@cityoftulsa.org | Gretchen Herring |
| | *NOTE - Early Settlement is a Division of Municipal Court | | | | | | | | | |
| | PARKS & RECREATION | | | | | | | | | |
| | RICHARVILLE, DEAN | Y | 596-7851 | Parks & Recreation | | CIT001 | 005 | 175 E. 2nd St. | drichardville@cityoftulsa.org | Lucy Dolman |
| | BATTENFIELD, MIKE | Y | 596-2486 | Parks & Recreation | | CIT001 | | 1712 Charles Page Blvd. | mikebattenfield@cityoftulsa.org | Lucy Dolman |
| 6/9/2014 | PERFORMING ARTS CENTER (PAC) | | | | | | | | | |
| | REED, Alana | Y | 596-7129 | Performing Arts | | CIT001 | 028 | 110 E. 2nd Street | areed@cityoftulsa.org | Janet Rockefeller |
| | WILLIAMS, Danielle A. | Y | 596-7123 | Performing Arts | | CIT001 | 028 | 110 E. 2nd Street | dawilliams@cityoftulsa.org | Nancy Hermann |
| | PLANNING & DEVELOPMENT | | | | | | | | | |
| | NO AUTHORIZATIONS | | | Planning & Economic Development | | CIT001 | 041 | | | |
| | POLICE (TPD) | | | | | | | | | |

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|---|---|------------|----------|----------------------|---|------------|-----------------|---------------------------|--|----------------------|--|
| 6/27/2014 | EVANS, Van | | 596-9310 | Police | HQ, Internal Affairs | CIT001 | 031 | 600 Civic Center, 3rd Flr | vevans@cityoftulsa.org | Luther Breashers | |
| 6/10/2014 | WILSON, Taylour | Y | 596-9129 | Police | Forensic LAB | CIT001 | 031 | 1111 W. 17th Street | taylourwilson@cityoftulsa.org | Becky Giangreco | |
| | GIANGRECO, Becky | Y | 596-2659 | Police | Forensic LAB | CIT001 | 031 | 1111 W. 17th Street | bgiangreco@cityoftulsa.org | Tara Valouch | |
| | VALOUCH, Tara | Y | 596-9128 | Police | Forensic LAB | CIT001 | 031 | 1111 W. 17th Street | tvalouch@cityoftulsa.org | Major Rod Hummel | |
| | *NOTE - Forsenic Lab is a division of TPD | | | | | | | | | | |
| | *NOTE - Internal Affairs is a division of TPD | | | | | | | | | | |
| POLICE - 911 PUBLIC SAFETY COMMUNICATIONS (911 and/or PSC) DIVISON [FORMERLY STAND ALONE DEPARTMENT] | | | | | | | | | | | |
| | NO AUTHORIZATIONS | | | | Police (911 PSC) | CIT001 | 035 | | | | |
| 6/10/2014 | STREETS & STORMWATER | | | | | | | | | | |
| | TIGER, Julia | Y | 596-9594 | Streets & Stormwater | Administration | CIT001 | 044711 | OTC 8th Floor | jtiger@cityoftulsa.org | Roy Teeters, Interim | |
| | WRIGHT, Julia Sherri | Y | 596-9807 | Streets & Stormwater | Administration | CIT001 | 044712 | OTC 8th Floor | Swright@cityoftulsa.org | Julia Tiger | |
| 5/12/2014 | WATER & SEWER | | | | | | | | | | |
| | BRINKMAN, Melanie | Y | 596-9470 | Water & Sewer | Administration & TMUA | CIT001 | 043611 & 043612 | OTC 8th Floor | mbrinkman@cityoftulsa.org | Desiree Quarles | |
| | QUARLES, Desiree | Y | 596-9501 | Water & Sewer | Administration & TMUA | CIT001 | 043611 & 043612 | OTC 8th Floor | dquarles@cityoftulsa.org | Clayton Edwards | |
| | GASTON, Sherry | Y | 596-1824 | Water & Sewer | TMUA | CIT001 | 043612 | OTC 8th Floor | sgaston@cityoftulsa.org | Clayton Edwards | |
| 6/10/2014 | GRIFFIN, Merlin | Y | 591-4564 | Water & Sewer | Water Quality Assurance (Northside Water Treatment Plant) | CIT001 | 043635 | 5665 N 105 E Ave | megriffin@cityoftulsa.org | Ella J Brown | |
| | ORRICK, Bill | Y | 591-4563 | Water & Sewer | Water Quality Assurance (Northside Water Treatment Plant) | CIT001 | 043635 | 5665 N 105 E Ave | borrick@cityoftulsa.org | Ella J Brown | |
| | BROWN, Ella J "Jo" | Y | 596-8047 | Water & Sewer | Water Quality Assurance (AB Jewell Water Treatment Plant) | CIT001 | 043635 | 18707 E 21 St | eibrown@cityoftulsa.org | Roy Foster | |
| | SCHWARTZ, Jeana | Y | 591-4560 | Water & Sewer | Water Quality Assurance (Northside Water Treatment Plant) | CIT001 | 043635 | 5665 N 105 E Ave | jschwartz@cityoftulsa.org | Merlin Griffin | |
| | *NOTE - Raw Water Supply is a Division of Water & Sewer | | | | | | | | | | |
| WORKING IN NEIGHBORHOODS (WIN) | | | | | | | | | | | |
| | NO AUTHORIZATIONS | | | | Working In Neighborhoods (WIN) | | | 020 | | | |
| | *NOTE - Animal Welfare is a Division of WIN | | | | | | | | | | |
| END OF LIST | | | | | | | | | | | |
| | *NOTE - Workforce is a program no longer managed by the City of Tulsa & was a part of a department which no longer exists | | | | | | | | | | |

Off-site Storage Records Transmittal Procedures

Prepare boxes for storage

1. **Use standard records storage boxes** (*unless nonstandard is required to accommodate a specific record type*) –

- Standard boxes (12W X 15L X 10H) are used at all commercial storage facilities and are designed to fit into standard commercial storage space.
- Boxes are constructed to accommodate a weight of 35 to 50 lbs (burst weight).
- Do not pack boxes completely full – leave room to provide enough space (1-2 inches) to be able to lift files out. It may also be necessary to add a file or two to the same box at a later date.

2. **Determine the appropriate contents** –

General Practice

- A box should contain only one kind of record (record series).
- Include records with the same retention dates. The retention dates come from our records retention schedule. If you have any questions about this, please contact the Records Manager.
- Include a contents list and place it inside the box on top of the documents (save a copy)

3. **File folders** –

- Place files in the boxes in an upright position, not lying flat (provides easy viewing and retrieval of file titles).
- Do not pack hanging folders. Create a file folder, if necessary, or transfer file folders from within hanging folders directly into the box.

4. **Binders** –

- Remove documents from binders before placing in the records boxes.
- When it comes time to dispose of the boxes, the binders make it a more difficult and costly task to meet disposal criteria such as shredding.
- Place contents in folders or use plastic (not metal or elastic) cable ties to secure each of the 3 holes.

5. **Mixed Media** (Paper combined with other types of hard-copy media) –

- Complete collections of photos, slides, CDs, computer tapes / disks, etc. should be boxed separately and stored in special vault storage.
- Non-paper media (photos, slides, CDs, etc.) should be boxed with paper records when they comprise part of the paper file.

6. **Box Labeling** –

- Apply the vendor-provided label or box number in the upper right corner of the smallest side of the box.
- Write the department name on the box.
- Write the records series number on the box. The record series numbers come from our records retention schedule. If you have questions about this contact the Records Manager.

7. **A final check** –

- Lids must close securely
- Confirm the contents of the box match the description on the transmittal form

Prepare and Submit the Transmittal Form

1. Records Storage Transmittals –

The transmittal form contains important information that enables the proper documentation, storage, and servicing of the records.

- Download the Records Transmittal form from the Public Records Folder in the DocLibrary.
- Forward the completed Records Transmittal to the Records Manager at wzmartin@cityoftulsa.org. If the Records Manager is out on extended vacation or sick leave she will appoint a designee.
- The Records Manager or designee will review the Records Transmittal form to ensure it is complete and the retention date (dest date) is properly stated in accordance with the records series number.
- Print a copy of the final approved Records Transmittal form and place it on top of your boxes.
- The Records Manager or designee will contact Data Storage to request pick-up for your boxes.



Invitation For Bid (IFB) #TAC700B Addendum 4
Description: Record Storage (971-70) IT
Issued: December 10, 2009

City of Tulsa,
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FORM #7 (PAGE 1 OF __)
DELIVERY AND PRICING

1. Delivery: You must be able to deliver the Goods and/or Services as specified in your Bid. Failure to do so may result in City terminating your contract or canceling the Purchase Order, pursuing collection under any performance bond, as well as any other damages to which it may be entitled in law and in equity.

2. Pricing. You agree to sell City the following Goods and/or Services according to the fixed prices shown below. You must state the total cost necessary to provide all Goods and/or Services, including all shipping F.O.B. Tulsa, Oklahoma (prepaid freight), but excluding all federal excise and state sales taxes from which City is exempt.

| Item | Description | Cubic feet | Per Cubic Feet Cost | Total Monthly Cost |
|-----------------------------------|---|------------|---|--------------------|
| 1 | Storage pricing | 17889 | | |
| | Secure space for the storage of deposits | | \$0.18 | |
| | Storage minimum(per month) | | 0 | 0 |
| TOTAL COST PER MONTH | | | \$ <u>3,220.02</u> | |
| Miscellaneous Additional Charges: | | | | |
| 2 | Management Services Pricing | | | |
| 2A | New deposits | | \$ <u>.95</u> per cu ft | |
| 2B | Retrievals/Re-files (from storage/back to storage) | | | |
| | Standard | | \$ <u>No charge</u> per cu ft | |
| | Rush | | \$ <u>1.50</u> per cu ft | |
| 2C | Destruction | | | |
| | Destruction by Shredding | | \$ <u>2.50</u> per cu ft plus retrieval | |
| | Permanent Withdrawal | | \$ <u>2.00</u> per cu ft plus retrieval | |
| 2D | Service Minimum | | \$ <u>No Minimum</u> per transaction | |
| 3 | Transportation | | Per Visit | Per cubic foot |
| 3A | Delivery Next Day | | \$10.00 | \$0.95 |
| 3B | Delivery Half Day - delivery by 5pm | | \$10.00 | \$0.95 |



Invitation For Bid (IFB) #TAC700B Addendum 4
Description: Record Storage (971-70) IT
Issued: December 10, 2009

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| | | Per Visit | Per Cubic foot |
|-----------|---|-----------------|----------------|
| 3C | Delivery by 12pm | \$10.00 | \$0.95 |
| 3D | Emergency Visit (Rush) - Delivery within 3 hrs of request | \$50.00 | \$0.95 |
| 3E | After Hours/Weekends/Holidays - Delivery within 4 hours of request | \$85.00 | \$0.95 |
| 4 | Pickup | Per Trip | Per Cubic foot |
| | On Demand - Scheduled within 48 hours of request | \$10.00 | \$0.95 |
| 5 | Computer and Reporting Charges | Monthly listing | Free |
| 5A | Charge for Monthly Supplemental Reports - including special sorting and special file listings | Free | Free |
| 6 | Initial Transfer/Receiving and Entry (pickup, transport and receipt of Customer deposits (files) for the initial storage. | Free | Free |
| 7 | Cost for inspection (site visit) | Per occurrence | Free |

3. Annual Price Adjustment. The prices bid for any Goods and/or Services shall not increase during the initial term of the contract. However, if you anticipate that you will not be able to maintain firm prices for any renewal period, a change in price **will be considered** if the following conditions are met:

- a) You must limit any increase to **one** of the following (indicate your choice*):
 - a. the change in the Consumer Price Index from BLS Table 1(web link below) from the prior year, as measured by the change in the CPI-U between the most recent month available and that same month in the prior year X (place an "X" here if this is your choice)
 - b. a fixed percentage you specify %
- b) You must notify City, in writing, no later than 90 days before the initial contract period ends, or any renewal period ends, of your intent to exercise the price choice in your bid. **Failure to so notify City will result in City denying any price increases.** In no event can the proposed price change exceed that possible under the choice in your bid. Your notice can be sent by certified mail, fax or email.
- c) **You must certify at renewal that the prices you are requesting from the City, including any increase requested, are as favorable as the prices you are charging your other customers which purchase similar quantities, and types, of goods and services.** Any increase requested at renewal will be considered in the City's decision whether to renew, or re-bid, the contract.**

Notes: * - Any price increase you choose will be considered in the evaluation of your bid. If you choose the CPI-U, the annual increase used for evaluation will be assumed to equal the change in the CPI-U for the prior year, as described above.

** - The Affidavit of Compliance for Price Adjustment, which will need to be provided **at renewal** if an increase is requested, can be accessed via the following Web Link: <http://204.62.23.97/Fms/FI.htm> , or you may contact the Buyer listed on this Invitation for Bid to request one.

CPI Web Link: <http://www.bls.gov/news.release/cpi.t01.htm>