



## CITY COUNCIL AGENDA REPORT

**Meeting Date:** May 2, 2019

**From:** Ingrid Padilla, City Clerk

**Subject:** Adoption Resolution 2019-11 Adopting a New City-Wide  
Records Retention Policy and Schedule

### Community Goal/Result

Community Building and Fiscally Prudent

### Purpose

The purpose of this policy is to ensure that all necessary City records and documents are adequately maintained in order to provide opportunities for the Community's residents, businesses, and users of City services to engage in City programs, services and policy-making while ensuring fiscal responsibility for the City.

### Recommendation

Staff recommends that the City Council adopt the attached Resolution No. 2019-11 adopting a new city-wide records retention policy and schedule.

### Background

A Records Retention Policy and Schedule is needed by the City to ensure that all necessary records and documents are adequately maintained and comply with Federal, State, and local retention requirements. Additionally, retention schedules ensure that when records are no longer needed, they are destroyed in a timely and secure manner.

In 2000, City Council approved a retention policy and retention schedule for the Finance Department with the adoption of Resolution 2000-04. The retention schedule for the Finance Department outlined in this policy is now out of date.

In 2007, the City worked with records management consultant Bruce Meier, to implement a set of draft retention schedules for department records. These schedules are also now out of date and missing key components for a legally acceptable retention program.

In 2016, City Council approved a records retention schedule for the Police Department with the adoption of Resolution 2016-38. However, other City Departments such as Finance, City Clerk, City Manager, Community Development, Human Resources, Information Services, Parks & Recreation, and Public Works do not have a retention schedule to use as a tool to manage their records.

## Discussion

The City Council approved the expenses for a Records Retention Project for FY 2016-2018. Aside from the Police Department, all of the City's departments worked with records management consultant Bruce Meier and the then City Attorney Michael Roush to develop the Records Retention Schedule that reflects federal and state law and the city's interests. Mr. Meier will also develop records management training for staff as part of the Records Retention Project.

If Resolution 2019-11 is approved, City records, documents, instruments, books or papers, as set forth on the Brisbane Records Retention Schedule, may be destroyed without making a copy thereof if the department head certifies that those records are no longer required and the City Attorney gives written consent to the destruction of the records. These certificates will then be maintained in the City Clerk's Office.

Secondly, with the consent of the City Clerk, City Manager, and City Attorney, updates will be authorized to be made to the Records Retention Schedule without further action by the City Council.

Lastly, all written or electronic documents, sound, or video works created by employees in the course of executing the City's business are records under this policy regardless of whether they are managed in a formal process by the employee's department or kept by an employee or their work unit for reference or any other purpose.

## Fiscal Impact

The fiscal impact of the proposed retention schedule is minimal. Departments will see initial costs for destroying older records.

## Measure of Success

The City-wide Records Retention Policy and Schedule is implemented in compliance with Federal, State and Local requirements.

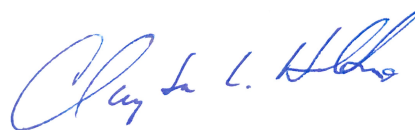
## Attachments

- Resolution No. 2019-11



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Ingrid Padilla, City Clerk



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Clay Holstine, City Manager

ATTACHMENT 1  
RESOLUTION NO 2019-11

**A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BRISBANE ADOPTING  
A CITY-WIDE RECORDS RETENTION POLICY AND SCHEDULE FOR THE  
FINANCE, CITY CLERK, CITY MANAGER, COMMUNITY DEVELOPMENT, HUMAN  
RESOURCES, INFORMATION SERVICES, PARKS & RECREATION, AND PUBLIC  
WORKS DEPARTMENTS**

WHEREAS, the keeping of certain city records is not necessary after a certain period of time for the effective and efficient operation of the Finance, City Clerk, City Manager, Community Development, Human Resources, Information Services, Parks & Recreation, and Public Works Departments; and

WHEREAS, Section 34090, et seq., of the Government Code of the State of California provides a procedure whereby a city record which has served its purpose and is no longer required may be destroyed as long as the destruction of such record will not interfere with the services and functions of the City's Departments; and

WHEREAS, the then City Attorney and Department heads has determined the useful retention period of the City records consistent with the requirements of federal law, state law and the city's interests; and

WHEREAS, the Brisbane City Council adopted Resolution No. 2000-04 on January 24, 2000 to approve a records retention schedule for the Finance Department which is no longer up to date; and

WHEREAS, the Brisbane City Council adopted Resolution No. 2016-38 on July 14, 2016 establishing a Records Retention Schedule for the Police Department leaving the remaining City Departments in need of a similar tool for records management; and

NOW, THEREFORE, the City Council of the City of Brisbane resolves as follows:

Section 1. Resolution Number 2000-04 is hereby rescinded.

Section 2: City records, documents, instruments, books or papers, as set forth on the Brisbane City-wide Records Retention Policy and Schedule attached hereto as Exhibit A, may be destroyed without making a copy thereof if (a) the department head certifies that those records are no longer required and (b) the City Attorney gives written consent to the destruction of the records.

Section 3: This resolution does not authorize the destruction of records required to be retained by statute.

Section 4. With the consent of the City Clerk, City Manager, and City Attorney, updates are hereby authorized to be made to the Records Retention Schedule without further action by the City Council.

Section 5. This resolution shall become effective immediately upon passage and adoption.

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Madison Davis  
Mayor

I hereby certify that the foregoing Resolution No. 2019-11 was duly and regularly adopted at a regular meeting of the Brisbane City Council on May 2, 2019, by the following vote:

Ayes:  
Noes:  
Absent:  
Abstain:

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Ingrid Padilla  
City Clerk



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Thomas McMorrow  
Interim City Attorney

**EXHIBIT A**  
**CITY OF BRISBANE**  
**City-wide Records Retention Policy**

**OVERVIEW**

This Policy sets forth guidelines and procedures pertaining to the retention, purge, and destruction of City records maintained by the Finance, City Clerk, City Manager, Community Development, Human Resources, Information Services, Parks & Recreation, and Public Works Departments.

This Policy is established by the City in accordance with all relevant federal, state, and local laws, and contractual requirements. In particular, this Policy is established in accordance with the State Record Retention laws (Government Code §34090, *et seq.*) as well as the California Public Records Act (Government Code §6250, *et seq.*). Additionally, where relevant to the particular needs of the City's management of records, the City has incorporated provisions from professional standards and guidelines.

All written or electronic documents, sound, or video works created by employees in the course of executing the City's business are records under this policy regardless of whether they are managed in a formal process by the employee's department or kept by an employee or their work unit for reference or any other purpose.

**RECORDS RETENTION**

Records retention requirements have been identified for the Finance, City Clerk, City Manager, Community Development, Human Resources, Information Services, Parks & Recreation, and Public Works Departments. Record series (groups of logically related documents) are titled for simplified records identification. Each record series has been evaluated based upon its administrative, operational, legal and historical value to determine the appropriate retention period. This evaluation is included in the records retention schedule.

For each record series, the schedule identifies the following:

- **Record Description.** Identifies the type of record to be retained.
- **Retention Period.** Establishes the period of time which the documents must be retained.

Active Retention Period is the period when records can be referenced and readily accessible in the general conduct of current City business.

Total Retention Period is the total length of time that a particular record is retained by the City before it is disposed of in accordance with this Policy. The “Retention Periods” for City records are identified on the Record Retention Schedules.

The retention period is indicated by alphanumeric retention codes. The retention codes are used to indicate when the retention period begins and the length of time the record must be maintained. The retention code has two components: The alpha code represents when the retention period begins. The numeric code represents the length of time in years that records must be kept after the retention period begins.

For example, a retention code of AA+ 4 means that a record's retention period begins after completion of the audit and must be kept for four years thereafter. A legend of the records retention codes is included in the Records Retention Policy.

- **Citations and Legal Basis.** Identifies relevant state and federal codes and statutes. A legend of the state and federal code citations is included in the Records Retention Policy.

With the consent of the City Clerk, City Manager, and City Attorney, updates are authorized to be made to the Records Retention Schedule without further action by the City Council.

## RECORDS PURGE

Most records are filed chronologically by year, which facilitates records purge for destruction.

At least annually the City Departments are responsible for reviewing all records listed on their schedule. All records which have reached the end of their retention period are to be destroyed.

In the case of grants, where the conditions of the grant require a longer retention period such conditions shall supersede this policy.

## APPROVALS

All original records to be destroyed must be listed and approved by the department head and be approved by the City Attorney prior to their destruction.

## RECORDS DESTRUCTION

The approved listing of the destroyed documents shall be filed in the Office of the City Clerk.

**RECORDS RETENTION LEGEND:**

AA - After Audit  
 AC - After Completion/Closure  
 ACT - While Active  
 AE - After Expiration  
 AFP - After Final Payment  
 AP - After Approval  
 AR - Annual Review  
 AT - After Termination  
 C – Confidential  
 CM - Current Month  
 CY - Current Year  
 EY - Event Year  
 H – Historical  
 IND – Indefinite  
 LOB/LOV/LOI/LOS - Life of Board, Building, Vehicle, Improvement or System  
 P – Permanent  
 S - After Superseded  
 V - Vital, +[Number] - Plus Years or Months

**CITATIONS AND LEGAL CITATIONS LEGEND:**

B&P - Business and Professions  
 CAC - California Administrative Code  
 CCP - Code of Civil Procedure  
 CCR - Code of California Regulations  
 CEQA - California Environmental Quality Act  
 CFR - Code of Federal Regulations  
 EC - Election Code  
 FMLA - Family & Medical Leave Act, 1993  
 GC - Government Code  
 H&S - Health & Safety  
 HUD - Housing and Urban Development  
 OSHA – Occupational Safety & Health Act  
 PC - Penal Code  
 POST - Police Officers Standards Training  
 UFC - Uniform Fire Code  
 USC - United States Code  
 WIC - Welfare & Institutions Code

City of Brisbane  
Record Retention Schedules and UFIRST Index

01-00-00 GENERAL ADMINISTRATIVE & OPERATIONAL FUNCTION

Legend: AA - After Audit, AC - After Completion/Closure, ACT - While Active, AE - After Expiration, AFP - After Final Payment, AP - After Approval, AR - Annual Review, AT - After Termination, C - Confidential, CM - Current Month, CY - Current Year, EY - Event Year, H - Historical, IND - Indefinite, LOB/LOV/LOI/LOS - Life of Board, Building, Vehicle, Improvement or System, P - Permanent, S - After Superseded, V - Vital, +[Number] - Plus Years or Months

Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>01-01-00</b>	<b>General Management Group</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
01-01-01	Correspondence & Reports	Correspondence and reports from outside sources.	All Depts		CY+2, AR	CY+2, AR	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines
01-01-02	Correspondence & Reports - Departmental	General correspondence to other departments or divisions within the City.  Review record series annually.	All Depts		CY+2, AR	CY+2, AR	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines
01-01-03	Departmental Goals/Objectives	Goals and objectives for departmental activities.	All Depts		S	S+5	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines recommends retaining for 5 years after superseded.
01-01-04	Policies & Procedures	City policies and procedures.	All Depts		S	S+5	GC 34090; 2 year minimum requirement CCP 343; 4 years to commence action Administrative Record, State of California Guidelines recommends retaining for 5 years after superseded.
<b>01-02-00</b>	<b>Office Reference Group</b>						
01-02-01	General Information	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
01-02-02	Complaint Files	General complaints to City departments. Does not include claims against the City.	All Depts		AC+2	AC+7	42 USC 1983; Settlement of complaint plus 7 years
01-02-03	Historical Information/Events	Check documents for historical/archival value. Review series annually.	All Depts	H	CY+2	P	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Retain permanently for historical value
01-02-04	Community Information/Events	Check documents for historical/archival value. Review series annually.	All Depts	H	CY+2, AR	CY+2, AR	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Current year plus 2 years, review annually for historical content
01-02-05	Public Relations Information/Handouts/Speeches/Biographies	Check documents for historical/archival value. Review series annually.	All Depts	H	EY+2, AR	EY+7, AR	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 7  Administrative Decision: Review before destruction for potential historical content and reclassification to Historical Information/Events as a permanent record.
01-02-06	Mailing Address & E-mail Lists		All Depts		S	S	Administrative Record, State of California Guidelines



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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
01-02-07	City Sponsored Events	Includes reports, memos, correspondence, scripts, supplier information, assignments, deployments, supporting documentation.  Check documents for historical/archival value. Review series annually.	All Depts	H	CY+2, AR	<b>CY+2, AR</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Current year plus 2 years, review annually for historical content
01-02-08	Technical Reference	Manuals, guidelines and reference materials for general office management and equipment.	All Depts		ACT	<b>ACT</b>	GC 34090.7; Duplicates and reference materials may be destroyed within the 2 year minimum.
01-02-09	Membership Dues	Electronic record.	All Depts		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines
01-02-10	Fliers, Letters, Mailers to the Community	Check documents for historical/archival value. Review series annually.	All Depts	H	EY+2, AR	<b>EY+7, AR</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 7  Administrative Decision: Review before destruction for potential historical content and reclassification to Historical Information/Events as a permanent record.
<b>01-03-00</b>	<b>Records Management Program Group</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
01-03-01	UFIRST Index	Current version of the Uniform Functional Index of Record Series Terminology™ (UFIRST™).	All Depts		S+4	<b>S+4</b>	CCP 343; 4 years to commence action State of California Guidelines; 4 years after superseded.
01-03-02	Inactive Records & Archives	Inventories and indices of inactive records.	All Depts		S+2	<b>S+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded
01-03-03	Active Filing Systems		All Depts		S+2	<b>S+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded
01-03-04	Retention Scheduling	Includes all approved records retention schedules, research and working documents.	All Depts		S+4	<b>S+4</b>	CCP 343; 4 years to commence action State of California Guidelines; 4 years after superseded.
01-03-05	Certificates of Destruction		All Depts		P	<b>P</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded  Administrative Policy: Permanent for destruction tracking purposes.
01-03-06	Microforms	Inventory and indices of microfilmed materials.	All Depts		S+2	<b>S+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded
01-03-07	Vital Records Protection Program		All Depts		S	<b>S+5</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines recommends retaining for 5 years after superseded.
01-03-08	Public Records Requests		All Depts		AC+2	<b>AC+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion

01-00-00 GENERAL ADMINISTRATIVE & OPERATIONAL FUNCTION

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>01-04-00</b>	<b><u>Forms, Labels &amp; Graphics Management Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
01-04-01	Samples		All Depts		ACT	<b>ACT</b>	Administrative Record, State of California Guidelines
01-04-02	Blank Forms		All Depts		S	<b>S</b>	Administrative Record, State of California Guidelines
01-04-03	Form Letters		All Depts		S	<b>S</b>	Administrative Record, State of California Guidelines
01-04-04	Form Masters / Originals		All Depts		S	<b>S</b>	Administrative Record, State of California Guidelines
01-04-05	Forms Development		All Depts		S	<b>S</b>	Administrative Record, State of California Guidelines
<b>01-05-00</b>	<b><u>Organizations &amp; Associations Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
01-05-01	Professional Associations & Organizations	General correspondence, meeting notices, annual reports, working documents, etc.	All Depts		CY+2	<b>CY+2</b>	GC 34090d; 2 year minimum requirement Administrative Record, State of California Guidelines
01-05-02	Community Associations & Organizations	General correspondence, meeting notices, annual reports, working documents, etc.	All Depts		CY+2	<b>CY+2</b>	GC 34090d; 2 year minimum requirement Administrative Record, State of California Guidelines
01-05-03	Regional Associations & Organizations	General correspondence, meeting notices, annual reports, working documents, etc.	All Depts		CY+2	<b>CY+2</b>	GC 34090d; 2 year minimum requirement Administrative Record, State of California Guidelines

**02-00-00 CITY MANAGEMENT FUNCTION**

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>02-01-00</b>	<b><u>Council Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
02-01-01	City Council Subcommittee Agenda & Report	Original agendas and special meeting notices, including certificates of posting, original summaries, original communications and action agendas for Council.	Clerk		CY+2	CY+4	GC 34090; 2 years minimum  Administrative Decision: Maintain for the current year plus 4 years for reference purposes.
02-01-02	Agenda Packets	Includes letters, memos, staff reports, and documents received, created and/or submitted to Council.	Clerk		PERM	PERM	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2  Administrative Decision: Permanent for reference purposes.
02-01-03	Minutes	Official minutes of the City Council	Clerk		PERM	PERM	GC 34090(e); Minutes of governing bodies, Permanent GC 36814; Maintain record of proceedings GC 40801; Maintain record of proceedings State of California Guidelines; Permanent
02-01-04	Legal Notices	Includes public notices and legal publications for council, boards, commissions and committee meetings, and other legal publication requirements.	Clerk		CY+2	CY+4	GC 34090; 2 year minimum requirement CCP 343; Statutes of limitations, 4 years
02-01-05	Letter/Memos/Reports to Council	Petitions submitted to legislative bodies. Does not include petitions for elections or Baylands related documents.	Clerk		CY+2	CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years for management reports
02-01-06	Closed Sessions	Closed confidential meetings of the City Council.	Clerk		PERM	PERM	GC 34090(e); Minutes of governing bodies, Permanent GC 36814; Maintain record of proceedings GC 40801; Maintain record of proceedings State of California Guidelines; Permanent
02-01-07	Letter/Memos/Reports/Correspondence - Baylands	All Baylands related correspondence, studies, surveys and reports.	Clerk		CY+2	AC+5	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years for management reports  Administrative Decision: Maintain Baylands working documents and correspondence for 5 years after completion for historical and reference purposes.
<b>02-02-00</b>	<b><u>Board, Commission &amp; Committee Membership Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
02-02-01	Rosters, Membership & Oaths	Attendance reports, communications to staff liaisons, training and resource materials, appointment, oaths of office, termination and leave of absense correspondence, programmatic rules review, research and analysis.			CY+2	LOB+5	GC 34090; 2 years minimum GC 36814; Maintain record of proceedings GC 40801; Maintain record of proceedings State of California Guidelines; 5 years after board, commission or committee is dissolved.

**02-00-00 CITY MANAGEMENT FUNCTION**

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
02-02-02	Applications, Selected				AT+5	<b>AT+5</b>	GC 34090; 2 years minimum GC 40801; Maintain record of proceedings State of California Guidelines; 5 years after term of office
02-02-03	Applications, Not Selected				AC+2	<b>AC+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; maintain not selected applications for 2 years after completion
02-02-04	Correspondence	General correspondence to the City and from the City. Excludes Baylands and Public Comment			CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
<b>02-03-00</b>	<b><u>General City Management Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
02-03-01	Bids	Includes successful bids, RFQs & RFPs.  Unsuccessful bids, RFQs and RFPs may be destroyed after the Current Year plus 2 years.	All Depts		AC+5	<b>AC+5</b>	GC 34090; 2 years minimum CCP 337; Statute of limitations State of California Guidelines; 5 years after audit for successful bids.  Administrative Decision: 5 years after completion of project associated with the bid.
02-03-02	City Franchises & Utilities	Includes agreements and contracts, grants of easement, construction of improvements.  Working papers follow 01-01-02 Correspondence & Reports, External - Current Year + 2	Clerk		AE+2	<b>P</b>	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000 State of California Guidelines; Permanent
02-03-03	Strategic Planning Projects	Final strategic plan for project.  Workpapers may be destroyed 2 years after final plan is approved.	All Depts		AC+2	<b>PERM</b>	GC 34090; 2 years minimum State of California Guidelines; 2 years after superseded  Administrative Decision: Permanent for historical purposes.
02-03-04	Community Projects and Events	Check documents for historical/archival value. Review series annually.	All Depts		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines
02-03-05	Community Programs and Issues	Check documents for historical/archival value. Review series annually.	All Depts		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines
02-03-06	Press Releases	Check documents for historical/archival value. Review series annually.	All Depts		EY+2	<b>EY+7</b>	GC 34090; 2 years minimum State of California Guidelines; Current year plus 7
<b>02-04-00</b>	<b><u>Studies &amp; Surveys Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.

02-00-00 CITY MANAGEMENT FUNCTION

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
02-04-01	City-Generated General Reference Studies	Non-fiscal reports, performance audits, or administrative planning studies submitted to the City Manager, Mayor, or State Agency, on the performance of a department, program, or project, or for administrative planning purposes. Includes those prepared by consultants under contract with the City. Also includes reports or studies prepared by order or request of a governing body (as reflected in its minutes), or ordered or requested by a federal or state agency or court.	All Depts		AC+2	AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for general studies and surveys
02-04-02	Other Agency-Generated Studies	Reports or studies prepared by outside agencies.	All Depts		AC+2	AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for general studies and surveys
<b>02-05-00</b>	<b><u>Group Available for Use</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
<b>02-06-00</b>	<b><u>Group Available for Use</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
<b>02-07-00</b>	<b><u>City Manager Working Files</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
02-07-01	Planning	Department related project files	Manager		AC+2	AC+2	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines
02-07-02	Community Planning	Department related project files	Manager		AC+2	AC+2	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines
02-07-03	Economic Development	Department related project files	Manager		AC+2	AC+2	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines
02-07-04	Financial Management	Department related project files	Manager		AC+2	AC+2	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines
02-07-05	City Management Projects	Includes correspondence, working documents, reports, and other information related to projects initiated by the City Manager.	Manager		AC+2	AC+2	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines
02-07-06	City Work Plan	Includes long term planning, goal setting, state of the City and other planning documents.	Manager		AC+2	AC+2	GC 34090; 2 years minimum State of California Guidelines; 2 years after superseded

02-00-00 CITY MANAGEMENT FUNCTION

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
02-07-07	City Manager Committees	Includes Library JPA, San Bruno Mountain HCP Trust, San Mateo Co Pre Hospital Emergency JPA, San Mateo Co Training Consortium and other committees attended by the City Manager.	Manager		CY+2	CY+2	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines

03-00-00 LEGAL & LEGISLATIVE

Legend: AA - After Audit, AC - After Completion/Closure, ACT - While Active, AE - After Expiration, AFP - After Final Payment, AP - After Approval, AR - Annual Review, AT - After Termination, C - Confidential, CM - Current Month, CY - Current Year, EY - Event Year, H - Historical, IND - Indefinite, LOB/LOV/LOI/LOS - Life of Board, Building, Vehicle, Improvement or System, P - Permanent, S - After Superseded, V - Vital, +[Number] - Plus Years or Months

Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>03-01-00</b>	<b><u>Legislative Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
03-01-01	Ordinances		Clerk		PERM	<b>PERM</b>	GC 34090(e); Permanent for decisions of the City GC 40806; Maintain State of California Guidelines; Permanent
03-01-02	Resolutions		Clerk		PERM	<b>PERM</b>	GC 34090(e); Permanent for decisions of the City GC 40806; Maintain State of California Guidelines; Permanent
03-01-03	Legislation/Bills/Propositions Passed		Clerk		CY+4	<b>CY+4</b>	GC 34090; 2 year minimum requirement
03-01-04	Court Decisions		Attorney		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
03-01-05	Grand Jury Investigations/Reports		Attorney		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
03-01-06	Articles of Incorporation / Bylaws		Clerk		PERM	<b>PERM</b>	GC 34090(e); Permanent for decisions of the City GC 34460; Maintain charter in archives GC 40801; Maintain State of California Guidelines; Permanent
03-01-07	Proclamations	Not legislative resolutions. Proclamations not assigned to a resolution or ordinance number. Filed electronically.	Clerk		CY+2	<b>CY+2</b>	GC 34090; 2 years minimum GC 6253; Public records
03-01-08	Commendations	Not legislative resolutions. Commendations not assigned to a resolution or ordinance number. Filed electronically.	Clerk		CY+2	<b>CY+2</b>	GC 34090; 2 years minimum GC 6253; Public records
<b>03-02-00</b>	<b><u>Elections Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
03-02-01	Elections	Records used to compile final election results, including tally sheets, voting machine tabulation, detailed breakdown of results, special election results are kept 10 Years After Election Closes, since originals are kept with the County.  Proof of publication and copies of documents kept 2 Years After Election Closes.	Clerk		AC+5	<b>AC+5</b>	EC 17000-1; Affidavits and indexes are 5 years EC 17300; 5 years after election for election rosters EC 17302-6; 6 months after election, if no contest, for election records GC 81009; Campaign reports, not including candidate's campaign statements GC 34090.7; Duplicate copies may be destroyed at any time if the City Council has prescribed a procedure for destruction of duplicates per GC 34090.7. Non-records may be destroyed at any time. For all election documents where the State's requirement is permanent, but for which the County maintains the original documents.
03-02-02	Election Forms & Applications	Successful nominations.  Unsuccessful nominations are kept 2 Years After Election Closes.	Clerk		AT+2	<b>AT+2</b>	EC 17100; 4 years after expiration of term, nomination documents and signatures State of California Guidelines; 2 years after election closes for Unsuccessful nominations.

**03-00-00 LEGAL & LEGISLATIVE**

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
03-02-03	Initiatives, Referendum, Recall Petitions	Petitions are kept 9 Months After Election Closes.	Clerk		AC+1	<b>AC+1</b>	EC 17200; 8 months after election closes for initiative and referendum petitions. EC 17400; 8 months after election/final examination for election recall petitions.  Administrative Decision: Maintain petitions for 1 year after election closes for simplicity of destruction.
<b>03-03-00</b>	<b><u>City Attorney Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
03-03-01	Litigation - General Cases		Attorney		AC+1	<b>AC+7</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 7 years after closure for case records; maintain high profile cases permanently.
03-03-02	Ordinance Review	Notes for ordinances reviewed as to form.	Attorney		AC+2	<b>AC+2</b>	GC 34090; 2 year minimum requirement
03-03-03	Litigation - High Profile		Attorney		AC+1	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 7 years after closure for case records; maintain high profile cases permanently.
<b>03-04-00</b>	<b><u>General Legal Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
03-04-01	Agreements/Contracts/MOUs - General City	General city agreements and contracts.  Does not include Capital Improvement Project Construction agreements and contracts, which are kept PERMANENTLY. See Capital Improvement Projects for citations.	Clerk		AC+2	<b>AC+5</b>	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
03-04-02	Claims By/Against the City	Claims paid or denied	Clerk		AC+2	<b>AC+6</b>	GC 34090; 2 year minimum requirement 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. State of California Guideline; 5 years after settlement or closure
03-04-03	Series Available for Use						
03-04-04	Deeds		Clerk		PERM	<b>PERM</b>	GC 34090(a); Permanent for land and property related documents 24 CFR 1710; Permanent
03-04-05	Quitclaim Deeds	Duplicates of county documents.  Citations: GC 34090; 2 year minimum requirement State of California Guidelines; Permanent	Clerk		PERM	<b>PERM</b>	GC 34090(a); Permanent for land and property related documents 24 CFR 1710; Permanent



03-00-00 LEGAL & LEGISLATIVE

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
03-04-06	Annexations	Includes reports, agreements, public notices.	Clerk		PERM	<b>PERM</b>	GC 34090(a); Permanent for land and property records. State of California Guidelines; Permanent
03-04-07	Easements		Clerk		PERM	<b>PERM</b>	GC 34090(a); Permanent for land and property related documents 24 CFR 1710; Permanent
03-04-08	Assessment Districts		Clerk		CY+2	<b>PERM</b>	GC 34090(a); Permanent for land and property records CCP 338; 3 year statute of limitations State of California Guidelines; Permanent
03-04-10	Bonds	Final bond documentation	Clerk		AC+2	<b>AC+10</b>	GC 34090; 2 years minimum GC 43900-43903; Destruction guidelines for bonds CCP 337.5; Statutes of limitations, 6 years after expiration FC 3368; Maintain FC 30210; Maintain State of California Guidelines; 10 years after closure/expiration
03-04-11	Property Acquisition & Disposition		Clerk		AC+2	<b>AC+10</b>	GC 34090; 2 years minimum GC 6254; Record disclosure CCP 337.1; 4 years after completion of construction or improvement CCP 337.15; 10 years after completion of construction or improvement 36 CFR 64.11; 3 years after last payment for public property acquisition. State of California Guidelines; Completion expiration + 10 years for acquisitions.
03-04-12	Development Agreements	Includes infrastructure contracts and franchises  Working papers may be retained for the Current Year + 2	Clerk		AE+5	<b>PERM</b>	GC 34090(a), Real property records, maintain CCP337, 337.1(a), 337.15; Statutes of limitations 48 CFR 4.703; 3 years after final payment 48 CFR 4.705-1; 4 years after completion for accounting, payroll, purchasing records, et. al. H&S 19850; Life of Building, with exceptions.
<b>03-05-00</b>	<b><u>Agencies Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
03-05-01	Federal Agencies	Correspondence & reports not attached to contracts, agreements or specific projects.  Retention is Current Year + 2 with Review for content.	All Depts		REV	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record
03-05-02	State Agencies	Correspondence & reports not attached to contracts, agreements or specific projects.  Retention is Current Year + 2 with Review for content.	All Depts		REV	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record

03-00-00 LEGAL & LEGISLATIVE

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
03-05-03	Regional/National Agencies	Correspondence & reports not attached to contracts, agreements or specific projects.  Retention is Current Year + 2 with Review for content.	All Depts		REV	CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record
03-05-04	County Agencies	Correspondence & reports not attached to contracts, agreements or specific projects.  Retention is Current Year + 2 with Review for content.	All Depts		REV	CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record
03-05-05	Other Cities	Correspondence & reports not attached to contracts, agreements or specific projects.  Retention is Current Year + 2 with Review for content.	All Depts		REV	CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record
03-05-06	Special Districts/Agencies	Correspondence & reports not attached to contracts, agreements or specific projects.  Retention is Current Year + 2 with Review for content.	All Depts		REV	CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record
03-05-07	School Districts	Correspondence & reports not attached to contracts, agreements or specific projects.  Retention is Current Year + 2 with Review for content.	All Depts		REV	CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Administrative Record

03-00-00 LEGAL & LEGISLATIVE

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
03-06-00	<u>Group Available for Use</u>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
03-07-00	<u>Grants Program Group</u>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
03-07-01	Federal Grants	Refer to grant application close -out procedure. Retention may vary depending upon grant details.	All Depts		AFP+2 *	AFP+5 *	21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report 29 CFR 97.42; grants must be kept for 3 years after final expenditure report. State of California Guidelines; 5 years after grant closure. * State recommends referring to grant application close-out procedures, if any.
03-07-02	State Grants	Refer to grant application close -out procedure. Retention may vary depending upon grant details.	All Depts		AFP+2 *	AFP+5 *	21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report 29 CFR 97.42; grants must be kept for 3 years after final expenditure report. State of California Guidelines; 5 years after grant closure. * State recommends referring to grant application close-out procedures, if any.
03-08-00	<u>Fair Political Practices Commission Group</u>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
03-08-01	Campaign Statements - Elected	FPPC Campaign Financial Disclosure Statements for Elected officials and candidate controlled and/or committees primarily formed to support or oppose them. Filing obligation exists until committee is terminated. Includes noticing and processing correspondence.	Clerk		AT+4	PERM	GC 81009(b); maintain elected indefinitely

Record Retention Schedules and UFIRST™ Index

03-00-00 LEGAL & LEGISLATIVE

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
03-08-02	Statements of Economic Interest	Form 700 for both designated employees, elected officials and consultants.	Clerk		AC+2	<b>AC+7</b>	GC 81009(f); 4 year requirement for copies  Administrative Decision: Maintain all forms for 7 years per GC 81009(e) for consistency
03-08-03	Campaign Statements - Unsuccessful	FPPC Campaign Financial Disclosure Statements for unsuccessful candidates for office including committees that directly support or oppose them. Filing obligation exists until committee is terminated. Includes noticing and processing correspondence.	Clerk		AC+1	<b>AC+5</b>	GC 81009(b); 5 years for unsuccessful candidates

04-00-00 HUMAN RESOURCES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>04-01-00</b>	<b>Personnel Data Group - Full-time</b>	All personnel related materials and correspondences. Does not include medical leave records, worker's compensation or PERS information.	All Depts	C	AT+1	<b>AT+6</b>	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 years after termination or action State of California Guidelines; 3 years after termination
04-01-01	General Information & Miscellaneous Data	All personnel related materials and correspondences. Includes PERS applications and beneficiary information. Does not include medical leave records or worker's compensation.	HR	C	AT+1	<b>AT+6</b>	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 years after termination or action State of California Guidelines; 3 years after termination
04-01-02	Personnel Action Forms	All personnel related materials and correspondences. Does not include medical leave records, worker's compensation or PERS information.	HR	C	AT+1	<b>AT+6</b>	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 years after termination or action State of California Guidelines; 3 years after termination
04-01-03	Performance Evaluations	All personnel related materials and correspondences. Does not include medical leave records, worker's compensation or PERS information.	HR	C	AT+1	<b>AT+6</b>	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 years after termination or action State of California Guidelines; 3 years after termination
04-01-04	Education & Training	All personnel related materials and correspondences. Does not include medical leave records, worker's compensation or PERS information.	HR		AT+1	<b>AT+6</b>	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 years after termination or action State of California Guidelines; 3 years after termination
04-01-05	Commendations & Complaints	All personnel related materials and correspondences. Does not include medical leave records, worker's compensation or PERS information.	HR	C	AT+1	<b>AT+6</b>	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 years after termination or action State of California Guidelines; 3 years after termination
04-01-06	Background	All personnel related materials and correspondences. Does not include medical leave records, worker's compensation or PERS information.	HR	C	AT+1	<b>AT+6</b>	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 years after termination or action State of California Guidelines; 3 years after termination
04-01-07	Contract Employee Data	All personnel related materials and correspondences. Does not include medical leave records, worker's compensation or PERS information.	HR	C	AT+1	<b>AT+6</b>	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 years after termination or action State of California Guidelines; 3 years after termination

04-00-00 HUMAN RESOURCES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
04-01-08	Councilmembers Data	All personnel related materials and correspondences. Does not include medical leave records, worker's compensation or PERS information.	HR	C	AT+1	<b>AT+6</b>	29 CFR 1627.3 - 4; 3 years after termination 29 CFR 1602.30 - 32; 2 - 3 years after termination 29 CFR 516.5 - 6; 3 years after action 29 USC 1113; 6 years after date of last action GC 12946; 2 years after termination or action State of California Guidelines; 3 years after termination
04-01-09	Volunteers		HR	C	AT+2	<b>AT+2</b>	GC 34090; 2 years minimum State of California Guidelines; 2 years after termination/separation
04-01-10	Internal Investigations	Includes citizen complaints and all investigative documents related to the complaint.	IA	C	CY+5	<b>CY+5</b>	PC 832.5(b) Statutory minimum is 5 years. EVC 1045; 5 years for conduct PC 801.5; 4 years to commence prosecution PC 803(c); public officer, crime descriptions VC 2547; SOL of 3 years for officer fraud GC 12946; 2 years after completion/position filled
<b>04-02-00</b>	<b>Group Available for Use</b>						
<b>04-03-00</b>	<b>Personnel Recruitment Group</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
04-03-01	Job Announcements / Information		HR		AC+3	<b>AC+3</b>	GC 12946; 2 years after completion/position filled 29 CFR 1602.14; 1 year after position filled 29 CFR 1627.3; 1 year after position filled State of California Guidelines; 3 years after completion/position filled
04-03-02	Applications & Resumes		HR		AC+3	<b>AC+3</b>	GC 12946; 2 years after completion/position filled 29 CFR 1602.14; 1 year after position filled 29 CFR 1627.3; 1 year after position filled State of California Guidelines; 3 years after completion/position filled
04-03-03	Equal Opportunity Employment / EEOC	Hired employees, non-sworn:  Hired employees, sworn:  Applicants who filed a complaint:	HR		AT+2  AT+5  AC+2	<b>AT+2</b>  <b>AT+5</b>  <b>AC+2</b>	GC 34090; 2 year minimum requirement GC 12946; 2 years after completion 29 CFR 1602.14; 1 year after action/change 29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; 2 years after termination for general employees, 5 years after termination for safety employees
04-03-04	Testing Information		HR		AC+3	<b>AC+3</b>	GC 12946; 2 years after completion/position filled 29 CFR 1602.14; 1 year after position filled 29 CFR 1627.3; 1 year after position filled State of California Guidelines; 3 years after completion/position filled

04-00-00 HUMAN RESOURCES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
04-03-05	Disqualified at Background	Retention period based on position closure at the end of the fiscal year.	HR		AC+2	<b>AC+2</b>	GC 34090; 2 year minimum requirement State of California Recommendations; 2 years after position is filled
<b>04-04-00</b>	<b><u>Personnel Management Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
04-04-01	Position Information/Job Descriptions		HR		SUP+5	<b>SUP+5</b>	GC 34090; 2 year minimum requirement  Administrative Decision: Maintain job description for 5 years after superseded to meet the minimum requirement and method of managing the documents.
04-04-02	Rules, Regulations & Policies		HR		SUP+2	<b>SUP+5</b>	GC 34090; 2 year minimum requirement State Recommendation; 2 years after superseded
04-04-03	Reclassifications	Approved reclassifications are maintained in the employee's file.  Unapproved reclassifications are maintained with the quarterly organizational changes. May include salary survey information.	HR	C	AT+2  AC+2	<b>AT+5</b>  <b>AC+2</b>	GC 34090; 2 year minimum requirement GC 12946; 2 years after completion/position filled 29 CFR 516.6(2); 2 years for wage rate tables, etc. 2 CCR 570.5; 5 years for pay schedules and special compensation records 29 CFR 1602.14; 1 year after action/change State of California Guidelines; Retain records for the current year they are drafted, plus two additional years.
04-04-04	Salary Surveys		HR		AC+2	<b>AC+2</b>	GC 34090; 2 year minimum requirement GC 12946; 2 years after completion/position filled 29 CFR 516.6(2); 2 years for wage rate tables, etc. 29 CFR 1602.14; 1 year after action/change State of California Guidelines; Retain records for the current year plus 2 years.
04-04-05	Employee Training	Group training programs and sessions. Employee applications, volunteer program training, class training materials and internship records for non-safety related positions are kept for the Current Year + 7 years. Safety related certificates and designations are kept for the Current Year + 2 years.	HR		CY+7	<b>CY+7</b>	GC 34090; 2 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records. Current year plus 2 years for certificates and designations training.
<b>04-05-00</b>	<b><u>Medical &amp; Compensation Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.

04-00-00 HUMAN RESOURCES

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04-05-01	Worker's Compensation Claims	Claims and original papers.	HR	C	AT+1	<b>PERM</b>	8 CCR 15400; Maintain reports 8 CCR 15400.2; 5 years 8 CCR 10102; 5 years LC 129(a); 5 years for auditing State of California Guidelines; Permanent for workers compensation working files (claim files, reports, incidents). Originals filed with third party administrator.
04-05-02	Medical Records	Includes general employees and public safety employees. Also includes LTD reports for individuals.	HR	C	AT+1	<b>AT+30</b>	8 CCR 15400; Maintain reports LC 110 - 139.6; 5 years for auditing LC 6410; OSHA, maintain 29 CFR 1627.3(b)(1); 1 year from action 29 CFR 1910.1020; 30 years after employee termination State of California Guidelines; 30 after completion/closure
04-05-03	Worker's Compensation Loss Reports & OSHA 300 Logs		HR		CY+2	<b>CY+5</b>	8 CCR 15400; Maintain reports 8 CCR 15400.2; 5 years 8 CCR 10102; 5 years LC 129(a); 5 years for auditing State of California Guidelines; State recommends Permanent retention, but no relevant statutes; Risk Management Reports (including Loss Analysis Reports) are 5 years after completion/closure.
04-05-04	Family Medical Leave Act Requests		HR	C	AT+1	<b>AT+30</b>	Family Medical Leave Act 1993 OSHA 8 CCR 15400; Maintain reports LC 110 - 139.6; 5 years for auditing LC 6410; OSHA, maintain 29 CFR 1627.3(b)(1); 1 year from action 29 CFR 1910.1020; 30 years after employee termination State of California Guidelines; 30 after completion/closure



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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>04-06-00</b>	<b>Salary/Wage/Benefits Group</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
04-06-01	Pay & Classification Plan	Does not include records for specific employees.	HR		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement GC 12946; 2 years after completion/position filled 29 CFR 516.6(2); 2 years for wage rate tables, etc. 2 CCR 570.5; 5 years for pay schedules and special compensation records 29 CFR 1602.14; 1 year after action/change State of California Guidelines; Retain records for the current year they are drafted, plus two additional years
04-06-02	Deferred Compensation Plan Administration	Applications, brochures and general Plan information. Does not include denied enrollment or claims.	HR		SUP	<b>SUP+2</b>	GC 34090; 2 year minimum requirement GC 12946; 2 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; 2 years after action
04-06-03	Health Benefit Claims	Includes denied enrollment or claims.	HR		CY+2	<b>PERM</b>	8 CCR 15400; Maintain reports LC 110 - 139.6; 5 years for auditing LC 6410; OSHA, maintain 29 CFR 1627.3(b)(1); 1 year from action 29 CFR 1910.1020; 30 years after employee termination State of California Guidelines; Permanent for benefit plan claims
04-06-04	Public Employees Retirement System - CalPERS	Includes PERS amendments.	HR		SUP	<b>PERM</b>	GC 34090; 2 year minimum requirement GC 12946; 2 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; Permanent for PERS documents
04-06-05	Long-Term Disability & Life Insurance	General plan information. Does not include denied enrollment or claims.	HR		SUP	<b>SUP+2</b>	GC 34090; 2 year minimum requirement GC 12946; 2 years after submission or creation 29 CFR 1627.3(b)(2) EEOC/ADEA requires 1 year after benefit plan termination State of California Guidelines; 2 years after action
04-06-06	Other Employee Services/Benefits	Non-medical and/or non-insurance related employee services, supplemental insurance, etc.	HR		CY+2	<b>AA+5</b>	GC 34090; 2 years minimum GC 12946; Personnel information, 2 years minimum 26 CFR 1.6001; Permanent for information showing payments, receipts and/or disbursements of taxes. FC 30210; Maintain, no specific retention GC 43900-43903; Bond records, notification to public of destruction State of California Guidelines; 5 years after audit

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<b>04-07-00</b>	<b>Labor Relations Group</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
04-07-01	Union Representatives/Organizations	General correspondence and information not pertaining to negotiations.	HR		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
04-07-02	Memorandums of Understanding		HR		SUP+2	<b>PERM</b>	29 USC 211c; Maintain, indefinite 29 CFR 516.5(b); 3 years State of California Guidelines; Recommend Permanent retention without relevant statutes or regulations cited.
04-07-03	Negotiations Administration	Negotiations with labor groups and employees, and original Memoranda of Understanding. Documents include notes, notebooks, correspondence, and contracts.	HR		CY+2	<b>PERM</b>	29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; Permanent
04-07-04	Grievances, Miscellaneous Employees		HR	C	AS+2	<b>AS+2</b>	GC 12946; 2 years after completion 29 CFR 1602.14; 1 year after action/change 29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; 2 years after termination for general employees, 5 years after termination for safety employees
04-07-05	Grievances, Public Safety Employees		HR	C	AS+5	<b>AS+5</b>	GC 12946; 2 years after completion 29 CFR 1602.14; 1 year after action/change 29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; 2 years after termination for general employees, 5 years after termination for safety employees
04-07-06	Interest Arbitrations Award	Awards and compensation given to units based on settled complaints.	HR		CY+4	<b>P</b>	29 USC 211c; Maintain, indefinite 29 USC 203m; Definitions 29 USC 207g; Definitions State of California Guidelines; Permanent

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<b>07-01-00</b>	<b><u>General Plan Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
07-01-01	General Plan & Elements	Including sphere of influence information, general plan, environmental impact reports, policy development, plan development reports/documents.  Workpapers must also be retained Permanently for completion of subsequent plan revisions and updates.	Planning		SUP	<b>PERM</b>	GC 34090(a); Real property records, maintain State of California Guidelines; Permanent
07-01-02	Series Available for Use						
07-01-03	Series Available for Use						
07-01-04	Baylands Planning	Permanent retention pertains to maps, plans, drawings, exhibits, and or photos for the project.	Planning		SUP	<b>PERM</b>	GC34090a; City owned property related documents. H&S 19850; Permanent for plans and maps State of California Guidelines; Permanent
<b>07-02-00</b>	<b><u>Planning Commission Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
07-02-01	Series Available for Use						
07-02-02	Agendas & Agenda Packets	Includes letters, memos, staff reports, and documents received, created and/or submitted to the Planning Commission	Planning		EY+2	<b>PERM</b>	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2  Administrative Decision; Permanent for detailed history of action minutes.
07-02-03	Minutes	Official minutes of the Planning Commission	Planning		EY+2	<b>PERM</b>	GC 34090e; Minutes of governing bodies, Permanent GC 36814; Maintain record of proceedings GC 40801; Maintain record of proceedings State of California Guidelines; Permanent
07-02-04	Legal Notices	Includes public notices and legal publications for the Planning Commission.	Planning		CY+2	<b>CY+4</b>	GC 34090; 2 year minimum requirement CCP 343; Statutes of limitations, 4 years
07-02-05	Series Available for Use						
07-02-06	Series Available for Use						
07-02-07	Rules of Procedure		Planning		SUP	<b>PERM</b>	GC 34090; 2 year minimum requirement CCP 343; 4 years to commence action Administrative Record, State of California Guidelines recommends retaining for 5 years after superseded.  Administrative Decision: Maintain permanently for reference purposes.

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<b>07-03-00</b>	<b>General Community Development Group</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
07-03-01	Series Available for Use						
07-03-02	Series Available for Use						
07-03-03	Series Available for Use						
07-03-04	Historic Planning Documents		Com Dev		PERM	<b>PERM</b>	GC 34090; 2 year minimum requirement Administrative Decision; Permanent for historical purposes
07-03-05	CEQA	General information materials. Review annually for project relevance			CY+2	<b>CY+5</b>	
07-03-06	Zoning Ordinance & Amendments				AC+10	<b>PERM</b>	GC 34090a; Real property records, maintain GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions.
07-03-07	Studies, Surveys & Reports - General	Engineering, joint powers, noise, transportation, etc. and other general studies. Review annually for project relevance.	Com Dev		AR	<b>AC+2</b>	GC34090d; 2 year minimum requirement State of California Guidelines; Completion of study plus 2 years
07-03-08	Series Available for Use						
07-03-09	Series Available for Use						
07-03-10	Series Available for Use						
07-03-11	Census		Com Dev		SUP+2	<b>SUP+10</b>	GC 34090; 2 year minimum requirement RCS Suggestion; 10 years after superseded for trending purposes
07-03-12	Series Available for Use						
07-03-13	Hazardous/Solid Waste	General information on hazardous and solid waste matters. Review annually for project relevance.  Does not include Hazardous Materials Storage Permits or hazardous waste disposal programs managed by the City.	Com Dev		CY+2	<b>CY+2</b>	GC34090d; 2 year minimum requirement
07-03-14	Habitat Conservation	General information materials. Review annually for project relevance.	Com Dev		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement  CHECK IN VERSATILE FOR FILES. CREATE A HABITAT CONSERVATION PLAN SERIES ABOVE.
07-03-15	Housing	General information materials. Review annually for project relevance.	Com Dev / Clerk		CY+7	<b>CY+7</b>	CHECK IN VERSATILE FOR FILES. POSSIBLY MAINTAIN FOR PLANNING.
07-03-16	Series Available for Use						
07-03-17	Seismic Hazards	Seismic hazards and retrofitting program.	Com Dev		CY+2	<b>PERM</b>	GC 34090(a); Real property records, maintain State of California Guidelines; Permanent
07-03-18	Series Available for Use						

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<b>07-04-00</b>	<b><u>Planning Applications Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
07-04-01	General Address Information	General correspondence and supporting information for permits and applications. Review annually for project relevance.	Com Dev		AC+5	<b>AC+5</b>	GC 34090; 2 year minimum requirement  Administrative Decision; maintain backup information for 5 years after completion of the project.
07-04-02	Building Permits	Including blueprints and specifications	Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-03	Use Permits	Including blueprints and specifications	Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-04	Variances	Including blueprints and specifications	Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-05	Exceptions	Including blueprints and specifications	Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-06	Sign Reviews	Including blueprints and specifications.  Does not include Temporary Sign Permits, which may be retained for 2 years after cancellation, per GC 34090d and State of California Guidelines.	Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions State of California Guidelines; Permanent
07-04-07	Design Permits	Including blueprints and specifications	Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent

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07-04-08	Environmental Reviews	Project files by address, including traffic, hazardous materials, groundwater, soil studies, exemptions, Environmental Impact Reports, mitigation monitoring, negative declaration, notices of completion and determination, comments, statements of overriding considerations  Correspondence and general issues on consultants or conservation may be destroyed 2 years after completion of review.	Com Dev		PERM	PERM	GC 34090a; Permanent CEQA Guidelines; Permanent State of California Guidelines; Permanent for CEQA materials
07-04-09	Tentative Maps	Includes tentative parcel maps and tentative tract maps.	Com Dev		PERM	PERM	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-10	Final Maps		Com Dev		PERM	PERM	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-11	Certificates of Compliance		Com Dev		PERM	PERM	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-12	Lot Line Adjustments		Com Dev		PERM	PERM	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-13	Planned Developments		Com Dev		PERM	PERM	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-14	Specific Plans		Com Dev		PERM	PERM	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain CC 1351; definitions, community property State of California Guidelines; Permanent

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
07-04-15	Code Enforcement - CONFIDENTIAL	Records are for building, housing and mobile home code violation records including inspections, public nuisance, rubbish and weed abatement, vehicle abatement, , intake forms about violation and reporting party, reports (contacts, investigation process, findings, disposition of the case), warning notices, photographs, notices of compliance.  DOES NOT INCLUDE recorded liens and releases, or Federal and State reports, which are kept permanently.	Com Dev	C	AC+5	<b>AC+5</b>	GC 34090; 2 year minimum requirement 40 CFR 141.33; 3 years for violation correction State of California Guidelines; 2 years after correction/completion  Administrative Decision; Maintain cases for 5 years for historical tracking.
07-04-16	Address Plans & Maps		Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-17	Miscellaneous Applications	Includes miscellaneous alterations, excavations, road, street sidewalks & curb alterations, transportation, swimming pool drainage, temporary uses, etc.  Does not include building, signs, grading, encroachment permits and associated plans and maps.	Com Dev		REV	<b>PERM</b>	GC 34090d; 2 year minimum requirement State of California Guidelines; 2 years after completion or closure for temporary use permits.  Administrative Decision: Review all miscellaneous permits for retention accuracy. Temporary Use Permits may be destroyed according to the State guidelines. Other permits should be retained permanently.
07-04-18	Rezoning Applications - Site Specific		Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions.
07-04-19	General Plan Amendments - Site Specific	Approved amendments.	Com Dev		AC+2	<b>PERM</b>	GC 34090; 2 year minimum requirement GC 65103; Designation to develop the General Plan GC 50110; Distribution of General Plan copies State of California Guidelines; Closure or completion plus 2 years  Administrative Decision: Maintain permanently to follow General Plan Amendment retention period.
07-04-20	Minor Modifications	Including blueprints and specifications	Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-21	Accessory Dwelling Units	Including blueprints and specifications	Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent

07-00-00 COMMUNITY DEVELOPMENT

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
07-04-22	Development Agreement	Including blueprints and specifications.	Com Dev		AC+4	<b>PERM</b>	GC 34090a; Real property records, maintain CCP337, 337.1(a), 337.15; Statutes of limitations 48 CFR 4.703; 3 years after final payment 48 CFR 4.705; 4 years after completion for accounting, payroll, purchasing records, et. al. GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions. State of California Guidelines; Permanent
07-04-23	Telecommunications Permits	Including blueprints and specifications.	Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-24	Grading Plan Review		Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
07-04-25	Accessibility Improvement Permit		Com Dev		PERM	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent



08-00-00 PUBLIC WORKS ADMINISTRATION & ENGINEERING

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>08-01-00</b>	<b><u>General Public Works Administration</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
08-01-01	General Information		PW Admin		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain for the current year plus 10 years for reference purposes.
08-01-02	Correspondence		PW Admin		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain for the current year plus 10 years for reference purposes.
08-01-03	Invoices	Duplicates. Finance is the Office of Record.	PW Admin		ACT	<b>ACT</b>	GC 34090.7; Duplicates and reference materials may be destroyed within the 2 year minimum.
08-01-04	Agreements/Franchises/ROW		PW Admin		P	<b>PERM</b>	GC 34090(a); Permanent for land and property related documents 24 CFR 1710; Permanent
08-01-05	SDS		PW Admin		CY+2	<b>CY+30</b>	29 CFR 1910.1020; Retain MSDS records for 30 years unless another record of what, where and when a chemical was used is maintained.
<b>08-02-00</b>	<b><u>City Engineer</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
08-02-01	Encroachment/Grading Permits		Eng		AC+2	<b>PERM</b>	GC 34090(a) Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions State of California Guidelines; Permanent for construction based encroachment permits.
08-02-02	Permits/Address File		Eng		AC+2	<b>PERM</b>	GC 34090(a) Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions State of California Guidelines; Permanent for construction based encroachment permits.
08-02-03	Floodplain Management	Includes elevation certificates and LOMRs	Eng		CY+10	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent for flood maps.

08-00-00 PUBLIC WORKS ADMINISTRATION & ENGINEERING

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>08-03-00</b>	<b><u>Development</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
08-03-01	Development Agreement Working Papers	Includes copies of agreements maintained by the City Clerk, and all working papers relating to the developer agreement.	Eng		AC+4	<b>PERM</b>	GC 34090(a), Real property records, maintain CCP337, 337.1(a), 337.15; Statutes of limitations H&S 19850; Life of Building, with exceptions. State of California Guidelines; Permanent
08-03-02	EIRs, Traffic Studies, WSAs		Eng		ACT	<b>ACT</b>	GC 34090.7; Duplicates and reference materials may be destroyed within the 2 year minimum.
08-03-03	Baylands		Eng		AC+4	<b>PERM</b>	GC 34090(a), Real property records, maintain CCP337, 337.1(a), 337.15; Statutes of limitations H&S 19850; Life of Building, with exceptions. State of California Guidelines; Permanent
<b>08-04-00</b>	<b><u>OES</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
08-04-01	EOC	Includes general information and correspondence.	PW Admin		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-04-02	EOP		PW Admin		S+2	<b>S+2</b>	GC 34090; 2 year minimum State of California Guidelines; 2 years after superseded
08-04-03	CERT		PW Admin		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-04-04	Events		PW Admin		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-04-05	LHMP		PW Admin		S+2	<b>S+10</b>	GC 34090; 2 year minimum State of California Guidelines; 2 years after superseded  Administrative Decision: Maintain for 10 years after superseded for reference purposes.
08-04-06	Training		PW Admin		CY+7	<b>CY+7</b>	GC 34090; 2 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records. Current year plus 2 years for certificates and designations training.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>08-05-00</b>	<b><u>Sustainability/OSEC</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
08-05-01	Open Space and Ecology Committee Admin		PW Admin		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain for the current year plus 10 years for reference purposes.
08-05-02	OSEC Council agenda items		PW Admin		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-05-03	Climate Action Plan		PW Admin		AC+5	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after completion for environmental review issues and conservation.  Administrative Decision: Maintain climate action information permanently after completion of the task for historical reference.
08-05-04	Events		PW Admin		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-05-05	Grants		PW Admin		AFP+1 *	<b>AFP+5 *</b>	21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report 29 CFR 97.42; grants must be kept for 3 years. State of California Guidelines; 5 years after grant closure. * State recommends referring to grant application close-out procedures, if any.
08-05-06	Open Space Plan		PW Admin		S+2	<b>S+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded for master plans.  Administrative Decision: Maintain open space plan for 5 years after superseded to track history of the plan.
08-05-07	Vegetation Management Activities		PW Admin		AC+2	<b>AC+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for weed abatement.  Administrative Decision: Maintain vegetation management activities for 5 years after completion for reference purposes.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
08-05-08	Minutes		PW Admin		PERM	PERM	GC 34090(e); Minutes of governing bodies, Permanent GC 36814; Maintain record of proceedings GC 40801; Maintain record of proceedings State of California Guidelines; Permanent
<b>08-06-00</b>	<b>Safety &amp; Training</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
08-06-01	Training Classes		PW Admin		CY+7	CY+7	GC 34090; 2 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records. Current year plus 2 years for certificates and designations training.
08-06-02	Audits		PW Admin		CY+2	CY+5	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. 8 CCP 3203(b)(1); Injury & Illness Prevention Program inspection records, maintain at least 1 year.  Administrative Decision: Possibility of defending an equitable indemnity claim up to 5 years
08-06-03	Safety Equipment Inspections		PW Admin		CY+2	CY+5	GC 34090; 2 year minimum requirement CCP 340.5; Healthcare providers; 3 years after occurrence or 1 year after the patient discovers the injury, whichever comes first. CCP 340.8; Exposure to hazardous substances; 2 years after exposure, or 2 years after patient discovers injury, whichever is later. 8 CCP 3203(b)(1); Injury & Illness Prevention Program inspection records, maintain at least 1 year.  Administrative Decision: Possibility of defending an equitable indemnity claim up to 5 years
<b>08-07-00</b>	<b>Fleet</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
08-07-01	RFQs and Quotes		PW Admin		AC+2	<b>AC+5</b>	GC 34090; 2 years minimum CCP 337; Statute of limitations State of California Guidelines; 5 years after audit for successful bids.  Administrative Decision: 5 years after completion of project associated with the bid.
08-07-02	Vehicle Maintenance Logs		PW Admin		LOV	<b>LOV+4</b>	GC 34090; 2 year minimum requirement CCP 343; 4 years for action State of California Guidelines state life of the vehicle plus 2 years for fuel, maintenance and repair records of vehicles. State does not reference any citations.
08-07-03	Vehicle Inspection Logs		PW Admin		LOV	<b>LOV+4</b>	GC 34090; 2 year minimum requirement CCP 343; 4 years for action State of California Guidelines state life of the vehicle plus 2 years for fuel, maintenance and repair records of vehicles. State does not reference any citations.
08-07-04	BIT Inspections		PW Admin		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement VC 3450.12; maintain inspection reports for at least 2 years. 25 month inspection period.
08-07-05	Hazardous Waste Manifests	Used for disposal of oil filters, used oil, sweeping compound and other hazardous waste materials.	PW Admin		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement 40 CFR 122.21; 3 to 5 years State of California Guidelines; Current year plus 10 years for hazardous waste disposal documents.
<b>08-08-00</b>	<b>Marina</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
08-08-01	Event Permits		PW Admin		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
08-08-02	Boater files		PW Admin		AE+2	<b>AE+7</b>	GC 34090; 2 year minimum retention State of California Guidelines; Current year plus 2 years for slip rental information, including payment invoices, inventory listings, billing correspondence and other related documents.  Administrative Decision: Maintain rental files for 7 years after expiration of the agreement for reference purposes.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
08-08-03	Daily Financial Journals		PW Admin		CY+2	<b>CY+7</b>	GC 34090; 2 year minimum retention State of California Guidelines; Current year plus 2 years for slip rental information, including payment invoices, inventory listings, billing correspondence and other related documents.  Administrative Decision: Maintain financial tracking for 7 years after expiration of the agreement for reference purposes.
08-08-04	Daily payment receipts		PW Admin		CY+2	<b>CY+7</b>	GC 34090; 2 year minimum retention State of California Guidelines; Current year plus 2 years for slip rental information, including payment invoices, inventory listings, billing correspondence and other related documents.  Administrative Decision: Maintain financial tracking for 7 years after expiration of the agreement for reference purposes.
08-08-05	Guest dock records	CY+2	PW Admin		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for dock slips.
08-08-06	Payment Records for Paid Marina Invoices	Supporting documents	PW Admin		CY+2	<b>CY+7</b>	GC 34090; 2 year minimum retention State of California Guidelines; Current year plus 2 years for slip rental information, including payment invoices, inventory listings, billing correspondence and other related documents.  Administrative Decision: Maintain financial tracking for 7 years after expiration of the agreement for reference purposes.
08-08-07	Hazardous Materials Files		PW Admin		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement 40 CFR 122.21; 3 to 5 years State of California Guidelines; Current year plus 10 years for hazardous waste disposal documents.
<b>08-09-00</b>	<b><u>Capital Improvement Programs</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
08-09-01	Council Agenda Items		Eng		AC+2	<b>AC+2</b>	GC 34090.7; Duplicates and reference materials may be destroyed within the 2 year minimum.  Administrative Decision: Maintain agenda items for 2 years after completion of project to support the CIP file.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
08-09-02	Design Studies (e.g., Geotech)		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-03	Engineers Estimate		Eng		AC+4	AC+10	CCP 337.15; 10 years State of California Guidelines; 10 years after project completion for capital improvement projects
08-09-04	Permits		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-05	ROW		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-06	CEQA/NEPA		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-07	Bid Tabulation		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-08	Certificates of Compliance/Material Submittals		Eng		AC+4	AC+10	CCP 337.15; 10 years State of California Guidelines; 10 years after project completion for capital improvement projects
08-09-09	Specs		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-10	Contract/Proposal		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-11	Change Orders		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-12	Invoices/Preliminary Notices		Eng		AC+4	AC+10	CCP 337.15; 10 years State of California Guidelines; 10 years after project completion for capital improvement projects
08-09-13	Correspondence		Eng		AC+2	AC+2	GC 34090; 2 year minimum Administrative Record, State of California Guidelines  Administrative Decision: Maintain project correspondence for 2 years after completion to support the CIP file.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
08-09-14	Daily/Weekly Inspection Reports/Diaries		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-15	Photos		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-16	Labor Compliance		Eng		AC+4	AC+10	CCP 337.15; 10 years State of California Guidelines; 10 years after project completion for capital improvement projects
08-09-17	Notices of Completion		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-18	Warranties		Eng		AC+4	AC+10	CCP 337.15; 10 years State of California Guidelines; 10 years after project completion for capital improvement projects
08-09-19	Operations Manuals		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements
08-09-20	As-built Plans/Record Drawings		Eng		AC+4	PERM	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements



09-00-00 STREETS & BUILDINGS

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>09-01-00</b>	<b><u>Road/Bridge Maintenance</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-01-01	General		Streets		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
09-01-02	Maintenance projects		Streets		AC+2	<b>AC+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain maintenance and repair projects for 5 years after completion of the project for reference purposes.
09-01-03	Bridge Inspection Reports		Streets		LOS+2	<b>LOS+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Life of system
09-01-04	Illegal Dumping		Streets		AC+2	<b>AC+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after correction/completion.
09-01-05	Pavement Maintenance Reports		Streets		AC+2	<b>AC+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain maintenance and repair projects for 5 years after completion of the project for reference purposes.
<b>09-02-00</b>	<b><u>Signals</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-02-01	General		Streets		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.

09-00-00 STREETS & BUILDINGS

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
09-02-02	Maintenance Projects		Streets		AC+2	<b>AC+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain maintenance and repair projects for 5 years after completion of the project for reference purposes.
09-02-03	Timing Plans/Wiring Diagrams		Streets		LOS+2	<b>LOS+2</b>	GC 34090; 2 year minimum requirement CCP 337; 3 year statute of limitations State of California Guidelines; Life of system plus 2 years
09-02-04	Maintenance Agreements	Original agreements	Streets		AE+2	<b>AE+5</b>	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
<b>09-03-00</b>	<b><u>Signs/Striping</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-03-01	General		Streets		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
09-03-02	Maintenance projects		Streets		AC+2	<b>AC+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain maintenance and repair projects for 5 years after completion of the project for reference purposes.
<b>09-04-00</b>	<b><u>Sidewalks/Walkways/Trails</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-04-01	General		Streets		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
09-04-02	Maintenance projects		Streets		AC+2	AC+5	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain maintenance and repair projects for 5 years after completion of the project for reference purposes.
<b>09-05-00</b>	<b>Lighting</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-05-01	General		Streets		CY+2	CY+10	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
09-05-02	Maintenance projects		Streets		AC+2	AC+5	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain maintenance and repair projects for 5 years after completion of the project for reference purposes.
<b>09-06-00</b>	<b>Studies</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-06-01	Master plans		Streets		S+2	PERM	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded for master plans.  Administrative Decision: Maintain master plans permanently to track history of the plan.
09-06-02	Speed surveys		Streets		AC+2	AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; Completion of survey plus 2 years
09-06-03	Vehicle counts		Streets		AC+2	AC+5	GC 34090; 2 year minimum requirement State of California Guidelines; Completion of traffic count plus 2 years.  Administrative Decision: Maintain vehicle counts for 5 years after completion for trending.

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<b>09-07-00</b>	<b>Grants</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-07-01	Applications		Streets		AFP+2	<b>AFP+5 *</b>	21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report 29 CFR 97.42; grants covered by a consolidated action plan must be kept for 5 years. State of California Guidelines; 5 years after grant closure. * State recommends referring to grant application close-out procedures, if any.
<b>09-08-00</b>	<b>Complete Streets Safety Committee</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-08-01	Administration		Streets		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
09-08-02	Agenda Items		Streets		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
09-08-03	Minutes		Streets		PERM	<b>PERM</b>	GC 34090e; Minutes of governing bodies, Permanent GC 36814; Maintain record of proceedings GC 40801; Maintain record of proceedings State of California Guidelines; Permanent
09-09-00	<b>Street Sweeping</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-09-01	Sweeping Activity				AC+2	<b>AC+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
09-09-02	Agreements				AE+2	<b>AE+5</b>	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000

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<b>09-10-00</b>	<b><u>Buildings &amp; Grounds/Rec Facilities Maint.</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-10-01	Maintenance Agreements				AE+2	<b>AE+5</b>	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
09-10-02	Warranties				AE+2	<b>AE+5</b>	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
09-10-03	Inspection reports				AC+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain inspection reports permanently for tracking purposes.
09-10-04	HAZMAT inventory/tracking/permit				CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement 40 CFR 122.21; 3 to 5 years State of California Guidelines; Current year plus 10 years for hazardous waste disposal documents.
09-10-05	Facility Assessment Report	PERM			AC+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain assessment reports permanently for historical reference.
09-10-06	Facilities Assesment Upgrades				AC+2	<b>AC+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain maintenance and repair projects for 5 years after completion of the project for reference purposes.
09-10-07	Maintenance Records				AC+2	<b>AC+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain maintenance and repair projects for 5 years after completion of the project for reference purposes.

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<b>09-11-00</b>	<b><u>Turf &amp; Landscape</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-11-01	Maintenance Agreements				AE+2	<b>AE+5</b>	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
09-11-02	Weed Abatement RFQs				AC+2	<b>AC+5</b>	GC 34090; 2 years minimum CCP 337; Statute of limitations State of California Guidelines; 5 years after audit for successful bids.  Administrative Decision: 5 years after completion of project associated with the bid.
09-11-03	IPM Policy				S+2	<b>S+5</b>	GC 34090; 2 year minimum CCP 343; 4 years to commence action Administrative Record, State of California Guidelines recommends retaining for 5 years after superseded.
09-11-04	Pesticide Usage Reports				AC+5	<b>PERM</b>	GC 34090; 2 year minimum requirement F&AC 14011.5 - 12, maintain and submit Pesticide Use Reports F&AC 14007, Restricted Materials Permits issued for 1 to 3 years.
<b>09-12-00</b>	<b><u>Sierra Point Lighting &amp; Landscape</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-12-01	Assessment District Engineers' reports				AC+2	<b>P</b>	GC 34090(a); Permanent for land and property records CCP 338; 3 year statute of limitations State of California Guidelines; Permanent
09-12-02	Assessment District Maps				S+2	<b>P</b>	GC 34090(a); Permanent for land and property records CCP 338; 3 year statute of limitations State of California Guidelines; Permanent
09-12-03	Maintenance Agreements				AE+2	<b>AE+5</b>	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000

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09-12-04	Maintenance Records				AC+2	<b>AC+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain maintenance and repair projects for 5 years after completion of the project for reference purposes.
<b>09-13-00</b>	<b><u>Street Trees</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
09-13-01	List/Map of street trees				PERM	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent for maps of city trees.
09-13-02	Approved street tree list				S+2	<b>S+2</b>	GC 34090; 2 year minimum requirement  Administrative Decision: Maintain tree lists for 2 years after superseded.
09-13-03	Maintenance Records				AC+2	<b>AC+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain maintenance and repair projects for 5 years after completion of the project for reference purposes.

10-00-00 COMMUNITY SERVICES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>10-01-00</b>	<b><u>Parks &amp; Recreation Administration</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
10-01-01	Active.net		P&R		IND	<b>IND</b>	Transitory Record: Maintain indefinitely or until data is transferred to a new tracking system.
10-01-02	Adult Classes & Programs	Includes softball, contracted classes, yoga, fitness, dance, basketball and other adult classes & programs.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year.
10-01-03	Registration Packets	Includes waivers, schedule change forms, names, address, emergency contacts and other registration related information for individuals.	P&R	C	CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year.
10-01-04	Scholarships	May include tax returns and other sensitive personal information.	P&R	C	CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
10-01-05	Co-sponsorship	Includes local & non-profit organizations that co-sponsor services with the City.	P&R	C	CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
10-01-06	Instructors	Includes contracts, W-9, Livescan and other instructor information.	P&R		AT+2	<b>AT+4</b>	CCP 337.2; Statutes of limitations of 4 years CCP 343; Statutes of limitations of 4 years  Administrative Decision: Maintain instructor files for 4 years after the instructor terminates the class.
10-01-07	Program Fliers & Brochures	Final fliers and brochures printed to PDF for retention purposes.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
10-01-08	Activity Guides / Rosters	Brochure listing events and schedules for programs.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
10-01-09	Accident / Incident Reports	Includes accidents, incidents, water rescue and other incident related reports.	P&R		AC+2	<b>AC+7</b>	GC 34090; 2 year minimum requirement 42 USC 1983; Definitions GC 25105.5; 5 years after closure/completion 29 USC 1113; 6 years after date of last action, or 3 years after plaintiff had knowledge of breach or violation, whichever comes first. GC 910 - 913; 6 months to 1 year after event occurs. State of California; 7 years after closure for accident/incident reports



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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>10-02-00</b>	<b>Special Events</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
10-02-01	Special Event Organization	Includes contact information, planning, supply acquisition, staffing, copies of contracts and other event organization information.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
10-02-02	Vendor Applications		P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
10-02-03	Health Department Inspections		P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
10-02-04	Health Department Permits		P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
10-02-05	Event Outreach		P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
10-02-06	Sponsorships	Donations to support facilitation of special events. Includes master list of sponsors, applications, correspondence and other documents related to sponsors.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
<b>10-03-00</b>	<b>Facilities</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
10-03-01	Rental Agreements	Includes applications, proof of insurance and other rental documents for picnic, clubhouses, room rentals and other facility rentals.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
10-03-02	Fire Inspection Logs		P&R		AC+2	<b>AC+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
10-03-03	Inspections / Audits	Includes County health department, fire, OSHA, SERS and other regulatory inspections.	P&R		AC+2	<b>AC+5</b>	GC 34090; 2 year minimum requirement 29 CFR 1904.33; maintain OSHA reports for 5 years from the end of the calendar year they relate to. 8 CCR 14300.33; current year plus 5 years for OSHA 300 reports 8 CCR 10102; whichever is longer of the following: 5 years from date of injury; 1 year from date compensation was last provided; upon payment of all compensation due; when audit findings are final. State of California Guidelines; 3 to 5 years after completion of inspection

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
10-03-04	Joint Use Agreements	Joint use agreement for facility usage.	P&R		AC+2	AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
10-03-05	Equipment Maintenance & Use		P&R		AC+2	AC+2	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
10-03-06	Contractor Services	Includes janitorial, maintenance, pest control, elevator servicing, pool maintenance, plumbing and other contract services.	P&R		AC+2	AC+5	CCP 337.2; Statutes of limitations CCP 343; Statutes of limitations 48 CFR 4.601; 5 years for procurements exceeding \$25,000
<b>10-04-00</b>	<b>Senior Services</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
10-04-01	Member Information Forms	Includes contact information and emergency cards for senior members.	P&R	C	CY+2	CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year.
10-04-02	Drop-in Registration	Includes registration, class information, liability waivers, emergency contact, name & address, and other information for drop-in seniors.	P&R	C	CY+2	CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year.
<b>10-05-00</b>	<b>Teen Services</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
10-05-01	Youth Advisory Committee Membership	Includes member applications	P&R		AT+5	AT+5	GC 34090; 2 years minimum GC 40801; Maintain record of proceedings State of California Guidelines; 5 years after term of office
10-05-02	Committee Agendas		P&R		CY+2	CY+2	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
10-05-03	Committee Minutes		P&R		PERM	PERM	GC 34090(e); Minutes of governing bodies, Permanent GC 36814; Maintain record of proceedings GC 40801; Maintain record of proceedings State of California Guidelines; Permanent
10-05-04	Registration Forms	Includes waivers, names, address, emergency contacts and other registration related information for individuals.	P&R	C	CY+2	CY+2	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year.

10-00-00 COMMUNITY SERVICES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
10-05-05	Monthly Calendars & Activity Schedules	Includes fliers for dances, camps, field trips and other teen activities.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
<b>10-06-00</b>	<b>Youth Programs</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
10-06-01	Youth Classes		P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year.
10-06-02	Attendance Records	Sign in sheets, emergency contact information and rosters for programs.	P&R	C	CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement 22 CCR 101229.1; maintain sign-in sheet for 1 month State of California Guidelines; Current year plus 2 years
10-06-03	Immunization Records	Separated by child.	P&R	C	AT+5	<b>AT+5</b>	5 CCR 18067; Maintain all child care accounting and reporting records for 5 years
10-06-04	Emergency Cards	Cards for participants	P&R	C	AS+2	<b>AS+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after separation
10-06-05	Emergency Action Plans	For active shooter, disaster, fire and other emergency actions.	P&R		S+2	<b>S+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded
10-06-06	Monthly Calendars & Activity Schedules		P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
<b>10-07-00</b>	<b>Park &amp; Recreation Commission</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
10-07-01	Agendas/Agenda Packets	Includes staff reports and agendas.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain for the Current Year plus 2 years
10-07-02	Minutes		P&R		PERM	<b>PERM</b>	GC 34090(e); Minutes of governing bodies, Permanent GC 36814; Maintain record of proceedings GC 40801; Maintain record of proceedings State of California Guidelines; Permanent
10-07-03	Meeting Recordings	Stored on the City website and on Youtube.	P&R		30 Days	<b>30 Days</b>	GC 54953.5; 30 days after recording

10-00-00 COMMUNITY SERVICES

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<b>10-08-00</b>	<b>Aquatics</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
10-08-01	Training Records & Certifications	Includes documentation of required employee certifications, driver training, red shirt lifeguard training, skill audits and other training for certificates and regular training.	P&R		CY+2	<b>CY+7</b>	GC 34090; 2 year minimum requirement 29 CFR 1627.3(b); 1 year for training records GC 12946; 2 years after termination GC 6250; PRA, confidential record status State of California Guidelines; Current year plus 7 years for non-safety training records. Current year plus 2 years for certificates and designations training.
10-08-02	Daily Opening / Closing Checklist	Checklists by lifeguards for pool conditions. Includes daily chemical and water testing logs.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.
10-08-03	Swim Center Staff Log	Tracks staff attendance and work schedules, daily issues and unusual activities, and other communications between lifeguards.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
10-08-04	Daily Attendance Log	Sign in sheets and rosters for programs.	P&R	C	CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
10-08-05	Aquatic Facility Rentals	For one-off events.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
10-08-06	MSDS Information		P&R		ACT	<b>CY+30</b>	29 CFR 1910.1020; Retain MSDS records for 30 years unless another record of what, where and when a chemical was used is maintained.
10-08-07	Chemical Inventory		P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for logs
10-08-08	Video Surveillance	Automatic system maintains videos for 30 days.	P&R		30 Days	<b>30 Days</b>	GC 54953.5; 30 days after recording
10-08-09	County Health Inspections	Pool inspections	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years
10-08-10	Cash Deposit Receipts	Originals go to Finance.	P&R		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines

11-00-00 SEWERS

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<b>11-01-00</b>	<b><u>General Administration</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
11-01-01	General Information		Sewers		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
11-01-02	SSMP/Audits		Sewers		S+2	<b>S+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after master plan is superseded.
11-01-03	Sanitary Sewer Overflow Reports		Sewers		CY+2	<b>CY+10</b>	40 CFR 141.91; 10 years after completion. State of California Guidelines; Current year plus 10 for sanitary surveys.
11-01-04	County FOG Inspections		Sewers		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain inspections for the current year plus 10 years for reference purposes.
11-01-05	Joint Sewer Agreements	Includes project files and copies of agreements associated with joint sewer projects.	Sewers		AC+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain project permanently for tracking purposes.
11-01-06	Sanitary Sewer Maintenance Agreements	Includes project files and copies of agreements associated with sanitary sewer projects.	Sewers		AC+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain project permanently for tracking purposes.
11-01-07	Easement Records		Sewers		AC+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain project permanently for tracking purposes.
<b>11-02-00</b>	<b><u>Engineering</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.

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11-02-01	General Information		Sewers		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
11-02-02	Sanitary Sewer Master Plan		Sewers		S+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded for master plans.  Administrative Decision: Maintain master plans permanently to track history of the plan.
11-02-03	Development Engineering and Reports		Sewers		AC+4	<b>PERM</b>	H&S 19850; Building plans - Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
<b>11-03-00</b>	<b>Facilities Maintenance</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
11-03-01	General Information		Streets		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
11-03-02	Lift Station Emergency Response Plans				S+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded for master plans.  Administrative Decision: Maintain master plans permanently to track history of the plan.
11-03-03	Generator BAAQMD Permits & Testing				CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for permits other than NPDES.  Administrative Decision: Maintain permits and testing for the current year plus 10 years for reference purposes.
11-03-04	Sewer Video Surveyance Program				CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain inspections for the current year plus 10 years for reference purposes.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
11-03-05	Condition Assessment Records				CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain inspections for the current year plus 10 years for reference purposes.
11-03-06	Facilities Inspection Records				CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain inspections for the current year plus 10 years for reference purposes.
11-03-07	Equipment Records/O&M/Specs/Warranties				LOV+2	<b>LOV+4</b>	GC 34090; 2 year minimum requirement CCP 343; 4 years for action State of California Guidelines state life of the equipment plus 2 years for fuel, maintenance and repair records.
<b>11-04-00</b>	<b><u>Discharge Operations</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
11-04-01	General Information		Streets		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
11-04-02	SFPUC Discharge Agreement	Original agreement.			PERM	<b>PERM</b>	State of California Guidelines; Permanent for joint powers authorities agreements.
11-04-03	Discharge Rate/Financial Report				CY+2	<b>CY+5</b>	40 CFR 122.41; 3 years after completion for other discharge record. State of California Guidelines; Current year plus 5

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<b>12-01-00</b>	<b><u>General Administration</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
12-01-01	General Information		Storm Drain		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
12-01-02	Easement Records	City Clerk maintains the original.	Clerk		PERM	<b>PERM</b>	GC 34090(a); Permanent for land and property related documents 24 CFR 1710; Permanent
12-01-03	Private Development		Storm Drain		AC+4	<b>PERM</b>	H&S 19850; Building plans - Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
<b>12-02-00</b>	<b><u>Engineering</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
12-02-01	General Information		Storm Drain		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
12-02-02	Storm Drain Master Plan		Storm Drain		S+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded for master plans.  Administrative Decision: Maintain master plans permanently to track history of the plan.
12-02-03	Design Criteria and Development		Storm Drain		AC+4	<b>PERM</b>	H&S 19850; Building plans - Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
12-02-04	Public Infrastructure Improvements		Storm Drain		AC+4	<b>PERM</b>	GC 4003, 4004, Maintain CCP 337.15; 10 years State of California Guidelines; Permanent for capital improvements



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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
12-02-05	Permits/Regulatory Compliance		Storm Drain		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for permits other than NPDES.  Administrative Decision: Maintain permits for the current year plus 10 years for historical reference.
<b>12-03-00</b>	<b>Facilities Maint.</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
12-03-01	General Information		Storm Drain		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
12-03-02	Equipment Records/O&M/Specs/Warranties		Storm Drain		LOV+2	<b>LOV+4</b>	GC 34090; 2 year minimum requirement CCP 343; 4 years for action State of California Guidelines state life of the equipment plus 2 years for fuel, maintenance and repair records.
12-03-03	Facilities Inspection Report		Storm Drain		AC+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance projects.  Administrative Decision: Maintain inspection reports permanently for tracking purposes.
12-03-04	Adopt a Drain Program		Storm Drain		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years  Administrative Decision: Maintain program files for the current year plus 10 years for tracking and history reference purposes.
<b>12-04-00</b>	<b>NPDES</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
12-04-01	Annual Reports		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports

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12-04-02	Permits		Storm Drain		PERM	<b>PERM</b>	40 CFR 122.28; Maintain NPDES general permits State of California Guidelines; Permanent for NPDES permits
12-04-03	C.2 Municipal Operations		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
12-04-04	C.3 New Development and Redevelopment		Storm Drain		AC+5	<b>PERM</b>	GC 34090a; Real property records, maintain Permanently GC 4003, 4004; Maintain H&S 19850; Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent  Administrative Decision: Maintain development projects permanently to coincide with CEQA guidelines and environmental recommendations.
12-04-05	C.4 Industrial and Commercial Site Controls		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
12-04-06	C.5 Illicit Discharge Detection and Elimination		Storm Drain		AC+2	<b>AC+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports  Administrative Decision: Maintain incidents for 5 years after correction or resolve.
12-04-07	C.6 Construction Site Control		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
12-04-08	C.7 Public Information and Outreach		Storm Drain		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement CCP 335.1; 2 years for action on injuries caused by neglect. State of California Guidelines; 2 years plus the current year for event records.
12-04-09	C.8 Water Quality Monitoring		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
12-04-10	C.9 Pesticides Toxicity Controls		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
12-04-11	C.10 Trash Load Reduction		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
12-04-12	C.11 Mercury Controls		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
12-04-13	C.12 PCBs Controls		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
12-04-14	C.13 Copper Controls		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
12-04-15	C.14 Bacteria Controls		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
12-04-16	C.15 Exempted and Conditional Exempted Discharges		Storm Drain		CY+2	<b>CY+5</b>	40 CFR 122.21; 3 years after approval 40 CFR 122.41; 3 years after report State of California Guidelines; Current year plus 5 years for discharge monitoring reports
<b>12-05-00</b>	<b>Assessment Districts</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
12-05-01	Assessment Engineer's Reports		Storm Drain		AC+2	<b>P</b>	GC 34090(a); Permanent for land and property records CCP 338; 3 year statute of limitations State of California Guidelines; Permanent

13-00-00 WATER OPERATIONS

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>13-01-00</b>	<b>General Administration</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
13-01-01	General Information		Water		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
13-01-02	Water Supply Contract		Water		AE+2	<b>AE+5</b>	CCP 337.2; Statutes of limitations, leases 4 years CCP 343; Statutes of limitations, general 4 years 48 CFR 4.601; 5 years for procurements exceeding \$25,000
13-01-03	Wholesale Water Shortage Allocation Plan		Water		S+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded for master plans.  Administrative Decision: Maintain master and strategic plans permanently to track history of the plan.
13-01-04	SWRCB-DDW Regulatory Permits/Reporting		Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for compliance documents.
13-01-05	San Mateo DEH Cross Connection Control	Records include the annual testing/certification records for the City's public backflow prevention devices. (Note: San Mateo County currently maintains the testing/certification records for all private and public backflow prevention devices ).	Water		CY+5	<b>CY+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current Year plus 2 years for maintenance projects. 40 CFR 141.33; 3 years after last action taken for drinking water violation corrections.  Administrative Decision: Maintain backflow monitoring and testing records for the current year plus 5 years to support compliance documents.
13-01-06	SFPUC Wholesale Water Reporting/Studies		Water		AC+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain water reports and studies for 2 years after completion.  Administrative Decision: Maintain reports and studies permanently for reference and trending.
13-01-07	Water System Emergency SOPs		Water		S	<b>S+5</b>	GC 34090; 2 year minimum requirement CCP 343; 4 years to commence action Administrative Record, State of California Guidelines recommends retaining for 5 years after superseded.
13-01-08	Wholesaler Rate/Financial Report		Water		S+2	<b>S+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain water rates for 2 years after superseded.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
13-01-09	BAWSCA Reports/Studies/Correspondence		Water		AC+2	PERM	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain water reports and studies for 2 years after completion.  Administrative Decision: Maintain reports and studies permanently for reference and trending.
<b>13-02-00</b>	<b>Engineering</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
13-02-01	General Information		Water		CY+2	CY+10	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
13-02-02	Water System Master Plan		Water		S+2	PERM	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded for master plans.  Administrative Decision: Maintain master and strategic plans permanently to track history of the plan.
13-02-03	Water System Vulnerability Studies		Water		AC+2	PERM	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain water reports and studies for 2 years after completion.  Administrative Decision: Maintain reports and studies permanently for reference and trending.
13-02-04	Water Supply and Demand Projections		Water		CY+2	CY+12	40 CFR 141.33; 10 years after completion 40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for compliance documents.
13-02-05	Development Engineering and Reports		Water		AC+4	PERM	H&S 19850; Building plans - Life of Building, with exceptions CC 1351; definitions, community property State of California Guidelines; Permanent
13-02-06	Fire Flow Reports		Water		AC+2	PERM	GC 34090; 2 year minimum requirement State of California Guidelines; Maintain water reports and studies for 2 years after completion.  Administrative Decision: Maintain reports and studies permanently for reference and trending.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
13-02-07	SWRCB Potable Water Discharge Permit		Water		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for permits other than NPDES.  Administrative Decision: Maintain permits for the current year plus 10 years for historical reference.
<b>13-03-00</b>	<b><u>Facilities Maintenance</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
13-03-01	General Information		Water		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
13-03-02	Equipment Records/O&M/Specs/Warranties		Water		LOV+2	<b>LOV+4</b>	GC 34090; 2 year minimum requirement CCP 343; 4 years for action State of California Guidelines state life of the equipment plus 2 years for fuel, maintenance and repair records.
13-03-03	Facility Inspection Reports		Water		CY+2	<b>CY+5</b>	40 CFR 122.41; 5 years 40 CFR 503.17; 5 years
13-03-04	Water Storage Tank Monitoring Reports		Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for State certification compliance reports
13-03-05	Generator BAAQMD Permits & Testing		Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for State certification compliance reports
13-03-06	SCADA		Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for compliance documents.  Administrative Decision: Maintain SCADA reports for the current year plus 12 years to support water quality.
13-03-07	AMI	Includes real time water use data downloaded and stored from all residential and commercial water meter accounts in the City	Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for State certification compliance reports
13-03-08	Development O&M/Monitoring Reports/Manuals		Water		LOS+2	<b>LOS+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after termination for several kinds of equipment manuals.  RSA Suggestion; Life of the equipment plus 2 years for equipment manuals & specifications.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>13-04-00</b>	<b><u>Water Quality</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
13-04-01	General Information		Water		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
13-04-02	Monthly SWRCB-DDW Regulatory Compliance Reporting		Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for State certification compliance reports
13-04-03	Quarterly DBP Regulatory Compliance Reporting		Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for State certification compliance reports
13-04-04	Triannual Lead and Copper Regulatory Compliance Reporting		Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for compliance documents.
13-04-05	Annual Water Quality Reporting/CCR		Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for compliance documents.
13-04-06	Asbestos/Other Monitoring Reporting		Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for compliance documents.
13-04-07	SFPUC/BAWSCA Water Quality Committee	Includes general information and correspondence on a more regional level.	Water		CY+2	<b>CY+2</b>	GC 34090d; 2 year minimum requirement Administrative Record, State of California Guidelines
<b>13-05-00</b>	<b><u>Conservation</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
13-05-01	General Information		Water		CY+2	<b>CY+10</b>	GC 34090; 2 year minimum requirement Administrative Record, State of California Guidelines  Administrative Decision: Maintain general information for the current year plus 10 years to support project files.
13-05-02	Water Shortage Contingency Plan		Water		S+2	<b>PERM</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after superseded for master plans.  Administrative Decision: Maintain master and strategic plans permanently to track history of the plan.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
13-05-03	Drought Regulations/Messaging	Compliance to State and regional emergency / mandated orders for drought response.	Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for compliance documents.
13-05-04	Conservation Based Rebate Programs	City programs to assist residential/commercial customers to reduce water use to meet current State water use restrictions.	Water		CY+2	<b>CY+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for conservation records.  Administrative Decision: Maintain conservation records for the current year plus 5 years to track history of the events.
13-05-05	BAWSCA Water Resources Committee	Includes general information and correspondence on a more regional level.	Water		CY+2	<b>CY+2</b>	GC 34090d; 2 year minimum requirement Administrative Record, State of California Guidelines
13-05-06	SWRCB Conservation Regulatory Reports		Water		CY+2	<b>CY+12</b>	40 CFR 141.91; 12 years after completion State of California Guidelines; Current year plus 12 for compliance documents.
13-05-07	Conservation Events		Water		CY+2	<b>CY+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for conservation records.  Administrative Decision: Maintain conservation records for the current year plus 5 years to track history of the events.



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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>05-01-00</b>	<b>General Finance Group</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	Finance		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
05-01-01	Cash Receipts		Finance		AA+1	<b>AA+4</b>	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
05-01-02	General Ledger (Journal Entries, Balance Sheets & Income Statements)		Finance		CY+1	<b>PERM</b>	GC 34090; 2 years minimum CCP 337; Statute of Limitations State of California Recommendations; Permanent
05-01-03	Development Funding	Developer fees and backup information.	Finance		ACT+1	<b>ACT+4</b>	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit  Administrative Decision: Maintain funding for 4 years after the money is used.
05-01-04	Banking & Reconciliation	Includes statements, summaries for receipts, disbursements & reconciliation	Finance		CY+1	<b>AA+5</b>	GC 34090; 2 years minimum 26 CFR 31.6001-1(e)(2); 4 years State of California Guidelines; 5 years after audit
05-01-05	Business Licenses	Payment information and reports	Finance		CY+1	<b>ACT+4</b>	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations State of California Guidelines; 4 years after termination
05-01-06	Successor Agency	Includes ROPS , general ledger and other financials related to the Successor Agency.	Finance		CY+1	<b>PERM</b>	GC 34090; 2 years minimum GC 53901; Budgets copy must be filed with the County State of California Guidelines; Permanent  Permanent refers to one final copy of the approved budget.
05-01-07	Voided / Cancelled Checks	Includes payroll, cancelled & voided checks. Cancelled checks maintained electronically and accessible via bank website.	Finance		AA+2	<b>AA+5</b>	GC 34090; 2 years minimum 26 CFR 31.6001-1(e)(2); 4 years State of California Guidelines; 5 years after audit
05-01-08	Annual Reports - CAFR Originals	Includes original copy of CAFR.	Finance		AA+10	<b>PERM</b>	GC 34090; 2 years minimum State of California Guidelines; 7 years after audit  Administrative Decision: Maintain annual financial statements permanently.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
05-01-09	Grants		Finance		AFP+2 *	<b>AFP+5 *</b>	21 CFR 1403.36(i)(11); 3 years after last payment 21 CFR 1403.42; 3 years after last payment, unless litigation, then 3 years after claim is filed/settled. 24 CFR 570.502(b)(3); Deeds/CDBG activities, 4 years after closure of loan 24 CFR 85.42; Grants & co-operative agreements, 3 years after submission of last expenditure report 29 CFR 97.42; grants must be kept for 3 years after final expenditure report. State of California Guidelines; 5 years after grant closure. * State recommends referring to grant application close-out procedures, if any.
05-01-10	Fixed Assets	Inventories reflecting purchase date, cost and account number. Purchase information, maintenance, inventory and disposal.	Finance		AA+2	<b>AA+4</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 4 years after audit for fixed asset inventories, no specific retention for depreciation schedules.
05-01-11	Single Audits	Annual financial audit. Does not include workpapers.	Finance		AA+2	<b>PERM</b>	GC 34090; 2 years minimum State of California Guidelines; Permanent
05-01-12	State Mandated Reports	Includes Quarterly Reports, State Controller's Annual Reports, SLESF & MOE.	Finance		CY+2	<b>PERM</b>	GC 34090; 2 years minimum State of California Guidelines; Permanent
05-01-13	Audit Workpapers				AA+2	<b>AA+7</b>	GC 34090; 2 years minimum State of California Guidelines; 7 years after audit
<b>05-02-00</b>	<b><u>Accounts Payable Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	Finance		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
05-02-01	Invoices Paid	Invoices and supporting vendor documents.	Finance		CY+1	<b>AA+4</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 4 years after audit
05-02-02	Audit Trail - Registers/Month End Reports	Management report.	Finance		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
05-02-03	Series Available for Use						
05-02-04	1099 & W-9	Independant Contractor's 1099 & W9 Forms	Finance		AA+4	<b>AA+4</b>	GC 34090; 2 year minimum requirement 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed 29 CFR 516.5; Maintain at least 3 years State of California Guidelines; 4 years after audit
05-02-05	Series Available for Use						
05-02-06	Warrant Registers		Finance		AA+2	<b>AA+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after audit
<b>05-03-00</b>	<b><u>05-03-00 Payroll Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	Finance		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
05-03-01	Payroll Registers		Finance	C	CY+2	PERM	GC 34090; 2 years minimum GC 12946; 2 years after termination 29 CFR 516.2-6; 4 years after tax return filing 29 CFR 1627; 3 years State of California Guidelines; Permanent
05-03-02	Payroll Tax Documents	Forms 1096, 1099 and W-2.	Finance	C	CY+2	AA+6	GC 34090; 2 year minimum requirement 29 USC 436; 5 years 26 CFR 31.6001; 4 years after tax return is filed R&T 19530; 3 years after tax return is filed R&T 19704; 6 year statute of limitations 29 CFR 516.2-6; Maintain at least 3 years State of California Guidelines; 4 years after audit
05-03-03	Payroll Vendor Payments	Invoices and supporting vendor documents.	Finance		CY+2	AA+4	GC 34090; 2 year minimum requirement State of California Guidelines; 4 years after audit
05-03-04	Series Available for Use						
05-03-05	Employee Time Sheets / Vacation Requests	Payroll pay sheets, vacation requests, FLSA worksheets; hourly and salary employees. Current system is hosted electronically.	Finance		CY+2	AA+6	GC 34090; 2 year minimum requirement 29 CFR 516.2; Maintain 29 CFR 516.6; 2 years R&T 19530; 3 years after tax return due R&T 19704; 6 year statute of limitations LC 1174; 2 years after pay period 26 CFR 31.6001-1; 4 years after tax return due 29 USC 255(a); 2 to 3 years statute of limitations for minimum wages State of California Guidelines; 6 years after audit
<b><u>05-04-00</u></b>	<b><u>Bonds Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	Finance		REV	REV	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
05-04-01	Official Statements (OS)	Includes the bond issue and binders	Finance		AC+2	PERM	GC 43900-43903; Destruction guidelines for bonds FC 30210; Maintain State of California Guidelines; Permanent for bond issues
05-04-02	Fiscal Agent Statements	Includes original project, if refinanced. Maintain all documentation until the bond it paid back in full, plus 10 years.	Finance		CY+2	AC+10	GC 34090; 2 year minimum requirement GC 43900-43903; Destruction guidelines for bonds CCP 337.5; Statutes of limitations, 10 years after expiration FC 30210; Maintain State of California Guidelines; 10 years after closure/expiration

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>05-05-00</b>	<b><u>Budget Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	Finance		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
05-05-01	Master Copies of the Budget	Permanent refers to one final copy of the approved budget. Working copies can be destroyed after use.	Finance		CY+5	<b>PERM</b>	GC 34090; 2 years minimum GC 40802; Maintain GC 53901; Budgets copy must be filed with the County State of California Guidelines; Permanent
05-05-02	Budget Input/Changes		Finance		CY+1	<b>AA+2</b>	GC 34090; 2 years minimum State of California Guidelines; 2 years after audit
05-05-03	Budget Workpapers - Finance / Departmental	Includes proposed budgets, and all work papers leading up to final annual budget. TRANSITORY RECORD.	Finance		ACT	<b>ACT</b>	Transitory Record; Maintain as long as necessary for current business activities. GC 34090.7; Duplicate information may be destroyed within the 2 year minimum retention requirement.
<b>05-06-00</b>	<b><u>Water and Sewer Department Group</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	Finance		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
05-06-01	Payment Stubs		Finance		CY+1	<b>AA+4</b>	GC 34090; 2 years minimum State of California Guidelines; 4 years after audit
05-06-02	Audit Trails & Month End Reports	Management report.	Finance		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
05-06-03	Utility Usage Reports		Finance		AA+2	<b>AA+5</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years after audit  Administrative Decision: 5 years after audit for trending and rate setting.
05-06-04	Work Orders		Finance		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; 2 years plus the current year for maintenance and operations.
05-06-05	Collection Activities	Includes aging reports for collections of fire billings, retiree medical, business loans and other collections.	Finance		AC+2	<b>AC+4</b>	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations of 4 years State of California Guidelines; 4 years after audit  Administrative Decision: Maintain for 4 years after closure or collection.

**05-00-00 FINANCIAL SERVICES RECORDS**

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
<b>05-07-00</b>	<b><u>Assessment Districts</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	Finance		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
05-07-01	Northeast Ridge Assessment District		Finance		CY+2	<b>PERM</b>	GC 34090(a); Permanent for land and property records CCP 338; 3 year statute of limitations State of California Guidelines; Permanent
<b>05-08-00</b>	<b><u>Group Available for Use</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	Finance		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
<b>05-08-00</b>	<b><u>Revenue &amp; Collections Records</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	Finance		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
05-08-01	Year 2000 Preparation	Formerly Utility Tax. All information relates to Year 2000 preparation.	Finance		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
05-08-02	Transient Occupancy Tax	Includes invoices, payments and remittance forms.	Finance		AA+1	<b>AA+3</b>	GC 34090; 2 year minimum requirement CCP 338; Statute of limitations, 3 years for action State of California Guidelines; 3 years after audit
05-08-03	Sales Tax Remittance		Finance		AA+1	<b>AA+3</b>	GC 34090; 2 year minimum requirement CCP 338; Statute of limitations, 3 years for action State of California Guidelines; 3 years after audit
05-08-04	Cannabis Tax	Includes invoices, payments and remittance forms.	Finance		AA+1	<b>AA+3</b>	GC 34090; 2 year minimum requirement CCP 338; Statute of limitations, 3 years for action State of California Guidelines; 3 years after audit
05-08-05	Franchise Fees	Includes payments and remittance forms.	Finance		AA+1	<b>AA+4</b>	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations, 4 years for action State of California Guidelines; 4 years after audit
05-08-09	Tax Reports	Includes reports from an outside service for sales and property taxes.	Finance	C	CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
05-08-10	Community Facilities District Reports	Includes reports for utility users, sales and property taxes, and business license revenue, provided by an outside service for credits to Mare Island for revenues received.	Finance		AA+1	<b>P</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Permanent for assessment district information in Finance.

**05-00-00 FINANCIAL SERVICES RECORDS**

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Retention	Total Retention	Citations & Legal Basis ©
05-08-11	Collection Activities		Finance		AC+1	<b>AC+4</b>	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations of 4 years State of California Guidelines; 4 years after audit  Administrative Decision: Maintain for 4 years after closure or collection.
<b>05-09-00</b>	<b>Investment Group</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	Finance		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
05-09-01	Custody Account Statements	Summary of transactions, inventory & earnings report.	Finance		CY+2	<b>CY+5</b>	GC34090; 2 year minimum CCP 337; Statutes of limitations GC 53607; Authorization for Treasurer to invest State of California Guidelines; Permanent  Administrative Decision: Maintain custody account statements for the current year plus 5 years.
<b>05-10-00</b>	<b>05-10-00 Purchasing/Contracting Group</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	Finance		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
05-10-01	Purchase Orders	Original purchase orders and quotes maintained by the departments. Finance keeps a copy of the signed purchase order.	Finance		CY+2	<b>AA+4</b>	GC 34090; 2 year minimum requirement CCP 337; Statute of limitations State of California Guidelines; 4 years after audit
05-10-02	Series Available for Use						
05-10-03	RFI / RFP / RFQ		All Depts		AC+5	<b>AC+5</b>	GC 34090; 2 years minimum CCP 337; Statute of limitations State of California Guidelines; 5 years after audit for successful bids.  Administrative Decision: 5 years after completion of project associated with the bid.
05-10-04	Bids - Successful		All Depts		AC+5	<b>AC+5</b>	GC 34090; 2 years minimum CCP 337; Statute of limitations State of California Guidelines; 5 years after audit for successful bids.  Administrative Decision: 5 years after completion of project associated with the bid.
05-10-05	Bids - Unsuccessful		All Depts		CY+2	<b>CY+2</b>	GC 34090; 2 years minimum State of California Guidelines; Current year plus 2 for unsuccessful bids

Record Retention Schedules UFIRST™ Index

06-00-00 INFORMATION TECHNOLOGIES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Suggested Retention	Total Required Retention	Citations & Legal Basis ©
<b>06-01-00</b>	<b>General Information Technologies Records</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
06-01-01	Active Directory Database	Manages LAN, network objects, network user accounts and internet access.	IT		IND	<b>IND</b>	Transitory Record; Databases are maintained while active
06-01-02	Technical Network Diagrams	Documents related to network configuration.	IT	C	IND	<b>IND</b>	Transitory Record; Databases are maintained while active
06-01-03	Network Asset Tracking	Managed and maintained by Endsight service provider.	IT	C	IND	<b>IND</b>	Transitory Record; Databases are maintained while active
<b>06-02-00</b>	<b>Projects &amp; Licensing Records</b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
06-02-01	IT Projects	Includes all project related documents. Mostly contained in e-mails and attachments.	IT		AC+2	<b>AC+2</b>	GC 34090; 2 year minimum requirement State of California Guidelines; Current year plus 2 years for maintenance and operations
06-02-02	End User License Agreements		IT		AT	<b>AT+5</b>	CCP 337.2; Statutes of limitations of 4 years CCP 343; Statutes of limitations of 4 years 48 CFR 4.601; 5 years after completion for procurements exceeding \$25,000
06-02-03	Annual Maintenance Information	Includes documents related to annual maintenance contracts for software and hardware.	IT		AT	<b>AT+5</b>	CCP 337.2; Statutes of limitations of 4 years CCP 343; Statutes of limitations of 4 years 48 CFR 4.601; 5 years after completion for procurements exceeding \$25,000

06-00-00 INFORMATION TECHNOLOGIES

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Series Code	Series Name	Description of Documents, As Needed	Office of Record	Special Attributes	Active Suggested Retention	Total Required Retention	Citations & Legal Basis ©
<b>06-03-00</b>	<b><u>Backup and Recovery Plans</u></b>	Includes general subject information, reports and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
06-03-01	City Server & E-mail Backups	Hosted by Endsight.  Daily Backups:  Weekly Backups:  Monthly Backups:	IT		7 Days  CW+4  CM+11	<b>7 Days</b>  <b>CW+4</b>  <b>CM+11</b>	GC 34090.7; Duplicate records may be destroyed within the 2 year minimum requirement period State of California Guidelines; Current year plus 2 years for annual backups, current month plus 1 year for monthly backups, current week plus 6 months for weekly backups, current day plus 2 months.  Administrative Decision: Due to inconsistencies in destruction of electronic documents versus backed up documents, maintain backups according to the department's current business practice. No backup is retained for longer than 1 year.
06-03-02	Backup Configurations	Includes router and switch configurations.	IT	C	SUP	<b>SUP+2</b>	GC 34090; 2 year minimum requirement
<b>06-04-00</b>	<b><u>Website &amp; Social Media</u></b>	Includes general subject information, reports, instructional and reference documents relating to the record group, but not associated with a specific record series already in the group.	All Depts		REV	<b>REV</b>	Consider these documents "Reference Records", which may be destroyed within the 2 year State minimum (GC 34090). Review any documents assigned to these record codes annually for relevance to a new or existing record series and/or project, or for destruction.
06-04-01	Social Media Archiving	Allows snapshots of changes to the website and for social media. Facebook, Instagram, Twitter, Nextdoor and other social media platform posts.	Comm		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
06-04-02	Brisbane Social Media User Group	Internal group comprised of staff City-wide. Includes meeting agendas and notes.	Comm		CY+2	<b>CY+2</b>	GC 34090; 2 year minimum requirement
06-04-03	Email Marketing	Allows distribution and archiving of e-mail blasts from the City. Maintains e-mail address lists and e-mail blasts through the Chamber of Commerce. E-mail blast content is also maintained on the City's e-mail server.	Comm		IND	<b>IND</b>	Transitory Record; Databases are maintained while active
06-04-04	Website Related Projects	Includes reports of broken links, misspellings, accessibility, analytics, and other website improvement assistance.	Comm		IND	<b>IND</b>	Transitory Record; Databases are maintained while active