

RESOLUTION NO. 13-094

A RESOLUTION OF THE CUPERTINO CITY COUNCIL RESCINDING RESOLUTION NO 12-039 AND ADOPTING A RECORDS RETENTION SCHEDULE FOR THE CITY OF CUPERTINO

WHEREAS, Section 34090 of the Government Code of the State of California provides a procedure whereby any City record which has served its purpose and is no longer required may be destroyed; and

WHEREAS, the State of California has adopted guidelines for retention period for various government records; and

WHEREAS, on March 4, 2002, the Cupertino City Council adopted Resolution No. 02-037 adopting the Local Government Retention Guidelines Administered by the California State Archives Division of the Secretary of State's office as the records retention schedule for the City of Cupertino; and

WHEREAS, on May 1, 2012, the Cupertino City Council rescinded Resolution No. 02-037 and adopted Resolution No. 12-039 amending the records retention schedule to add specific record types and extend timelines on certain record types; and

WHEREAS, the City of Cupertino recognizes the importance of providing clear, specific record descriptions and retention periods, and applying current law and technology to a records retention program; and

WHEREAS, the term "records" as used herein shall include documents, instructions, books, microforms, electronic files, magnetic tape, optical media, or papers; as defined by the California Public Records Act; and

NOW, THEREFORE, BE IT RESOLVED that the City Council of the City of Cupertino hereby takes the following action:

1. Rescinds Resolution No. 12-039
2. Adopts the Records Retention Schedule, as set forth in Exhibit A, attached hereto and incorporated herein by this reference

PASSED AND ADOPTED at a regular meeting of the City Council of the City of Cupertino this 19th day of November, 2013 by the following vote:

<u>Vote</u>	<u>Members of the City Council</u>
AYES:	Mahoney, Wong, Chang, Santoro, Sinks
NOES:	None
ABSENT:	None
ABSTAIN:	None

ATTEST:

APPROVED:

/s/ Grace Schmidt

/s/ Orrin Mahoney

Grace Schmidt, City Clerk

Orrin Mahoney, Mayor, City of Cupertino

INDEX – RECORDS RETENTION SCHEDULES

Abbreviations:

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CA – City Attorney

CC – City Clerk

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CM – City Manager

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RECORDS RETENTION SCHEDULE: CITY-WIDE STANDARDS

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
<i>Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Lead Dept.	CW-001	Affidavits of Publications / Affidavits of Posting Notices / Legal Advertising / Notices / Proofs of Publications/ Public Hearing Notices	2 years		2 years	CCP §§337 et seq, 349.4; GC §§34090, 54960.1(c)(1)
Lead Dept.	CW-002	Agreements & Contracts: ADMINISTRATIVE FILES (Correspondence, Project Administration, Project Schedules, Certified Payrolls, Insurance Certificates, Invoices, Logs, etc.)	Completion	10 years or After Funding Agency Audit, if required, whichever is longer	Completion + 10 years or After Funding Agency Audit, if required, whichever is longer	GC §34090
Lead Dept.	CW-003	Agreements & Contracts: UNSUCCESSFUL BIDS, UNSUCCESSFUL PROPOSALS or RESPONSES to RFPs (Request for Proposals) and/or RFQs (Request for Qualifications) that don't result in a contract	2 years			The RFP / RFQ and the successful proposal becomes part of the agreement or contract (City Clerk is OFR for successful bids / proposals); GC §34090
Lead Dept.	CW-004	Boards and Committees: AUDIO RECORDINGS of Meetings / Audio Tapes	30 days, or After Minutes are Adopted, Whichever is Longer		30 days, or After Minutes are Adopted, Whichever is Longer	GC §54953.5(b)
Lead Dept.	CW-005	Boards, Commissions, & Committees: City Council Subcommittees (Agendas and Minutes for Subcommittees Composed solely of less than a quorum of the City Council)	2 years		2 years	All recommendations are presented to the City Council; GC §34090 et seq.

RECORDS RETENTION SCHEDULE: CITY-WIDE STANDARDS

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
<i>Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Lead Dept.	CW-006	Boards, Commissions, & Committees: Residents Advisory Bodies Formed by CITY COUNCIL AGENDAS, AGENDA PACKETS	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	Brown Act challenges must be filed within 30 or 90 days of action; GC §§34090, 54960.1(c)(1)
Finance / Revenue	CW-007	Cash Receipts Detail / Backup / Accounts Receivable Detail / Refund Detail	1 year		1 year	Originals are sent to Finance, who is the Office of Record; these are copies retained for auditing purposes; GC §34090.7
Lead (Responding) Dept.	CW-008	Complaints / Concerns from Citizens Computer Tracking Software or Correspondence	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	City preference; Statute of Limitations for personal property, fraud, etc. is 3 years; Claims must be filed in 6 months; CCP §§338 et seq., 340 et seq., 342, GC §§945.6, GC §34090
Dept. that Authors Document or Receives the City's Original Document	CW-009	Correspondence - ROUTINE (e.g. Administrative, Chronological, General Files, Letters, Memorandums, Reading File, Working Files, etc.)	2 years		2 years	GC §34090

RECORDS RETENTION SCHEDULE: CITY-WIDE STANDARDS

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
<i>Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Dept. that Authors Document or Receives the City's Original Document	CW-010	Correspondence - TRANSITORY / PRELIMINARY DRAFTS , Interagency and Intraagency Memoranda not retained in the ordinary course of business (e.g. calendars, checklists, e-mail or social media posting that is NOT made or retained for the purpose of preserving the informational content for future reference, instant messaging, inventories, invitations, logs, mailing lists, meeting room registrations, speaker slips, supply inventories, telephone messages, transmittal letters, thank yous, requests from other cities, undeliverable envelopes, visitors logs, voice mails, webpages, etc.)	When No Longer Required		When No Longer Required	Electronic and paper records are categorized, filed and retained based upon the appropriate records series (based on the content of the record.) E-mails, electronic records, or social media postings that ARE made or retained for the purpose of preserving the informational content for future reference are saved by printing them out and placing them in a file folder, or saving them electronically. If not mentioned here, consult the City Attorney to determine if a record is considered transitory / preliminary draft. GC §§34090, 6252, 6254(a)
Information Technology	CW-011	Documents Generated by GIS	Indefinite		Indefinite	Documents generated in City's GIS system by a lead dept. should be placed in appropriate project files or saved as necessary for historical purposes. Contact IT and refer to dept. policy regarding retention of historical GIS information. GC §34090 et seq.
Lead Dept.	CW-012	Drafts & Notes: Drafts that are revised (retain final version)	When No Longer Required		When No Longer Required	As long as the drafts and notes are not retained in the "Regular Course of Business." Consult the City Attorney to determine if a records is considered a draft. GC §§34090, 6252, 6254(a)
Lead Dept.	CW-013	Facility Use Applications / Facility Use Permits	2 years		2 years	GC §34090
Lead Dept. & City Manager	CW-014	Grants / CDBG (UNSUCCESSFUL Applications, Correspondence)	2 years		2 years	GC §34090

RECORDS RETENTION SCHEDULE: CITY-WIDE STANDARDS

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
<i>Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Lead Dept. & City Manager	CW-015	Grants / CDBG / Reimbursable Claims (SUCCESSFUL) Reports, other records required to pass the funding agency's audit, if required) Applications (successful), grant agreement, program rules, regulations & procedures, reports to grant funding agencies, correspondence, audit records, completion records	2 years	After Funding Agency Audit, if Required - Minimum 5 years	After Funding Agency Audit, if required - Minimum 5 years	GC §34090
Lead Dept.	CW-016	Leave Requests / Vacation Requests	When No Longer Required		When No Longer Required	City Preference; Preliminary draft / transitory record; GC §34090, GC §6252
Lead Dept.	CW-017	Material Data Safety Sheet (MSDS) / Chemical Use Report Form (or records of the chemical / substance / agent, where & when it was used)	While Chemical In Use	30 years	30 years	GC §34090
Lead Dept.	CW-018	Newspaper Clippings	When No Longer Required		When No Longer Required	Non-records - may be obtained from the newspaper company; GC §34090
Lead Dept.	CW-019	Personnel Work Schedules	2 years		2 years	GC §34090
Lead Dept.	CW-020	Public Relations / Press Releases	2 years		2 years	GC §34090
Lead Dept. (Who Ordered the Appraisal)	CW-021	Real Estate Appraisal Reports: Property NOT purchased, Loans not funded, etc.	2 years		2 years	GC §§34090, 6254(h)
Lead Dept. (Who Ordered the Appraisal)	CW-022	Real Estate Appraisal Reports: Purchased Property, Funded Loans	2 years	When No Longer Required - Minimum 3 years	When No Longer Required - Minimum 5 years	GC §34090

RECORDS RETENTION SCHEDULE: CITY-WIDE STANDARDS

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
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Lead Dept.	CW-023	Reference Materials: Policies, Procedures, Brochures, Flyers, Manuals, etc: Produced by YOUR Department	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	OK to destroy after 2 years, whichever is longer; GC §34090
Lead Dept.	CW-024	Reports and Studies (Historically significant - e.g., Zoning Studies)	10 years	P	P	Administratively and Historically significant, therefore retained permanently; GC §34090
Lead Dept.	CW-025	Reports and Studies (other than Historically significant reports - e.g. Annual Reports)	10 years		10 years	GC §34090
Lead Dept.	CW-026	Special Projects / Subject Files / Issue Files	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090
Lead Dept.	CW-027	Subject / Reference Files: Subjects other than Specifically Mentioned in Retention Schedules	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	Department Preference; GC §34090 et seq.
Lead Dept.	CW-028	Supervisor's File - Personnel Issues	When No Longer Required		When No Longer Required	Ensure that originals of all official personnel records are provided to Human Resources. Supervisor's notes and other unofficial records or copies maintained by the supervisor retained for reference may be retained and discarded as determined by supervisor. GC §34090 et seq.

RECORDS RETENTION SCHEDULE: CITY-WIDE STANDARDS

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>Retentions apply to the department that is NOT the Office of Record (OFR), or the "Lead Department". If you are the OFR, refer to your department retention schedule.</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
<i>Litigation, claims, complaints, audits, public records act requests, and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Lead Dept.	CW-029	Surveys / Questionnaires (that the City issues). If a summary of the data is compiled, the survey forms are considered a draft or transitory record, and can be destroyed as drafts (When No Longer Required)	2 years		2 years	GC §34090
	CW-030	Tapes / DVD Recordings: See Boards & Commissions				
Lead Dept.	CW-031	Training - ALL COURSE RECORDS (Attendance Rosters, Outlines and Materials; includes Ethics & Safety training)	5 years		5 years	Department preference; Ethics Training is 5 years; Statewide guidelines propose 7 years; Calif. Labor Division is required to keep their OSHA records 7 years; EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; State Law requires 2 -3 years for personnel actions; 8 CCR §3203 et seq., 29 CFR 1627.3(b)(ii), LC §6429(c); GC §§12946, 34090, 53235.2(b)
Lead Dept.	CW-032	Volunteer / Unpaid Intern Applications & Agreements - Successful	Inactive / Separation + 3 years		Inactive / Separation + 3 years	Department preference (Courts treat volunteers as employees); EEOC/FLSA/ADEA (Age) requires 3 years for promotion, demotion, transfer, selection, or discharge; 29 CFR 1602.31 & 1627.3(b)(1)(i)&(ii), GC §§12946, 34090
Lead Dept.	CW-033	Volunteer / Unpaid Intern Applications & Agreements - Unsuccessful or Pending Applicants	3 years		3 years	GC §§12946, 34090

RECORDS RETENTION SCHEDULE: CITY ATTORNEY

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
<i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
City Attorney	CA-001	Amicus Briefs	2 years		2 years	GC §34090
City Attorney	CA-002	Attorney / Staff / Department Advice Files (All subjects)	When no Longer Required - Minimum 2 years		When no Longer Required - Minimum 2 years	GC §34090
City Attorney	CA-003	City Attorney Opinions	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090
City Attorney	CA-004	Claims	Resolution + 5 years		Resolution + 5 years	GC §§ 911.2, 945.6, 34090, 34090.6; PC §832.5
City Attorney	CA-005	Confidential Invoice Backup (not sent to Finance) legal invoices, etc.	2 years	3 years	5 years	GC §34090
City Attorney	CA-006	Lawsuits / Litigation	When no Longer Required - Minimum Final Resolution + 5 years		When no Longer Required - Minimum Final Resolution + 5 years	GC §§ 911.2, 945.6, 34090, 34090.6; PC §832.5

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
<i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
City Clerk	CC-001	Agenda Packets / Staff Reports - IMAGED (1999 & After) : City Council, Redevelopment / Successor Agency, Public Utilities Corporation	2 years	P	P	GC §34090 et seq.
City Clerk	CC-002	Agenda Packets / Staff Reports - NOT IMAGED (Prior to 1999) : City Council, Redevelopment / Successor Agency, Public Utilities Corporation	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090 et seq.
City Clerk	CC-003	Agreements & Contracts: ALL <i>Agreement or Contract includes all contractual obligations (e.g. Amendments, Scope of Work, Exchange Orders, or Successful Proposal)</i>	4 years	P	P	CCP §§337. 337.1(a), 337.15, 343; GC §34090, Contractor has retention requirements in 48 CFR 4.703
City Clerk	CC-004	Annexations / Boundaries / Consolidations / LAFCO	5 years	P	P	Land Records; GC §34090
City Clerk	CC-005	Annual Commission / Committee Notice of Vacancies per Maddy Act	2 years		2 years	2 CCR 18705.5; GC §34090
City Clerk	CC-006	Applications for Boards, Commissions or Committees - Successful	Term of Office + 2 years		Term of Office + 2 years	GC §34090
City Clerk	CC-007	Applications for Boards, Commissions or Committees - Unsuccessful	2 years		2 years	GC §34090
City Clerk	CC-008	Bid Packets / Unsuccessful Bids or Proposals	2 years		2 years	GC §34090
City Attorney	CC-009	Claim Forms	Copies - When No Longer Required		Copies - When No Longer Required	Copies (The City Attorney is the Office of Record); GC §34090.7

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
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City Clerk	CC-010	Economic Interest Filings (FPPC 700 Series Forms - Statement of Economic Interests): ALL	7 years		7 years	GC §81009(e),(f), & (g); 2 CCR 18615(d)
City Clerk	CC-011	Employee Bonds / Fidelity Bonds	When No Longer Required	P	P	GC §§36507, 34090; PC §§801.5, 803(c); 29 USC 1113
City Clerk	CC-012	FPPC Form 801 (Gift to Agency Report)	4 years		4 years	2 CCR 18944(c)(3)(G)
City Clerk	CC-013	FPPC Form 802 (Tickets Provided by Agency Report)	7 years		7 years	GC §81009(e)
City Clerk	CC-014	FPPC Form 806 (Agency Report of Public Official Appointments)	2 years		2 years	2 CCR 18705.5; GC §34090

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
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ELECTIONS - CONSOLIDATED						
City Clerk	CC-015	Prop. 218 Fees & Charges: Ballots and/or protest letters	2 years		2 years	GC §53753(e)(2)
City Clerk	CC-016	Prop. 218 Fees & Charges: Master Mailing List / Certifications	2 years		2 years	GC §34090
City Clerk	CC-017	Prop. 218 Fees & Charges: Undeliverable Mail	3 months		3 months	Transitory / Non-record; GC §34090 et seq.
City Clerk	CC-018	Campaign Filings (FPPC 400 Series Forms): SUCCESSFUL CANDIDATES (Elected Officials)	7 years	P	P	Paper must be retained for at least 2 years; GC §81009(b)(g)
City Clerk	CC-019	Campaign Filings (FPPC 400 Series Forms): UNSUCCESSFUL CANDIDATES	7 years		7 years	Paper must be retained for at least 2 years; GC §81009(b)(g)
City Clerk	CC-020	Campaign Filings (FPPC 400 Series Forms): THOSE NOT REQUIRED TO FILE ORIGINAL WITH CITY CLERK (copies)	7 years		7 years	Paper must be retained for at least 2 years; GC §81009(b)(g)
City Clerk	CC-021	Campaign Filings (FPPC 400 Series Forms): OTHER COMMITTEES (PACS - not candidate-controlled)	7 years		7 years	Paper must be retained for at least 2 years; GC §81009(c)(g)
City Clerk	CC-022	Candidate File: Nomination Papers, Candidate Statements, etc. - SUCCESSFUL CANDIDATES	Term of Office + 4 years		Term of Office + 4 years	EC §17100
City Clerk	CC-023	Candidate File: Nomination Papers, Candidate Statements, etc. - UNSUCCESSFUL CANDIDATES	Election + 4 years		Election + 4 years	EC §17100
City Clerk	CC-024	Elections - GENERAL, WORKING or ADMINISTRATION Files (Correspondence, Precinct Maps, County Election Services, Candidate Statements to be printed in the Sample Ballot, etc.)	2 years		2 years	GC §34090
City Clerk	CC-025	Elections - HISTORICAL (Sample ballot, copies of resolutions, final results)	2 years	P	P	GC §34090

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
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City Clerk	CC-026	Elections - Petitions (Initiative, Recall or Referendum)	Results, or Final Examination if No Election + 8 mo.		Results, or Final Examination if No Election + 8 mo.	The 8 month retention applies after election results, or final examination if no election, unless there is a legal or FPPC proceeding. EC §§17200, 17400
(End of Elections Section)						
City Clerk	CC-027	Ethics Training - Certificates	5 years		5 years	GC §§34090, 53235.2(b)
City Clerk	CC-028	Historical Records & Historical Projects (e.g. Incorporation, City Seal, Awards of significant historical interest, etc.)	5 years	P	P	City Clerk determines historical significance; records can address a variety of subjects and media; GC §34090
City Clerk	CC-029	Insurance Certificates - ALL	P		P	CCP §337 et. seq., GC §34090
City Clerk	CC-030	List of City Council Members and Mayors / Historical List of Council Members and Board & Commission Members	P		P	GC §34090
City Clerk	CC-031	Minutes - All Boards & Commissions, excluding Ad-Hoc	2 years	P	P	GC §34090
City Clerk	CC-032	Minutes - City Council, Redevelopment / Successor Agency, Public Utilities Corporation	2 years	P	P	GC §34090
City Clerk	CC-033	Municipal Code and History File	2 years	P	P	GC §34090
City Clerk	CC-034	Oaths of Office - Council, Board and Commission Members	14 years		14 years	GC §§36507, 34090; PC §§801.5, 803(c); 29 USC 1113
City Clerk	CC-035	Ordinances (City Council)	2 years	P	P	GC §34090 et. seq.
City Clerk	CC-036	Proof of Publication / Public Notices / Certificate of Posting (includes agendas)	2 years		2 years	GC §34090
City Clerk	CC-037	Real Property - Records that Affect the Title to Real Property (Abandonments, Deeds, Easements, Liens, Vacations, etc.)	2 years	P	P	GC §34090

RECORDS RETENTION SCHEDULE: CITY CLERK

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
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City Clerk	CC-038	Records Destruction Lists / Certificates of Records Destruction	P		P	GC §34090 et. seq.
City Clerk	CC-039	Records Retention Schedules / Amendments to Records Retention Schedules	P		P	GC §34090 et. seq.
City Clerk	CC-040	Request for Public Records	2 years		2 years	Employees are not required to retain the records produced, only the request; GC §34090
City Clerk	CC-041	Resolutions - City Council, Redevelopment / Successor Agency, Public Utilities Corporation	2 years	P	P	GC §34090 et. seq.
City Clerk	CC-042	Subpoenas / Discovery Requests / Personal Appearance / Duces Tecum	2 years		2 years	GC §34090
City Clerk	CC-043	Uniform Building Codes / California Building Codes	P		P	GC §50022.6

RECORDS RETENTION SCHEDULE: CITY MANAGER

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
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<i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
CITY MANAGER / ADMINISTRATION						
City Manager	CM-001	City Council Correspondence / Mayor's Correspondence / City Manager Correspondence	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090
City Manager	CM-002	Confidential Employee Recruitment Contracts / Applications (e.g. City Manager, City Attorney)	3 years		3 years	29 CFR 1602 et seq & 1627.3(a)(5) and (6), 2 CCR 7287.0(c)(2), GC §§12946, 34090
City Manager	CM-003	Grand Jury Reports & Responses	5 years		5 years	GC §34090
City Manager	CM-004	Newsletters to the City Council (Items of Interest)	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090
City Manager / Lead Dept.	CM-005	Projects, Programs, Events, Subject & Issues (Issues and/or projects will vary over time - e.g. Hotels, Developments, etc.)	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090

RECORDS RETENTION SCHEDULE: CITY MANAGER

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
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ECONOMIC DEVELOPMENT / REDEVELOPMENT / SUCCESSOR AGENCY						
City Manager / Econ. Dev.	CM-006	Census, Demographics	When No Longer Required		When No Longer Required	GC §34090 et seq.
City Manager / Econ. Dev.	CM-007	Department of Finance Schedule of Obligations: Approvals, Denials, Meet & Confer, etc.	10 years		10 years	GC §34090
City Manager / Econ. Dev.	CM-008	Economic Development Projects (Projects will vary over time - e.g. Proposed Hotels, etc.)	Minimum 2 years		Minimum 2 years	GC §34090
City Manager / Econ. Dev.	CM-009	Redevelopment / Successor Agency Project Files & Project Plans (Includes Environmental Assessments)	Project Completion + 5 years	P	P	GC §34090
City Manager / Econ. Dev.	CM-010	Redevelopment Plans (Historical)	Project Completion + 5 years	P	P	GC §34090
City Manager / Econ. Dev.	CM-011	Relocation Files Where Redevelopment was the Lead	Settle + 1 year	Settle + 4 years	Settle + 5 years	GC §§ 945, 34090, 34090.6; PC §832.5

RECORDS RETENTION SCHEDULE: CITY MANAGER

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
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PUBLIC AFFAIRS / CITY CHANNEL / CABLE TV / PIO						
City Manager / Public Affairs	CM-012	Cable TV Complaints	2 years		2 years	GC §34090
City Manager / Public Affairs	CM-013	Cable TV Franchise Administration / PACT Administration	Completion + 5 years		Completion + 5 years	GC §34090
City Manager / Public Affairs	CM-014	Cable TV Programming, Production & Scheduling	2 years		2 years	GC §34090
City Manager / Public Affairs	CM-015	Videos: Historical and Community Events	90 days	P	P	GC §34090
City Manager / Public Affairs	CM-016	Community Outreach	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090
City Manager / Public Affairs	CM-017	Emergency Preparedness Plans	Superseded + 2 years		Superseded + 2 years	GC §34090
City Manager / Public Affairs	CM-018	Newsletters to the Public (The Scene)	P		P	GC §34090

RECORDS RETENTION SCHEDULE: CITY MANAGER

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
<i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
City Manager / Public Affairs	CM-019	Proclamations / Commendations / Memoriums / Recognitions, etc.	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090
City Manager / Public Affairs	CM-020	Speech Notes / PowerPoint Presentations	When No Longer Required		When No Longer Required	GC §34090 et seq.
City Manager / Public Affairs	CM-021	Video Recordings of City Council Meetings, Planning Commission Meeting, or other public meetings	25 years		25 years	GC §§34090.7, 34090

RECORDS RETENTION SCHEDULE: COMMUNITY DEVELOPMENT

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
<i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
BUILDING						
Comm. Develop. / Building	CD-001	Building Permit Database (includes reports)	Indefinite		Indefinite	GC §34090, H&S §19850
Comm. Develop. / Building	CD-002	Complaints (Written)	2 years		2 years	GC §34090
Comm. Develop. / Building	CD-003	Construction Notices / Inspection Notices (correction notices, compliance orders, stop work notices, etc.)	2 years		2 years	GC §34090
City Clerk	CD-004	Cupertino's currently adopted model code as amended (California Building Codes / Uniform Building Codes)	Until Superseded Dept. to retain copies		Until Superseded	Previously adopted codes are maintained permanently by the City Clerk, who is the Office of Record; GC §34090.7

RECORDS RETENTION SCHEDULE: COMMUNITY DEVELOPMENT

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
<i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Comm. Develop. / Building	CD-005	Multi-Family Dwellings, Commercial and Industrial Buildings. Building Plans, Permits and Supporting Documents (including project that are expired or withdrawn) Supporting Documents include: Applications, Fee Estimator, Contractor / Subcontractor list, Owner Builder form, Soils / Geotechnical Reports, Structural Calculations, Special Inspection Reports, Specifications, Accessibility Hardship form, Alternate Materials & Methods form, Energy Compliance forms, Certificate of Occupancy, Green Bldg Checklist, & Hazardous Materials Questionnaire, Landscape Water Efficiency Checklist, Permit cancellation letters, PG&E / Gas / Electric Abandonment, Removal Letter (Building Demo)	P		P	GC §34090
Comm. Develop. / Building	CD-006	New Address Assignments; Change of Addresses	P		P	GC §34090, H&S §19850
Comm. Develop. / Building	CD-007	Plan Check Comments, Outside Agency Reports, Correspondence, Checklists, Temporary Certificate of Occupancy, etc.	Keep Until Permit is Finalled		Keep Until Permit is Finalled	Preliminary Drafts; GC §34090
Comm. Develop. / Building	CD-008	Public Records Requests / Requests & Permissions to Receive Copies of Plans	2 years		2 years	GC §34090 et seq.

RECORDS RETENTION SCHEDULE: COMMUNITY DEVELOPMENT

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<i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Comm. Develop. / Building	CD-009	Single Family Dwelling and Duplexes. Issued Building Plans, Permits and Supporting Documents (including project that are expired or withdrawn) Supporting Documents include: Applications, Fee Estimator, Contractor / Subcontractor list, Owner Builder form, Soils / Geotechnical Reports, Structural Calculations, Special Inspection Reports, Specifications, Accessibility Hardship form, Alternate Materials & Methods form, Energy Compliance forms, Certificate of Occupancy, Green Bldg Checklist, Landscape Water Efficiency Checklist, Permit cancellation letters, PG&E / Gas / Electric Abandonment, Removal Letter (Building Demo)	P		P	CBC 104.7, & 107.5, H&S§19850, GC §34090

RECORDS RETENTION SCHEDULE: COMMUNITY DEVELOPMENT

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CODE ENFORCEMENT						
Comm. Develop. / Code Enforce.	CD-010	Abandoned Vehicles	2 years		2 years	GC §34090 et seq.
Comm. Develop. / Code Enforce.	CD-011	Alarm Records / False Alarms	2 years		2 years	GC §34090 et seq.
Comm. Develop. / Code Enforce.	CD-012	Appeals - Administrative Citations	When No Longer Required - Minimum 5 years		When No Longer Required - Minimum 5 years	GC §34090 et seq.
Comm. Develop. / Code Enforce.	CD-013	Appeals - Parking Citations	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090 et seq.
Comm. Develop. / Code Enforce.	CD-014	Citations (Parking, Traffic, or Criminal)	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090 et seq.
Comm. Develop. / Code Enforce.	CD-015	Code Enforcement Case Files / Abatement Case Files / Administrative Citations (Includes appeals and Code Enforcement Complaint Letters, Complaints, Correction notices, Orders, etc.)	When No Longer Required - Minimum 5 years		When No Longer Required - Minimum 5 years	CFC §104.3.4, GC §34090

RECORDS RETENTION SCHEDULE: COMMUNITY DEVELOPMENT

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Comm. Develop. / Code Enforce.	CD-016	Crime Reports (Misdemeanor or Infractions)	2 years		2 years	GC §34090 et seq.
Comm. Develop. / Code Enforce.	CD-017	Liens	P		P	GC §34090(a)
Comm. Develop. / Code Enforce.	CD-018	Permits: Massage Solicitor, Handbill, Taxi	Expiration + 2 years		Expiration + 2 years	GC §34090 et seq.

RECORDS RETENTION SCHEDULE: COMMUNITY DEVELOPMENT

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HOUSING						
Community Develop. / Housing	CM-019	Housing Commission AGENDAS, AGENDA PACKETS	P		P	GC §34090
Community Develop. / Housing	CM-020	Housing Commission AUDIO RECORDINGS of Meetings / Audio Tapes	30 days, or After Minutes are Adopted, Whichever is Longer		30 days, or After Minutes are Adopted, Whichever is Longer	GC §54953.5(b)
City Clerk	CM-021	Housing Commission MINUTES	Copies - When No Longer Required		Copies - When No Longer Required	Send all originals to the City Clerk; GC §34090.7
Community Develop. / Housing	CM-022	Housing Programs: Affordable Housing Projects, Rehabilitation, First Time Home Buyers, Community Housing Development Organizations, CDBG & HOME WITH a Recapture / Resale Restriction Deeds and Title Insurance are sent to City Clerk	5 years	After the Affordability Period Terminates, or the Written Agreement Terminates, Whichever is Longer	5 years after the Affordability Period Terminates, or the Written Agreement Terminates, Whichever is Longer	24 CFR 85.42, 92.508(a)(c)(2) & 570.502(b), 29 CFR 97.42, GC §34090

RECORDS RETENTION SCHEDULE: COMMUNITY DEVELOPMENT

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
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<i>Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>						
Community Develop. / Housing	CM-023	Housing Programs: Affordable Housing Projects, Rehabilitation, First Time Home Buyers, Community Housing Development Organizations, CDBG & HOME WITHOUT a Recapture / Resale Restriction Deeds and Title Insurance are sent to City Clerk	Loan Pay-off + 5 years		Loan Pay-off + 5 years	24 CFR 85.42, 92.508(a)(c), & 570.502, 29 CFR 97.42

RECORDS RETENTION SCHEDULE: COMMUNITY DEVELOPMENT

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
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PLANNING						
Comm. Develop. / Planning	CD-024	Administrative Hearings AGENDAS, AGENDA PACKETS	P		P	GC §34090
Comm. Develop. / Planning	CD-025	Administrative Hearings AUDIO RECORDINGS of Meetings / Audio Tapes	30 days, or After Minutes are Adopted, Whichever is Longer		30 days, or After Minutes are Adopted, Whichever is Longer	GC §54953.5(b)
City Clerk	CD-026	Administrative Hearings MINUTES	Copies - When No Longer Required		Copies - When No Longer Required	Send all originals to the City Clerk; GC §34090.7
Comm. Develop. / Planning & City Clerk	CD-027	Annexations / Boundaries / Consolidations / LAFCO	5 years	P	P	Land Records; GC §34090
Comm. Develop. / Planning	CD-028	Design Review Commission AGENDAS, AGENDA PACKETS	P		P	GC §34090
Comm. Develop. / Planning	CD-029	Design Review Commission AUDIO RECORDINGS of Meetings / Audio Tapes	30 days, or After Minutes are Adopted, Whichever is Longer		30 days, or After Minutes are Adopted, Whichever is Longer	GC §54953.5(b)

RECORDS RETENTION SCHEDULE: COMMUNITY DEVELOPMENT

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City Clerk	CD-030	Design Review Commission MINUTES	Copies - When No Longer Required		Copies - When No Longer Required	Send all originals to the City Clerk; GC §34090.7
Comm. Develop. / Planning	CD-031	Environmental Determinations: Environmental Impact Reports (EIRs), Negative Declarations, etc.) Inside City boundaries	P		P	14 CCR §15095(c); GC §34090
Comm. Develop. / Planning	CD-032	Environmental Determinations: Environmental Impact Reports (EIRs), Negative Declarations, etc.) Outside City boundaries	When No Longer Required		When No Longer Required	Non-records
Comm. Develop. / Planning	CD-033	Environmental Review Commission AGENDAS, AGENDA PACKETS	P		P	GC §34090
Comm. Develop. / Planning	CD-034	Environmental Review Commission AUDIO RECORDINGS of Meetings / Audio Tapes	30 days, or After Minutes are Adopted, Whichever is Longer		30 days, or After Minutes are Adopted, Whichever is Longer	GC §54953.5(b)
City Clerk	CD-035	Environmental Review Commission MINUTES	Copies - When No Longer Required		Copies - When No Longer Required	Send all originals to the City Clerk; GC §34090.7
Comm. Develop. / Planning	CD-036	General Plan, Elements and Amendments	P		P	GC §34090

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Comm. Develop. / Planning	CD-037	Master Plans, Specific Plans, Bikeway Plans, etc.	P		P	GC §34090
Comm. Develop. / Planning	CD-038	Planning Commission AGENDAS, AGENDA PACKETS	P		P	GC §34090
Comm. Develop. / Planning	CD-039	Planning Commission AUDIO RECORDINGS of Meetings / Audio Tapes	30 days, or After Minutes are Adopted, Whichever is Longer		30 days, or After Minutes are Adopted, Whichever is Longer	GC §54953.5(b)
City Clerk	CD-040	Planning Commission MINUTES	Copies - When No Longer Required		Copies - When No Longer Required	Send all originals to the City Clerk; GC §34090.7
Comm. Develop. / Planning	CD-041	Planning Commission RESOLUTIONS	P		P	GC §34090
Comm. Develop. / Planning	CD-042	Planning Project Files - Approved & Unapproved Temporary Entitlements: Christmas Tree Lots , Banner, Garage Sales, Pumpkin Lots, Temporary Signs, etc.	2 years		2 years	GC§34090

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Comm. Develop. / Planning	CD-043	Planning Project Files - Permanent Entitlements (ALL) (Includes Associated CEQA Noticing, Conditions of Approval, Consultant's Reports, Public Noticing, Environmental Determinations, Staff Reports, Plans & Maps, arborist, architecture, geologic, noise, soils, traffic, and all other uniquely dated environmental and technical reports and studies; incomplete and complete letters; project approval and conditions of approval letters; and any other documents that project planner deems critical.) Examples: Conditional Use Permits (CUPs), Design Review, Lot Line Adjustments, Parcel Maps, Planned Unit Developments (PUD), Site Plans, Tentative Subdivisions, Variances, Zone Changes, etc.	3 years	P	P	14 CCR §15095(c); GC§§34090, 34090.7
Comm. Develop. / Planning	CD-044	Project Log Index / Spreadsheet / Binders of Historic Actions	P		P	GC§34090
Comm. Develop. / Planning	CD-045	Special Studies (authored by the City, not related to a particular subject. e.g. Noise / traffic in the Downtown Corridor, etc.)	P		P	GC§34090
Comm. Develop. / Planning	CD-046	Tree Removal Permits	3 years	P	P	GC§34090
Comm. Develop. / Planning	CD-047	Zoning Maps	P		P	Department Preference; City Clerk Maintains originals of all documents that were presented to Council; GC §34090.7

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City Clerk	CD-048	Zoning Ordinance Amendments, Reclassifications / Zone Change	3 years	P	P	Department Preference (copies); GC §34090.7

RECORDS RETENTION SCHEDULE: FINANCE

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FINANCE / ADMINISTRATION						
Finance / Admin.	FN-001	Assessment Districts / Community Facilities Districts, and similar documents - Financial Records / Assessor	2 years	3 years	5 years	GC §34090
Finance / Admin.	FN-002	Audit Reports / CAFR - Comprehensive Annual Financial Reports and related Audit Opinions	5 years	P	P	GC §34090.7
Finance / Admin.	FN-003	Audit Work Papers	5 years		5 years	GC §34090
Finance / Admin.	FN-004	Budgets - Adopted / Final	5 years	P	P	GC §34090, 40802, 53901
Finance / Admin.	FN-005	Budgets - Preliminary, Backup Documents	When No Longer Required		When No Longer Required	Preliminary drafts; GC §34090
Finance / Admin.	FN-006	Single Audits / Transportation Audits / PERS Audit, et.	2 years	3 years	5 years	GC §34090

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FINANCE / GENERAL ACCOUNTING						
Finance / General Accounting	FN-007	1099's Issued / W-9s	5 years		5 years	R&T §19530, GC §34090
Finance / General Accounting	FN-008	Accounts Payable / Invoices and Backup (Includes Invoices, Travel Expense Reimbursements, Warrant Request, and similar documents)	2 years	3 years	5 years	GC §34090
Finance / General Accounting	FN-009	FEMA Reimbursement Claims	2 years	8 years	10 years	GC §34090
Finance / General Accounting	FN-010	Bank Statements, Trustee Statements, and similar documents	2 years	3 years	5 years	GC §34090, 26 CFR 31.6001-1
Finance / General Accounting	FN-011	Bond Official Statements / Transcripts / Certificates of Participations (COPs) See Bank Statements for statement retention.	Fully Defeased + 10 years		Fully Defeased + 10 years	CCP §§336(a)(1) & (2), 337.5(a); GC §43900 et seq.
Finance / General Accounting	FN-012	Checks / Warrant Register Report (issued)	2 years	3 years	5 years	GC §34090, CCP § 337
Finance / General Accounting	FN-013	Checks / Warrants (Cashed)	2 years	3 years	5 years	GC §34090, CCP § 337
Finance / General Accounting	FN-014	Escheat (Unclaimed money / uncashed checks)	5 years		5 years	CCP §§340, 1519; GC §34090
Finance / General Accounting	FN-015	Financial Services Database	Indefinite		Indefinite	Data Fields / Records are interrelated; GC §34090

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Finance / General Accounting	FN-016	Fixed Assets - Annual Listing (Source Documents)	5 years		5 years	GC §34090
Finance / General Accounting	FN-017	Investment Reports / Treasurer's Reports (Report and Backup)	5 years		5 years	GC §34090
Finance / General Accounting	FN-018	Investments / Arbitrage / Certificate of Deposit / Investment Bonds (Receipts / Advisor Reports and Statements / Trade Tickets / LAIF (Local Agency Investment Fund))	5 years		5 years	GC§§ 34090, 43900
Finance / General Accounting	FN-019	Journal Entries / Journal Vouchers	2 years	3 years	5 years	GC §34090, CCP § 337
Finance / General Accounting	FN-020	Reports, Subsidiary Ledgers, Reconciliations, Transaction Histories, Balance Sheets, Revenue & Expenditure Reports, and similar documents (MONTHLY	When No Longer Required		When No Longer Required	GC §34090
Finance / General Accounting	FN-021	Reports: Annual State or Federal: State Controller's Report, Street Report, Local Government Compensation Report, and similar documents	5 years		5 years	Department Preference; Meets auditing standards; GC §34090

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FINANCE / PAYROLL						
Finance / Payroll	FN-022	CalPERS Reports	2 years	3 years	5 years	GC §34090
Finance / Payroll	FN-023	DE-6, 941 & DE-166 Forms - Quarterly Payroll Tax Returns / OASDI	2 years	3 years	5 years	IRS Reg §31.6001-1(e)(2), R&T §19530; 29CFR 516.5 - 516.6, 29USC 436, GC §34090
Finance / Payroll	FN-024	Deferred Compensation (City Statements)	2 years	3 years	5 years	GC §304090, 26 CFR 31.6001.1
Human Resources	FN-025	Payroll Employee Files (by employee name, includes W-4s, deductions, garnishments, and similar documents)	Copies - When No Longer Required		Copies - When No Longer Required	Human Resources retains originals; GC §34090.7
Finance / Payroll	FN-026	Payroll Registers	2 years	3 years	5 years	GC §34090
Finance / Payroll	FN-027	Time Sheets / Time Cards	2 years	3 years	5 years	IRS Reg §31.6001-1(e)(2), R&T §19530; LC § 1174(d); 29 CFR 516.5; GC §34090
Finance / Payroll	FN-028	W-2 Reports	2 years	3 years	5 years	IRS Reg §31.6001-1(e)(2), R&T §19530; 29CFR 516.5 - 516.6, 29USC 436, GC §34090
Finance / Payroll	FN-029	W-2's	2 years	P	P	IRS Reg §31.6001-1(e)(2), R&T §19530; 29CFR 516.5 - 516.6, 29USC 436, GC §34090

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FINANCE / REVENUE / ACCOUNTS RECEIVABLE						
Finance / Revenue	FN-030	Accounts Receivable - General - Business License Applications & Registrations and Renewal Responses, Transient Occupancy Tax (TOT), Parking Meters, Invoices to Outside Entities, and similar documents	2 years	3 years	5 years	GC §34090
Finance / Revenue	FN-031	Business License Renewal Notices, Payment Stubs	When No Longer Required		When No Longer Required	Preliminary drafts not retained in the ordinary course of business; GC §34090 et seq.
Finance / Revenue	FN-032	Business License Closure Letter / Confirmations Not Doing Business in City	2 years		2 years	GC §34090 et seq.
Finance / Revenue	FN-033	Accounts Receivable - Leases / Rent / Property Management	2 years	3 years	5 years	Statewide guidelines propose audit + 4 years; Published articles show 3 - 7 years; GC §34090
Finance / Revenue	FN-034	Daily Cash Receipts / Cashier Receipts	2 years	3 years	5 years	GC §34090 et seq.

RECORDS RETENTION SCHEDULE: HUMAN RESOURCES & RISK MANAGEMENT

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
(OFR)			Active (in office)	Inactive (Records Center)	Total Retention	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
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Human Resources	HR-001	Accident Reports (Potential Claims - Accidents to members of the public)	2 years		2 years	GC §34090
Human Resources	HR-002	Classification / Reorganization Studies (for employee classifications and department structures)	When No Longer Required - Minimum 3 years		When No Longer Required - Minimum 3 years	GC §§12946, 34090
Human Resources	HR-003	Classification Specifications / Job Descriptions	When No Longer Required - Minimum 6 years		When No Longer Required - Minimum 6 years	GC §§12946, 34090; 29 USC 1113
Human Resources	HR-004	Compensation Surveys & Studies	When No Longer Required - Minimum 3 years		When No Longer Required - Minimum 3 years	GC §§12946, 34090
Human Resources	HR-005	Confidential Invoice Backup (not sent to Finance) Benefit backup, legal invoices, etc.	2 years	3 years	5 years	GC §34090
Human Resources	HR-006	Department of Fair Employment & Housing (DFEH or EEOC) Claims	Final Disposition + 3 years		Final Disposition + 3 years	2 CCR 7287.0; GC §§12946, 34090
Human Resources	HR-007	DMV Pull Notices	Until Superseded or Separated		Until Superseded or Separated	GC §34090
Human Resources	HR-008	Drug & Alcohol Test Results (All - Positives and Negatives)	5 years		5 years	GC §§12946, 34090, 49 CFR 655.71 et seq.; 49 CFR 382.401 et seq.
Human Resources	HR-009	EEO-4 Reports and records required to generate EEO-4 report (Self-Identification Form, etc.)	3 years		3 years	29 CFR 1602.30

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Human Resources	HR-010	Grievances, Investigations, and Informal Complaints	Separation + 6 years		Separation + 6 years	GC §§12946, 12960, 34090
Human Resources	HR-011	I-9s	Separation + 3 years		Separation + 3 years	GC §§12946, 34090
Human Resources	HR-012	Insurance Policies: General Liability, Property, etc.	When No Longer Required	P	P	
Human Resources	HR-013	Labor Relations Files (Negotiation Notes, Correspondence, Interpretation of MOU Provisions, Documentation, etc.)	10 years		10 years	GC §34090
Human Resources	HR-014	OSHA Inspections & Citations, Log 200 and Log 300, 301, 301A, etc.	2 years	3 years	5 years	OSHA requires 5 years; State law requires 2 years; 8 CCR §3203(b)(1), GC §34090; LC §6429(c)
Human Resources	HR-015	Livescan Applications	2 years		2 years	GC §34090
Human Resources	HR-016	Livescan Clearance Sheets	Upon Separation		Upon Separation	GC §34090
Human Resources	HR-017	Personnel Files - Employees	Separation + 1 year	P	P	GC §§12946, 34090; 29 USC 1113
Human Resources	HR-018	Personnel Files - Medical File (all employees) Includes Pre-employment physicals, Respirator Fit Tests, etc.	Separation + 1 year	P	P	GC §§12946, 34090
Human Resources	HR-019	Recruitment and Testing File (Includes Advertisements, Job Brochures, Test Data, Testing Analysis & statistical Metric, Job Analysis, Rating Sheets, Scantrons, Rater's Profile & Confidentiality Agreement, Flowchart, Eligible Lists, etc.)	3 years		3 years	29 CFR 1602 et seq & 1627.3(a)(5) and (6), 2 CCR 7287.0(c)(2), GC §§12946, 34090
Human Resources	HR-020	Safety Committee Agendas	2 years	3 years	5 years	GC §§12946, 34090, 53235.2(b)

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Human Resources	HR-021	Studies & Surveys Conducted on Behalf of the City (Sick Leave, Attrition, Benefits, etc.)	When No Longer Required - Minimum 3 years		When No Longer Required - Minimum 3 years	GC §34090
Human Resources	HR-022	Workers' Compensation / Employee Accident Reports Includes all Accident, Incident, or Injury Reports and associated MSDS, Refusal of Medical Treatment of an Industrial Accident	Until Closed	P	P	8 CCR §3204(d)(1) et seq., 8 CCR 10102, 15400.2; GC §§12946, 34090

RECORDS RETENTION SCHEDULE: INFORMATION TECHNOLOGY

Office of Record	Retention No.	Records Description	Retention / Disposition			Comments / Reference
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Information Technology	IT-001	Backup Tapes - Daily	When No Longer Required		When No Longer Required	Used for Disaster Recovery Purposes Only; GC §34090 et seq.
Information Technology	IT-002	Backup Tapes - Weekly / Monthly		When No Longer Required	When No Longer Required	Used for Disaster Recovery Purposes Only; GC §34090 et seq.
Information Technology	IT-003	Inventory, Information Systems	When No Longer Required		When No Longer Required	Preliminary documents not retained in the ordinary course of business; GC §34090 et seq.
Information Technology	IT-004	Network Configuration Maps & Plans	When No Longer Required		When No Longer Required	Preliminary documents not retained in the ordinary course of business; GC §34090 et seq.

RECORDS RETENTION SCHEDULE: PARKS & RECREATION

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Parks & Rec.	P&R-001	Activity / Special Programs / Special Event Files Bingo, Children's Programs, Cultural Arts, Sports, Senior Programs, Filming, Theatre Programs and similar documents	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090
Parks & Rec.	P&R-002	Athletic Field Use Agreements (all other agreements are sent to the City Clerk)	Completion	5 years	Completion + 5 years	GC §34090
Finance	P&R-003	Cash Receipts (all detail sent to Finance)	1 year		1 year	GC §34090.7
Parks & Rec.	P&R-004	Check In List / Drop-in Classes	2 years		2 years	GC §34090
Parks & Rec.	P&R-005	Contractor's Payment Detail / Breakdown (not sent to Finance)	2 years	3 years	5 years	GC §34090 et seq.
Parks & Rec.	P&R-006	Credit Card Refunds (not sent to Finance)	2 years	3 years	5 years	GC §34090 et seq.
Parks & Rec.	P&R-007	Evaluations / Surveys (Program or Facility Evaluations)	When No Longer Required		When No Longer Required	Department Preference (Transitory record not retained in the ordinary course of business); GC §34090
Parks & Rec.	P&R-008	Facility Use Rental Contracts / McClellan Ranch Preserve Garden Plot Rental Agreements	2 years		2 years	GC §34090
Parks & Rec.	P&R-009	First Aid Reports (Accident reports are sent to Human Resources / Risk Management)	2 years		2 years	GC §34090
Parks & Rec.	P&R-010	Parks & Recreation Commission AGENDAS, AGENDA PACKETS	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §§34090, 54960.1(c)(1)

RECORDS RETENTION SCHEDULE: PARKS & RECREATION

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Parks & Rec.	P&R-011	Parks & Recreation Commission AUDIO RECORDINGS of Meetings / Audio Tapes	30 days, or After Minutes are Adopted, Whichever is Longer		30 days, or After Minutes are Adopted, Whichever is Longer	GC §54953.5(b)
City Clerk	P&R-012	Parks & Recreation Commission MINUTES	Copies - When No Longer Required		Copies - When No Longer Required	Send all originals to the City Clerk; GC §34090.7
Parks & Rec.	P&R-013	Rec Bucks Log / Rec Checks Log	2 years	3 years	5 years	GC §34090 et seq.
Parks & Rec.	P&R-014	Recreation Database	Indefinite		Indefinite	GC §34090
Parks & Rec.	P&R-015	Registration / Reservation Forms / Application Forms / Membership Applications / Fee & Charge / Liability Forms / Release of Liability Forms / Permissions / and similar documents: Camps, Field Trips, Authorization to give Medicine, and similar documents	3 years		3 years	GC §34090
Parks & Rec.	P&R-016	Senior Client Case Files	Inactive + 5 years		Inactive + 5 years	GC §34090
Parks & Rec.	P&R-017	Senior Memberships (renewed annually)	2 years		2 years	GC §34090
Parks & Rec.	P&R-018	Senior Nutrition Program	5 years		5 years	OMB Circular A-110 & A-133; GC §34090
Parks & Rec.	P&R-019	Senior Trips / Travel Program	4 years		4 years	GC §34090
Parks & Rec.	P&R-020	Sign-in / Sign-out sheets (Day camp, and similar documents)	2 years		2 years	GC §34090

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Parks & Rec.	P&R-021	Teen Commission AGENDAS, AGENDA PACKETS.	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §§34090, 54960.1(c)(1)
City Clerk	P&R-022	Teen Commission MINUTES & BYLAWS	Copies - When No Longer Required		Copies - When No Longer Required	Send all originals to the City Clerk; GC §34090.7
Parks & Rec.	P&R-023	Waivers of Liability	2 years		2 years	GC §34090

RECORDS RETENTION SCHEDULE: PUBLIC WORKS

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PUBLIC WORKS / ENGINEERING						
Public Works / Engineering	PW-001	Abandonments / Vacations (Streets)	P		P	GC §34090
Public Works / Engineering	PW-002	Aerial Maps / Photographs - Analog or Digital & Index to Aerials	P		P	GC §34090
Public Works / Engineering	PW-003	Assessment Districts / Community Facilities Districts / Maintenance Districts / Landscape & Lighting / Street Improvement District Projects / Underground Utility Districts (FORMATION, BOUNDARIES, ENGINEERS REPORTS, MAPS)	P		P	GC §34090
Public Works / Engineering	PW-004	Benchmarks, Center Line Ties, Survey Books	P		P	GC §34090
Public Works / Engineering	PW-005	Bicycle Pedestrian Commission AGENDAS, AGENDA PACKETS.	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §§34090, 54960.1(c)(1)
Public Works / Engineering	PW-006	Bicycle Pedestrian Commission AUDIO RECORDINGS of Meetings / Audio Tapes	30 days, or After Minutes are Adopted, Whichever is Longer		30 days, or After Minutes are Adopted, Whichever is Longer	GC §54953.5(b)
City Clerk	PW-007	Bicycle Pedestrian Commission MINUTES & BYLAWS	Copies - When No Longer Required		Copies - When No Longer Required	Send all originals to the City Clerk; GC §34090.7

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Public Works / Engineering	PW-008	Block Party Permits	2 years		2 years	GC §34090 et seq.
Public Works / Engineering	PW-009	Bonds: Construction Bonds / Subdivision Bonds	Release of Bond / Security		Release of Bond / Security	Securities (Performance Bonds, Letters of Credit, CD's, etc.) are released after the Notice of Completion is issued and released according to the bond release schedule, which is fully released 1 year after the Notice of Completion date; GC §34090
Public Works / Engineering	PW-010	Capital Improvement Projects (CIP): <u>Administration File</u> Budget, Bid Set and Conform Set of Drawings, Estimates, Advertisement / Notice Inviting Bids / Bid Results, Project Administration, Certified Payrolls, Correspondence / Notices, Council or Commission Staff Reports & Minutes, Preliminary Notices / Stop Notices, Presentations, Progress Payments, Project Schedules, Meeting Notes, Progress meetings, Public Information Real Estate Appraisals, Bond Release Letters, etc.	Upon Completion	10 years or After Funding Agency Audit, if required, whichever is longer	Completion + 10 years or After Funding Agency Audit, if required, whichever is longer	GC §34090

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Public Works / Engineering	PW-011	Capital Improvement Projects (CIP): <u>Permanent File</u> Plans, Specifications & Addenda, Agreement / Contract, Successful Proposal, Change Orders, Construction Manager's Logs, Daily Inspections, Easements, Environmental / EIRs, Negative Declarations, Categorical Exemptions, Field Authorizations, Materials Testing Reports, Grading Permits, Insurance Certificates, Hazardous Materials Plans, Notice of Completion, Photos, Real Property Acquisitions, RFIs & Responses, Soils Reports, Studies, Submittals, Surveys, etc.	Upon Completion	P	P	GC §34090
Lead Dept.	PW-012	Capital Improvement Projects (CIP): <u>Unsuccessful Proposals</u>	2 years		2 years	GC §34090
Lead Dept.	PW-013	Correspondence - Regulatory Agencies	When No Longer Required - Minimum 10 years		When No Longer Required - Minimum 10 years	GC §34090
City Clerk & Public Works / Engineering	PW-014	Deeds, Easements	P		P	Finals are maintained by City Clerk; GC §34090 et seq.
Public Works / Engineering	PW-015	Design & Construction Standards	P		P	GC §34090

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Public Works / Engineering	PW-016	Drawings, Maps, Plans and Record Drawings, Large-Format Drawings, Survey Record Maps, Capital Improvement Project "As-Builts"	P		P	Drafts should be destroyed; GC §34090, 34090.7
		FINALS				
Public Works / Engineering	PW-017	Encroachment Permits - Permanent Encroachments	P		P	Department file may include correspondence; GC §34090 et seq.
Public Works / Engineering	PW-018	Encroachment Permits - Public Right of Way, Street Permits, Temporary Construction, Traffic Control, Utility Cuts etc.	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	If work performed is subject to a warranty, Minimum 2 years after expiration of the warranty; GC §34090
Public Works / Engineering	PW-019	Engineering Studies / Surveys - Preliminary Studies / Project Assessments (Not Acquired or Developed)	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090
Public Works / Engineering	PW-020	Engineering Studies / Surveys (City Built Projects)	P		P	GC §34090
Public Works / Engineering	PW-021	Geotechnical and Soils Reports; Hydrology Reports (Authored or Purchased by the City)	P		P	GC §34090
Public Works / Engineering	PW-022	Grading Permits & Plans	P		P	GC §34090
Comm. Develop. / Building	PW-023	Plan Checks for Building Permits	When No Longer Required		When No Longer Required	Preliminary drafts; GC §34090 et seq.

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Public Works / Engineering	PW-024	Private Development Projects / Job Files: <u>Administration File</u> Correspondence, Project Schedules, etc. <i>Examples of types of Private Development Projects: CUPs, Lot Line Adjustments, Parcel Maps, Precise Alignment, Specific Plans, Split Lots, Subdivisions, Tracts, TPMs, TSMS</i>	Upon Completion	10 years	Completion + 10 years	GC §34090
Public Works / Engineering	PW-025	Private Development Projects / Job Files: <u>Permanent Files</u> Construction Inspections, Dedications, Drainage, Driveway, Easements, Encroachments, Final Reports, Grading Plans, Photos, Private Lab Verifications, Rights of Way, Stormwater, Testing Lab Verifications, etc. <i>Examples of types of Private Development Projects: CUPs, Lot Line Adjustments, Parcel Maps, Precise Alignment, Specific Plans, Split Lots, Subdivisions, Tracts, TPMs, TSMS</i>	Upon Completion	P	P	GC §34090
Public Works / Engineering	PW-026	Project-related Petitions (submitted to Council related to a proposed project). Examples: parking requests, traffic calming requests, etc.	2 years		2 years	May be sent to Public Works or other departments, depending upon the subject of the petition; For Initiative, Recall or Referendum petitions, see the City Clerk schedule GC §34090

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Public Works / Engineering	PW-027	Public Safety Commission AGENDAS, AGENDA PACKETS.	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §§34090, 54960.1(c)(1)
Public Works / Engineering	PW-028	Public Safety Commission AUDIO RECORDINGS of Meetings / Audio Tapes	30 days, or After Minutes are Adopted, Whichever is Longer		30 days, or After Minutes are Adopted, Whichever is Longer	GC §54953.5(b)
City Clerk	PW-029	Public Safety Commission MINUTES & BYLAWS	Copies - When No Longer Required		Copies - When No Longer Required	Send all originals to the City Clerk; GC §34090.7
City Clerk & Public Works / Engineering	PW-030	Real Property Acquisitions / Sale	P		P	Final agreements are maintained by City Clerk; GC §34090 et seq.
Public Works / Engineering	PW-031	Rights of Ways, Covenants, Liens	P		P	Finals are maintained by City Clerk; Department file may include correspondence; GC §34090 et seq.

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PUBLIC WORKS / ENVIRONMENTAL SERVICES						
Public Works / Environ. Services	PW-032	Environmental Services / Solid Waste / AB 939 Compliance; Reports to California Integrated Waste Management Board, Tonnage Reports, etc.	10 years		10 years	GC §34090
Public Works / Environ. Services	PW-033	NPDES Monitoring and Inspections - Stormwater	When No Longer Required - Minimum 3 years		When No Longer Required - Minimum 3 years	40 CFR §§122.21, 122.41; CCP §337 et seq.
Public Works / Environ. Services	PW-034	NPDES Permits - Stormwater	Permit Superseded + 3 years		Permit Superseded + 3 years	40 CFR §§122.21, 122.41; CCP §337 et seq.

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PUBLIC WORKS / TRAFFIC ENGINEERING						
Public Works / Engineering	PW-035	Studies - Transportation	When No Longer Required - Minimum 5 years		When No Longer Required - Minimum 5 years	GC §34090
Public Works / Engineering	PW-036	Traffic Complaints	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090
Public Works / Engineering	PW-037	Traffic Signal Cabinet Prints	When No Longer Required		When No Longer Required	Preliminary drafts not retained in the ordinary course of business; GC §34090
Public Works / Engineering	PW-038	Traffic Signal Inventory / Timing	When No Longer Required		When No Longer Required	Preliminary drafts not retained in the ordinary course of business; GC §34090
Public Works / Engineering	PW-039	Traffic Signals (locations, inspections, pole & structure maintenance)	P		P	Drafts should be destroyed; GC §34090
Public Works / Engineering	PW-040	Traffic Speed Surveys	Until Superseded		Until Superseded	GC §34090
Public Works / Engineering	PW-041	Traffic Studies / Traffic Counts / Traffic Calming Requests	When No Longer Required - Minimum 2 years		When No Longer Required - Minimum 2 years	GC §34090

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<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>						
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>						
<i>Copies, drafts, notes and non-records do not require authorization, and can be destroyed when they are no longer required.</i>						
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Public Works / Engineering	PW-042	Transportation Master Plans / Traffic Master Plans	P		P	Department preference; Drafts should be destroyed; GC §34090
Public Works / Engineering	PW-043	Videos - Traffic / Intersections	When No Longer Required		When No Longer Required	Does not record regular, ongoing operations of the City; Preliminary drafts not retained in the ordinary course of business; GC §34090 et seq.

RECORDS RETENTION SCHEDULE: PUBLIC WORKS

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PUBLIC WORKS / OPERATIONS						
Public Works / Operations	PW-044	Alternative Fuel Vehicles Surveys (CNG, etc.)	2 years		2 years	GC §34090
Public Works / Operations	PW-045	AQMD Permits (Generators, etc.)	Current + 2 years		Current + 2 years	GC §34090
Public Works / Operations	PW-046	Confined Space Entries	3 years		3 years	8 CCR §5158
Lead Dept.	PW-047	Correspondence - Regulatory Agencies	When No Longer Required - Minimum 10 years		When No Longer Required - Minimum 10 years	GC §34090
Public Works / Operations	PW-048	Daily Worksheets / Daily Logs (document tree trimming, sidewalk repair, etc.)	10 years		10 years	GC §34090
Public Works / Operations & Fire	PW-049	Fuel and Gas Usage (Fuel Master)	5 years		5 years	GC §34090
Public Works / Operations	PW-050	Generator Operation Logs (for fixed / stationary generators) / Inspections	3 years		3 years	GC §34090
Public Works / Operations	PW-051	Hazardous Waste Manifests / Certificates of Disposal	5 years	P	P	40 CFR 262.40, 8 CCR 3204(d)(1)(A), 22 CCR 66262.40

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Public Works / Operations	PW-052	Operations & Maintenance Manuals (O&M Manuals)	Life of Facility or Equipment - Minimum 2 years		Life of Facility or Equipment - Minimum 2 years	GC §34090
Public Works / Operations	PW-053	Pesticide Application Records	2 years		2 years	GC §26202; 3 CCR 6623, 40 CFR 171.11 et seq.
Public Works / Operations	PW-054	Pool Chemical Additions / Logs (Chlorine, Muriatic Acid)	30 years		30 years	8 CCR §3204(d)(1) et seq., GC §§12946, 34090
Public Works / Operations	PW-055	Pre-Trip Inspections / DOT Program / CHP Inspections / Vehicle Safety Checks / Daily Vehicle Inspections / Daily Equipment Checks	2 years		2 years	GC §34090
Public Works / Operations	PW-056	Underground Service Alerts (USA's)	5 years		5 years	GC §34090
Public Works / Operations & Fire	PW-057	Underground Storage Tank (City Owned) UST Monitoring, Inspections and Maintenance, Release Detection Systems, Cathodic Protection Maintenance Records	7 years		7 years	23 CCR 2712(b); H&S §25284.4(i)
Public Works / Operations & Fire	PW-058	Underground Storage Tanks - USTs (City Owned) Repairs, Lining, Upgrade Records	Life of the Tank		Life of the Tank	23 CCR 2712(b), H&S §25284.4(i)
Public Works / Operations & Fire	PW-059	Underground Storage Tanks (City-Owned) Location, Removal, Soil Remediation, Monitoring Well Records	10 years	P	P	23 CCR 2712(b), H&S §25284.4(i); GC §34090 et. seq.

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Public Works / Operations	PW-060	Used Oil Disposal	3 years		3 years	22 CCR 66266.130(c)(5), H&S §25250.18(b), 25250.19(a)(3) et seq.
Public Works / Operations	PW-061	Vehicle Accident Reports (City Vehicles)	2 years		2 years	GC §34090
Public Works / Operations	PW-062	Vehicle & Equipment Database	Indefinite		Indefinite	Data Fields / Records are interrelated; GC §34090
Public Works / Operations	PW-063	Vehicle & Equipment History Files Maintenance, Crane Certifications, Smog Certificates, Registrations	Disposal of Vehicle or Equipment + 2 years		Disposal of Vehicle or Equipment + 2 years	8 CCR § 3203(b)(1); 49 CFR 396.21(b)(1); 49 CFR 396.3(c); CCP §337 et. Seq., GC §34090
Public Works / Operations	PW-064	Work Orders / Service Requests CMMS DATABASE (Computerized Maintenance Management System)	Indefinite		Indefinite	Data is interrelated; GC §34090
Public Works / Operations	PW-065	Work Orders / Service Requests - All Information Entered in CMMS Database	When No Longer Required		When No Longer Required	Preliminary drafts (the database is the original); GC §34090
Public Works / Operations	PW-066	Work Orders / Service Requests - NOT entered in CMMS Database (or partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	5 years		5 years	CCP §§338 et seq., 340 et seq., 342, GC §§945.6, GC §34090