



**LAKE SHASTINA COMMUNITY SERVICES DISTRICT**

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**RESOLUTION NO. 3 -14**

**A RESOLUTION OF THE BOARD OF DIRECTORS OF THE LAKE SHASTINA COMMUNITY SERVICES DISTRICT REGARDING A POLICY FOR THE RETENTION AND DESTRUCTION OF DISTRICT RECORDS, DOCUMENTS AND PAPERS PURSUANT TO THE GOVERNMENT CODE OF THE STATE OF CALIFORNIA .**

**WHEREAS**, it is the responsibility of the Board to preserve and maintain the records of the Lake Shastina Community Services District; and

**WHEREAS**, the Board wishes to adopt and comply with a record retention schedule; and

**WHEREAS**, Government code allows the Board to authorize at any time the destruction or disposition of any record, duplicate record, paper, or document, the original or a permanent photographic record of which is in the files of any officer or department of the district: and

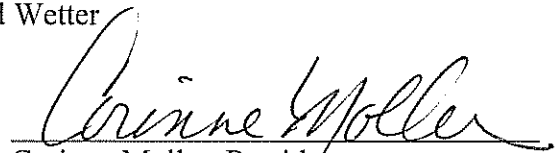
**WHEREAS**, the board desires to authorize the destruction of records currently exceeding the required retention guidelines.

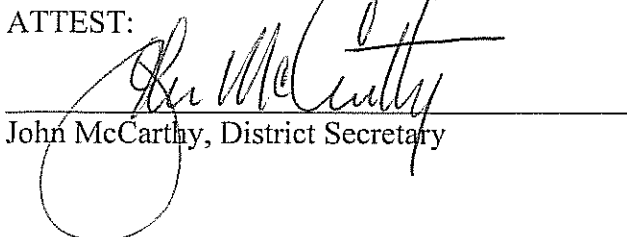
**NOW, THEREFORE, IT IS RESOLVED AS FOLLOWS:** The Board shall adopt and comply with the Local Government Records Management Guidelines provided by the Secretary of State pursuant to Sections 60200, 12236. (Exhibit A: most current August 1999 attached) and shall authorize and allow the destruction of records following the same guidelines. The policy will be updated as needed upon recommendations received from legal counsel, CPA or Auditor, or per California code. The destruction of these files will be professionally shred.

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I hereby certify that the forgoing is a full, true and correct copy of Resolution 3-14 duly passed and adopted by the Board of Directors of the Lake Shastina Community Services District, Siskiyou County, California, at a meeting thereof duly held on the **16th** day of **April, 2014** by the following vote:

AYES: Directors Cupp, Mitchell, Moller, Roths and Wetter  
NOES: None  
ABSENT: None

  
Corinne Moller, President

ATTEST:  
  
John McCarthy, District Secretary

# **LOCAL GOVERNMENT RECORDS RETENTION GUIDELINES**

**August 1999  
City Clerks' Association of California  
California State Archives 2002 Version**

# LOCAL GOVERNMENT RECORDS RETENTION GUIDELINES

## TABLE OF CONTENTS

DISCLAIMER.....C-3

RECORD CLASSIFICATIONS.....C-4

ITEM INDEX.....C-5

LEGEND & CITATIONS.....C-16

ADMINISTRATIVE RECORDS.....C-17

DEVELOPMENT RECORDS.....C-25

FINANCE RECORDS.....C-29

PUBLIC SAFETY RECORDS.....C-32

    EMERGENCY MANAGEMENT.....C-32

    FIRE SAFETY.....C-32

    HAZARDOUS MATERIALS.....C-33

    LAW ENFORCEMENT.....C-33

PUBLIC WORKS.....C-42

TRANSPORTATION.....C-47

## Disclaimer

### Local Government Retention Schedule Guidelines

The guidelines as enclosed have been endorsed by resolution of the General Assembly of the League of California Cities, and by the City Clerks Association of California. They represent extensive research as to the *minimum legal requirements* for the retention of local government records and do not reflect the administrative, operational, financial or historical needs of the jurisdiction. It is strongly recommended that cities consult with legal counsel when formulating their retention schedules so as to best meet their particular needs.

The committee's research was as complete as possible and reviewed by many legal officers but may not include every record series pertinent to local government. The guidelines are just that and are fluid, very much subject to additions and updates which will be coordinated through the office of the State Archivist under the Secretary of State.

Reference to retention periods, unless otherwise indicated, refers to the current year plus the years shown. For example, Cu + 2 refers to the Current year plus two, or 1998 plus years 1997 and 1996.

**RECORDS RETENTION CLASSIFICATIONS - CITY GOVERNMENT**

**August 1999**

**ADMINISTRATION**

Audit  
Community Services  
Elections  
General Subject  
Grants  
Human Resources  
Information Services  
Legal/Legislative  
Municipal Clerk  
Policies & Procedures  
Public Information  
Public Financing Authority  
Risk Management

**DEVELOPMENT**

Administration  
Building  
Code Enforcement  
Engineering  
Environmental Quality  
Housing  
Municipal Facilities  
Planning  
Property  
Redevelopment

**FINANCE**

Accounting  
Administrative Services  
Fixed Assets  
License  
Payroll  
Purchasing  
Reports  
Treasurer

**PUBLIC SAFETY**

Animal Control\*  
Emergency Management  
Fire Safety  
    Administration  
    Personnel  
    Property  
    Reports  
Hazardous Materials  
Health & Welfare  
Law Enforcement  
    Administration  
    Investigations  
    Patrol  
    Services

**PUBLIC WORKS**

Parks  
Sanitation/Solid Waste/  
    Wastewater  
Streets/Alleys  
Utilities  
Water

**TRANSPORTATION**

Administration  
Airport  
Ground Transportation  
Harbor

\*Anticipate will be addressed by County Officials

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**INDEX**

<b>ITEM</b>	<b>CATEGORY</b>	<b>PAGE</b>
Abandoned Vehicles	Development	C-26
Abandonment	Development	C-28
Abandonment/Vacations	Public Works	C-43
Accident Reports - City Assets	Administration	C-24
Accounting/Cash Reconciliation	Public Safety	C-33
Accounts Payable	Finance	C-29
Accounts Receivable	Finance	C-29
Acquisition/Disposition	Development	C-28
Adjustments	Finance	C-29
Administration -- General Subject	Administration	C-19
Administration -- Public Financing Authority	Administration	C-23
Administrative/Internal	Public Safety	C-33
Affidavit Index	Administration	C-17
Agenda Reports (Master, Subject Files)	Administration	C-22
Agendas	Administration	C-22
Agendas, Board	Public Works	C-42
Agreements	Transportation	C-47
Air Quality	Development	C-27
Airport Certification	Transportation	C-47
Airport Noise Monitoring and Complaint	Transportation	C-47
Alarm Records	Public Safety	C-33
Annexation Case Files	Development	C-28
Annual Financial Report	Administration	C-17
Apparatus/Vehicle	Public Safety	C-32
Appeals, Civil	Administration	C-22
Applications - Aircraft Storage	Transportation	C-47
Applications - Parking	Transportation	C-47
Applications - Slip Rentals	Transportation	C-47
Applications - Special Events	Transportation	C-47
Applications	Finance	C-29
Applications, Absentee Ballots	Administration	C-17
Applications, Boards, Commissions, Committees	Administration	C-22
Appraisals	Development	C-28
Acquisition/Disposition	Development	C-28
Arrest/Conviction	Public Safety	C-36
Articles of Incorporation	Administration	C-22
Asbestos	Development	C-27
Assessment Districts	Administration	C-23
Assessment Districts	Finance	C-29
Asset Forfeiture - Investigations/Proceedings Case File	Public Safety	C-34
Asset Forfeiture - Notifications	Public Safety	C-34
Assisted, Challenged Voters List	Administration	C-17
Audits	Finance	C-30
Auto for Hire	Transportation	C-48
Ballots	Administration	C-17
Ballots -- Prop. 218	Administration	C-17
Bank Reconciliation	Finance	C-29
Bank Statements	Finance	C-30
Benchmark Data	Development	C-25
Benefit Plan Claims	Administration	C-20
Benefit Plan Enrollment, Denied	Administration	C-20

LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES	ATTACHMENT C
--	--------------

**INDEX**

ITEM	CATEGORY	PAGE
Bids & Proposals (Unsuccessful)	Development	C-25
Bids, RFQ's, RFP's	Finance	C-30
Billing Records	Finance	C-29
Billing/Customer Records	Public Works	C-44
Biographies	Administration	C-19
Blueprints, Specifications	Development	C-26
Bond, Personnel Fidelity	Administration	C-20
Bonds - Administration	Finance	C-31
Bonds - Security	Development	C-25
Bonds - Development	Development	C-25
Bonds - Account Statements	Finance	C-31
Bonds - Bonds and Coupons	Finance	C-31
Bonds	Administration	C-17
Bonds	Development	C-27
Bonds, Insurance	Administration	C-24
Books, Fire Code	Public Safety	C-32
Brochures, publications, newsletter, bulletins	Administration	C-24
Budget adjustments, journal entries	Finance	C-29
Budget Operating (copies)	Administration	C-17
Budget Operating (copies)	Finance	C-29
Budget	Administration	C-17
Budget, Accounting	Finance	C-29
Budget, Adopted	Finance	C-29
Budget, Proposed	Finance	C-29
Business License	Finance	C-29
Calendar	Administration	C-17
Calendar, City	Administration	C-24
California Environmental Quality Act (CEQA)	Development	C-27
Canvass	Administration	C-17
Capital Improvement Projects	Development	C-27
Capital Improvements, Construction	Development	C-28
Cards - Dispatch	Public Safety	C-38
Cards - Field Interview	Public Safety	C-38
Case Books, Investigative	Public Safety	C-34
Case Files - Homicide Investigator's File	Public Safety	C-34
Case Files - Narcotics (No arrest, Narcotics Cases)	Public Safety	C-34
Case Files - Officer Involved Shootings	Public Safety	C-34
Case Files	Development	C-26
Case Files, Planning and Zoning	Development	C-28
Case Log	Administration	C-22
Case Records - (High Profile)	Administration	C-22
Case Records - (Routine)	Administration	C-22
Certificates (Building)	Development	C-26
Certificates (Planning)	Development	C-28
Certificates of Election	Administration	C-17
Charter - Amendments/Measures	Administration	C-17
Checks	Finance	C-29
Chemicals/Film Inventories	Public Safety	C-39
Citations - 11357(e), Juvenile	Public Safety	C-38
Citations - 11357b H&S, 11357c H&S, 11360b H&S Violations	Public Safety	C-38
Citations - California Vehicle Code Infractions (Duplicates)	Public Safety	C-39

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**INDEX**

<b>ITEM</b>	<b>CATEGORY</b>	<b>PAGE</b>
Citations - Cite and Release	Public Safety	C-38
Citations - Parking/Traffic, Duplicates	Public Safety	C-39
Citations - Transmittals	Public Safety	C-39
Claim Files	Public Safety	C-33
Claims, Damage	Administration	C-24
Classifications and Appointments	Administration	C-19
Closures	Public Works	C-43
Code Books	Development	C-25
Collections/Landfill	Public Works	C-42
Community Development Block Grant and Urban Development	Administration	C-19
Community Services – Library	Administration	C-17
Community Services – Plaques	Administration	C-17
Community Services – Sports Organization	Administration	C-17
Congestion Management	Development	C-27
Connection Records	Public Works	C-44
Construction (Approved)	Development	C-26
Construction Tracking, Daily	Development	C-27
Contractor	Development	C-25
Contracts and Agreements – Excl. Capital Improvement	Administration	C-22
Contracts and Agreements – Incl. Capital Improvement	Administration	C-22
Correspondence	Administration	C-19
Correspondence	Development	C-25
Court - Daily Schedule	Public Safety	C-34
Court - Sign-In Logs	Public Safety	C-34
Court - Tracking System Records	Public Safety	C-34
Crime - Felony Crimes With Or Without Arrests	Public Safety	C-36
Crime - Misdemeanor/Infractions	Public Safety	C-36
Crime - Supplemental, Felony Capital Crimes, Crimes Punishable by Death, Life Imprisonment	Public Safety	C-36
Deeds & Promissory Notes	Development	C-28
Deferred Compensation	Finance	C-30
Department Manual	Public Safety	C-33
Deposits, Receipts	Finance	C-29
Destruction - Guns	Public Safety	C-36
Destruction - Narcotics	Public Safety	C-36
Development (includes CDBG)	Development	C-25
Development Agreements	Development	C-25
Development Conditions	Development	C-25
Development Standards	Development	C-25
Disposition of Arrest/Court Action	Public Safety	C-36
Drawings, Project Plan	Development	C-25
Drawings, Traffic Control Plan	Development	C-27
Easements, Dedications, Rights-of-Way	Public Works	C-43
Employee Handbook	Administration	C-20
Employee Programs	Administration	C-20
Employee Rights	Administration	C-20
Employee Time Sheets	Finance	C-30
Environmental Review	Development	C-27
Equipment - Communication	Public Safety	C-33
Equipment - Inventory	Public Safety	C-33
Equipment - Inventory/Sign-out Cards- Photo Lab	Public Safety	C-39



**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**INDEX**

<b>ITEM</b>	<b>CATEGORY</b>	<b>PAGE</b>
Equipment - Operations Files - Photo Lab	Public Safety	C-39
Equipment - Radio Logs (Communication)	Public Safety	C-39
Evidence, Disposition Forms	Public Safety	C-34
Exposure - Personnel	Public Safety	C-32
Facilities (Sanitation/Solid Waste/Wastewater)	Public Works	C-42
Facilities (Utilities)	Public Works	C-44
Facility Rentals/Use	Development	C-28
Fair Political Practices - Administration, Statements	Administration	C-18
Fair Political Practices - Campaign disclosure, elected	Administration	C-18
Fair Political Practices - Campaign disclosure, not elected	Administration	C-18
Fair Political Practices - Campaign disclosure, unsuccessful	Administration	C-18
Fair Political Practices - Candidate Statements	Administration	C-18
Fair Political Practices - History	Administration	C-18
Fair Political Practices - Statement of Economic Interest, Elected	Administration	C-18
Fair Political Practices - Statement of Economic Interest, not elected	Administration	C-18
False Alarm (Duplicate)	Public Safety	C-36
Federal and State Grants	Administration	C-19
Field Books	Public Works	C-43
Field, Non-fire and Logs	Public Safety	C-32
Financial, Annual	Finance	C-30
Financial Records - Grants	Administration	C-19
Financial Records, Public Financial Authority	Administration	C-24
Fingerprint - Applicants Files	Public Safety	C-34
Fingerprint - Inked/Palm Cards	Public Safety	C-34
Fingerprint - Records Latent	Public Safety	C-34
Fingerprint - Suspect, Adult/Juvenile	Public Safety	C-34
Fire, Non-arson and Logs	Public Safety	C-32
Flood Control - Drainage Facilities	Public Works	C-44
Flood Control - Flood Zones	Public Works	C-44
Flood Control - Insurance Programs	Public Works	C-44
Flood Control - Polices/Procedures	Public Works	C-45
Flood Control - Reports/Studies	Public Works	C-45
Flood Control	Development	C-27
Flood Records	Development	C-28
Franchises	Development	C-25
Fueling	Transportation	C-47
Gas & Electric Rates	Public Works	C-44
General Administrative	Administration	C-23
General Orders	Public Safety	C-39
General Orders, Policies/Procedures	Public Safety	C-32
General Plan Amendments - Approved	Development	C-28
General Plan Amendments - Denied	Development	C-28
General Plan and Elements	Development	C-28
General Subject Files	Development	C-25
Goals & Objectives	Administration	C-19
Grants - Parks (refer to Admin.)	Public Works	C-42
Grants - Street/Alleys (see Admin.)	Public Works	C-43
Grants - Water (see Admin.)	Public Works	C-45
Grants, Community/Urban Development (includes CDBG)	Development	C-25
Grievance Files	Public Safety	C-40

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**INDEX**

<b>ITEM</b>	<b>CATEGORY</b>	<b>PAGE</b>
Guns, Dealers Record of Sale	Public Safety	C-34
Hazardous Waste Disposal	Public Safety	C-33
Hazardous Waste Disposal	Transportation	C-47
Hearing or Review	Administration	C-17
Historic Preservation Inventory	Development	C-25
History, Sanitation	Public Works	C-42
Hourly Employees	Administration	C-20
Immigrant	Administration	C-20
Incident Files	Development	C-25
Incident Reports	Administration	C-24
Incident	Public Safety	C-32
Incineration Plants, Sludge	Public Works	C-42
Incinerator Operations, Treatment Plant	Public Works	C-42
Index, Attorney Case	Administration	C-22
Informant Files	Public Safety	C-34
Inspection	Development	C-26
Inspection, Runway	Transportation	C-47
Inspection, Safety Self	Transportation	C-47
Inspections, Fire Prevention	Public Safety	C-32
Insurance, ACCEL JT Powers Agreement	Administration	C-24
Insurance, Certificates	Administration	C-24
Insurance, Liability/Property	Administration	C-24
Insurance, Workers Compensation	Administration	C-24
Internet, World Wide Web	Administration	C-22
Interpretations	Development	C-28
Intersection Records	Public Works	C-43
Inventory	Finance	C-29
Inventory, Equipment Parts & Supplies	Transportation	C-47
Inventory, Equipment & Supplies	Public Safety	C-32&C-33
Inventory, Equipment - Parks	Public Works	C-42
Inventory, Equipment - Water	Public Works	C-45
Inventory, Information Systems	Administration	C-22
Inventory, Records	Administration	C-23
Inventory, Traffic Control Device	Public Works	C-43
Inventory, Vehicle Ownership and Title	Transportation	C-47
Investigations - Background	Public Safety	C-40
Investigations - Background Hired	Public Safety	C-40
Investigations - Notifications	Public Safety	C-34
Investigations, Evidence Arson - Administration	Public Safety	C-32
Investigations, Evidence Arson - Reports	Public Safety	C-33
Investment Transactions	Finance	C-30
Invoices	Finance	C-29
Jail - Daily Logs	Public Safety	C-35
Jail - Inmate Record	Public Safety	C-35
Jail - Inspection Files	Public Safety	C-35
Jail - Surveys	Public Safety	C-35
Journals - Utility Billing	Finance	C-29
Journals, Fire Station	Public Safety	C-32
Labor Distribution	Finance	C-30
Land Uses, non-conforming	Development	C-25
Landscape - Parks	Public Works	C-42
Landscaping - Streets/Alleys	Public Works	C-43

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**INDEX**

<b>ITEM</b>	<b>CATEGORY</b>	<b>PAGE</b>
Ledger, General - Voucher	Finance	C-29
Legal Advertising	Administration	C-23
Licenses - Bicycle	Public Safety	C-35
Licenses - Bingo, Mace	Public Safety	C-35
Licenses - Business License Review Board Administrative Files	Public Safety	C-35
Licenses - Duplicate (Pink), Secondhand Dealer, Pawn Brokers	Public Safety	C-35
Licenses, Permits	Transportation	C-47
Liens & Releases - Recorded	Development	C-26
Liens & Releases - Supporting	Development	C-26
Lighting	Public Works	C-43
Lobbyist Registration	Administration	C-18
Locations	Public Works	C-45
Logs	Development	C-27
Logs - Administration	Development	C-25
Logs - Auto Theft	Public Safety	C-35
Logs - Case Assignment	Public Safety	C-35
Logs - Code Enforcement	Development	C-27
Logs - Daily, Activity	Public Safety	C-35
Logs - Daily, Officer	Public Safety	C-35
Logs - Daily, Report Summary	Public Safety	C-35
Logs - Investigative (Pre-Arrest)	Public Safety	C-35
Logs - Juvenile Detention	Public Safety	C-35
Logs - Property Control	Public Safety	C-35
Logs - Rap Sheet	Public Safety	C-35
Logs - Subpoena	Public Safety	C-35
Logs, Attorney Service Request	Administration	C-23
Logs, Fire Equipment/Gear	Public Safety	C-32
Lot Split Cases	Development	C-28
Maintenance and Operations	Transportation	C-47
Maintenance and Operations - Municipal Facilities	Development	C-28
Maintenance and Operations - Parks	Public Works	C-42
Maintenance and Operations - Sanitation/Solid Waste/Wastewater	Public Works	C-42
Maintenance and Operations - Service	Public Works	C-45
Maintenance and Operations - Streets/Alleys	Public Works	C-43
Maintenance and Operations - Well & Pumping	Public Works	C-45
Maintenance, FAA	Transportation	C-47
Management Reports	Administration	C-24
Maps & Plats	Development	C-26
Maps - Parks	Public Works	C-42
Maps - Streets/Alleys	Public Works	C-43
Maps - Water	Public Works	C-45
Maps, City Boundary	Development	C-28
Maps, Plans, Drawings, Exhibits, Photos	Development	C-28
Maps, Precincts/Voter Information	Administration	C-18
Maps, Septic Tank	Public Works	C-42
Master Plans - Streets/Alleys	Public Works	C-43
Master Plans - Water	Public Works	C-45
Master Plans, Annual	Development	C-26
Media Relations	Administration	C-24

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**INDEX**

<b>ITEM</b>	<b>CATEGORY</b>	<b>PAGE</b>
Medical Leave	Administration	C-20
Medical - Personnel	Public Safety	C-32
Meter Operations	Public Works	C-45
Meter Reading	Finance	C-30
Minutes	Administration	C-23
Minutes, Board	Public Works	C-42
Motor Vehicle Pulls (DMV)	Administration	C-20
Municipal Code	Administration	C-23
Mutual Aid, Strategic Plans	Public Safety	C-32
Negotiation	Administration	C-20
Network Information Systems (LAN/WAN)	Administration	C-22
Nomination Papers	Administration	C-18
Non-Criminal Occurrences	Public Safety	C-36
Non-Safety Employees	Administration	C-21
Notices, Meeting	Administration	C-23
Notifications and Publications	Administration	C-18
Oaths of Office	Administration	C-18
Opinions	Administration	C-23
Ordinances	Administration	C-23
Parades & Special Events File	Public Safety	C-40
Parking - Lots	Public Works	C-43
Parking - Regulations	Public Works	C-43
Patrol Requests (Correspondence)	Public Safety	C-39
Pawn Slips/Tickets	Public Safety	C-35
Permits - Alcoholic Beverage Control License	Public Safety	C-40
Permits - Concealed Weapons	Public Safety	C-40
Permits - National Pollutant Discharge Elimination System (NPDES)	Public Works	C-45
Permits - Others	Development	C-26
Permits	Public Works	C-43
Permits, Construction	Development	C-26
Permits, Encroachment	Public Works	C-43
Permits, Hazardous Materials Storage	Public Safety	C-33
Permits, Improvement	Public Works	C-43
Permits, Other	Development	C-26
Permits, Oversize Load	Public Works	C-43
Permits, Parking	Public Works	C-43
Permits, Paving	Public Works	C-43
Permits, Uniform Fire Code	Public Safety	C-32
Permits, Use (Temporary)	Public Works	C-43
PERS Employee Deduction Reports	Finance	C-30
PERS, Social Security, SSI	Administration	C-21
Personnel Records (copies)	Administration	C-21
Pest Control	Development	C-27
Petitions - Elections	Administration	C-18
Petitions- Legal/Legislative	Administration	C-23
Photographs - Daily Report (Negatives)	Public Safety	C-35
Photographs - Inmates (Negatives)	Public Safety	C-35
Photographs - Negative Log	Public Safety	C-40
Photographs - Negatives, Misc.	Public Safety	C-40
Photographs - Personnel	Public Safety	C-40

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**INDEX**

<b>ITEM</b>	<b>CATEGORY</b>	<b>PAGE</b>
Photographs	Development	C-26
Photographs - Parks	Public Works	C-42
Photographs - Streets/Alleys	Public Works	C-43
Photographs, Negatives, Film	Administration	C-24
Plans, Capital Improvement, Projects	Public Works	C-43
Plans, Proposed	Public Works	C-42
Policies & Procedures, Departmental	Administration	C-19
Policies and Procedures - Naming and numbering	Public Works	C-43
Policies and Procedures - Speed Limits	Public Works	C-44
Policies and Procedures - Parks	Public Works	C-42
Policies and Procedures - Water	Public Works	C-45
Policy, Council/Proclamations	Administration	C-23
Precinct Records	Administration	C-19
Press Releases	Public Safety	C-40
Press, Video Programs (Community Relations)	Public Safety	C-40
Program Files and Directories	Administration	C-22
Programs - Federal Aid Urban	Public Works	C-44
Programs - Traffic Safety	Public Works	C-44
Programs	Development	C-27
Programs, Household Hazardous Waste	Public Safety	C-33
Projects, Not Completed or Denied	Development	C-26
Promotional Marketing -- External, Internal	Administration	C-19
Property Files	Public Safety	C-40
Property Original	Public Safety	C-37
Property, Pawn Broker/Secondhand	Public Safety	C-40
Public Records Request	Administration	C-23
Radar Calibration Records	Public Safety	C-39
Railroad Right-of-way	Public Works	C-42
Range Inventory	Public Safety	C-37
Rates - Sanitation/Solid Waste/Wastewater	Public Works	C-42
Rates - Water	Public Works	C-45
Reclamation	Public Works	C-45
Records Management Disposition Certification	Administration	C-23
Records Management	Administration	C-23
Records Retention Schedule	Administration	C-23
Recruitment	Administration	C-21
Recycling Programs	Public Works	C-42
Redevelopment	Development	C-28
Register	Finance	C-30
Registers, Transient Vessel Reservation	Transportation	C-48
Registration Files, Arson, Sex and Narcotics	Public Safety	C-36
Regulations	Development	C-27
Regulations	Public Works	C-42
Relocation Files	Development	C-28
Report, Accident (Copies)	Transportation	C-48
Reports - Accident and Incident (Aircraft)	Transportation	C-48
Reports - Accident	Public Safety	C-39
Reports - Accident	Public Works	C-42
Reports - Activity	Public Safety	C-33
Reports - Airport Operational (Administrative)	Transportation	C-47
Reports - Airport Operational (Regulatory)	Transportation	C-47
Reports - Audit	Administration	C-17

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**INDEX**

<b>ITEM</b>	<b>CATEGORY</b>	<b>PAGE</b>
Reports - Bridges & Overpasses	Public Works	C-44
Reports - Chemical Emissions	Public Safety	C-33
Reports - Conservation	Public Works	C-45
Reports - Consumption	Public Works	C-45
Reports - Corrosion Control	Public Works	C-45
Reports - Dealer of Gun Sales, Duplicate	Public Safety	C-40
Reports - Departmental	Administration	C-19
Reports - Discharge Monitoring	Public Works	C-45
Reports - Drinking Water Corrections	Public Works	C-45
Reports - Federal and State Tax	Finance	C-30
Reports - Human Resources	Administration	C-21
Reports - Hydrograph	Public Works	C-45
Reports - Inspection	Public Works	C-44
Reports - Lead Service Line	Public Works	C-45
Reports - NOTAM (Notice to Airmen)	Transportation	C-48
Reports - Others	Public Works	C-42
Reports - Public Education	Public Works	C-46
Reports - Quality Parameters	Public Works	C-46
Reports - Sanitary Surveys	Public Works	C-46
Reports - Source Water	Public Works	C-46
Reports - Staff	Administration	C-19
Reports - State Certification	Public Works	C-46
Reports - Studies (Sanitation/Solid Waste/Wastewater)	Public Works	C-42
Reports - Studies	Public Works	C-42
Reports - Studies	Public Works	C-43
Reports - Survey Response Files	Public Safety	C-33
Reports - Tonnage	Public Works	C-42
Reports - Traffic Collision Fatalities	Public Safety	C-39
Reports - Traffic Count	Public Works	C-44
Reports - Variances, Water System	Public Works	C-46
Reports - Vehicle Accident	Public Works	C-44
Reports - Well Level	Public Works	C-46
Reports	Development	C-26
Reports	Public Safety	C-37
Reports, Federal and State - Code Enforcement	Development	C-27
Reports/Studies	Public Works	C-43
Requisitions - Purchase Orders	Finance	C-40
Requisitions - Stores	Finance	C-40
Research Project Files	Public Safety	C-37
Resolutions	Administration	C-23
Resolutions, Board	Public Works	C-42
Restraining Orders, Emergency Protective Orders, Temporary Restraining Orders, Legal Stipulations, Orders After Hearing	Public Safety	C-40
Reviews, Internal/External Periodic	Administration	C-17
Risk Management Reports	Administration	C-24
Roster of Voters	Administration	C-19
Rosters (Divisional)	Public Safety	C-40
Routes, School Bus & Truck	Public Works	C-44
Safety Employees	Administration	C-21
Salary Records	Finance	C-30

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

## INDEX

ITEM	CATEGORY	PAGE
Schedules - Daily	Public Safety	C-40
Schedules - Municipal Clerk	Administration	C-23
Schedules - Watch Assignment/Timekeeping Records	Public Safety	C-40
Schedules, Class & Events	Public Works	C-42
Sealed - Adult Found Factually Innocent	Public Safety	C-38
Sealed - Juvenile	Public Safety	C-38
Seismic Retrofit Program	Development	C-26
Signage	Public Works	C-44
Signs (Temporary)	Development	C-26
Slip Rental Index	Transportation	C-48
Slip Rental Permits	Transportation	C-48
Slip Rental Waiting List	Transportation	C-48
Soil	Development	C-27
Soil Reports	Development	C-27
Sources	Public Works	C-46
Speaker Requests	Public Safety	C-40
Special Districts	Development	C-27
Special Projects	Administration	C-19
State Controller	Finance	C-30
Statistical (Crime Analysis)	Public Safety	C-37
Statistical (UCR), Uniform Crime Reports	Public Safety	C-37
Street Names and House Numbers	Development	C-26
Street/Alley (Abandonment/ Vacation)	Development	C-27
Studies, Special Projects & Areas	Development	C-26
Subpoenas (Duplicate)	Public Safety	C-38
Support Services	Administration	C-19
Surplus Property - Auction	Finance	C-29
Surplus Property - Disposal	Finance	C-29
Surveyor Field Notes	Public Works	C-46
Surveys	Development	C-26
Surveys and Studies	Administration	C-21
Surveys, Water System Sanitary	Public Works	C-46
Tapes - Audio, Telephone and Radio Communications	Public Safety	C-38
Tapes - Audio, Video	Administration	C-23
Tapes - Surveillance/Security Video (Jail)	Public Safety	C-38
Tapes Information Systems	Administration	C-22
Taxes Receivable	Finance	C-29
Tests - Bacteriological Analysis	Public Works	C-46
Tests - Chemical Analysis	Public Works	C-46
Tests - Quality	Public Works	C-46
Tests, Densitometer Results (Photo Lab)	Public Safety	C-40
Traffic Signals	Development	C-27
Traffic Signals	Public Works	C-44
Training - Bulletins	Public Safety	C-41
Training - Event Files	Public Safety	C-41
Training - Lesson Plans, Range	Public Safety	C-41
Training Materials	Public Safety	C-33
Training - Personnel	Public Safety	C-32
Training - Personnel (by name)	Public Safety	C-41
Training - Schedules, Range	Public Safety	C-41
Training Records - Non-Safety	Administration	C-21
Training Records - Personnel (by name)	Administration	C-21

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**INDEX**

<b>ITEM</b>	<b>CATEGORY</b>	<b>PAGE</b>
Training Records - Safety	Administration	C-21
Travel Records	Administration	C-19
Underground	Public Works	C-44
Underground Storage Tank - Maintenance and Operations	Public Safety	C-33
Underground Storage Tank - Compliance	Public Safety	C-33
Unsuccessful Grants	Administration	C-19
Use of Force Supervisory Review Files	Public Safety	C-38
Utility Rebates	Finance	C-30
Valve Main Records	Public Works	C-46
Vehicle Assignment	Transportation	C-47
Vehicle Ownership & Title	Finance	C-29
Vehicle - Assignment Reports	Public Safety	C-39
Vehicle - Down Reports	Public Safety	C-39
Vehicle Mileage Reimbursement Rates	Administration	C-21
Vehicle - Repossession/Private Impounds	Public Safety	C-39
Vehicle - Service Schedules	Public Safety	C-39
Vendor Register	Finance	C-30
Vests, Bulletproof Letters	Public Safety	C-39
Violations, Drinking Water	Public Works	C-46
Violations, Building, Property & Zoning	Development	C-27
Volunteer Card Files	Public Safety	C-41
Voter Affidavits	Administration	C-19
Voter Registration Signature Copy	Administration	C-19
Warrant Register	Finance	C-29
Warrants - Felony	Public Safety	C-38
Warrants - Misdemeanor Criminal	Public Safety	C-38
Warrants - Parking	Public Safety	C-39
Warrants - Served	Public Safety	C-38
Warrants - Traffic	Public Safety	C-39
Warrants - Unserved (Local)	Public Safety	C-38
Weapons, Database	Public Safety	C-39
Weed Abatement	Public Safety	C-33
Weigh Scales	Public Works	C-44
Workers Compensation	Administration	C-24



**LEGEND**  
Records Retention

<b>AC = Active</b>	<b>AD = Adoption</b>
<b>AU = Audit</b>	<b>CL = Closed/Completion</b>
<b>CU = Current Year</b>	<b>DOB = Date of Birth</b>
<b>E = Election</b>	<b>L = Life</b>
<b>P = Permanent</b>	<b>S = Supersede</b>
<b>T = Termination</b>	

**CITATIONS**

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

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**ADMINISTRATION**

Record Series	Retention	Citation	Descriptor
<b>AUDIT</b>			
Annual Financial Report	CL + 2	GC34090	Independent auditor analysis
Bonds	CL + 10	GC34090; CCP 337.5	Final bond documentation
Budget	P	GC34090	Annual operating budget approved by Legislative Body
Budget Operating (copies)	S	GC34090	Departmental Reference
Hearing or Review	AU + 2	GC34090; OMB A-128	Documentation created and or received in connection with an audit hearing or review
Reports	AU + 4	GC34090; OMB A-128	Internal and/or external
Reviews, Internal/External Periodic	CU	GC34090; GC6250	Daily, weekly, monthly, quarterly or other summary, review, evaluation, log, list, statistics, except a report
<b>COMMUNITY SERVICES</b>			
Libraries	CU + 2	GC 34090	Books, art, gifts, donations, exhibits, theatre, music, special events, etc.
Plaques	P		Historic value
Sports Organization	S + 2		
<b>ELECTIONS</b>			
Affidavit Index	CL + 5	EC 17001	
Applications, Absentee Ballots and Envelopes	E + .5	EC 17505; EC 17302	From date of election
Assisted, Challenged Voters List	E + .5	EC 17304	From date of election
Ballots	E + .5	EC 17302	From date of election; ballots submitted to precincts/City Clerk that were not used - unless contested (EC 17302(c)) retention by court order
Ballots Prop. 218 (Assessment Districts)	P	California Constitution Art. XIII	Property related fees (Assessment Ballot proceeding)
Calendar	E + 2	GC 34090	
Canvass	P	GC 22932; EC 17130; EC 2653	Notifications and Publication of Election; Records used to compile final election results, including tally sheets, voting machine tabulation, detailed breakdown of results; special election results
Certificates of Election	T + 4	GC 81009(a) (d)	Certificates of election; Original reports and statements
Charter Amendments/ Measures	P	GC34458-60; GC34090	Chapter designations by Secretary of State following adoption of voters

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

### ADMINISTRATION (CONTINUED)

Record Series	Retention	Citation	Descriptor
<b>Fair Political Practices</b>			
Administration/ Campaign Statements and Conflict of Interest	CU + 5		FPPC Opinions
Campaign disclosure, Elected	P	GC81009(b) (g)	FPPC Filings
Campaign disclosure, Not Elected	E + 5	GC81009(b)	FPPC Filings
Campaign disclosure - Unsuccessful (all other committees)	E + 7	GC81009	FPPC Filings
Candidate Statements	E + 4		Sample ballot retained permanently.
History	P	GC 34090	History of elections, sample ballots, certificates of destruction, other resolutions re: elections
Statement of economic interest - Elected Officials	T + 7	GC 81009(e)	FPPC Filings
Statement of economic interest - Not Elected	E + 5	GC 81009(b)	FPPC Filings
Lobbyist Registration	P	EC 81009(b)	Statements
Maps, Precincts/Voter Information	E + 2	GC 34090; EC 17501; EC 17301	
Nomination Papers Successful Unsuccessful	E + 4 E + 2	EC 17100 GC 81009(b)	
Notifications and Publications	E + 2	GC 34090	Proof of publication or posting, certification and listing of notice of posting; copy of newspaper notice and certification of offices to be voted for at forthcoming election
Oaths of Office	T + 6	GC34090; 29 USC 1113	Elected Officials
Petitions	.75	EC 17200, 17400; GC 7253.5; EC 14700 + GC 3756:8	From date of filing or election; Initiative, referendum, recall, Charter Amendments

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**ADMINISTRATION (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Precinct Records	E + .5	EC 17503	From date of election: Precinct official material; declaration of intention, precinct board member applications, orders appointing members of precinct boards and designating polling places Includes notice of appointment of office and record of service
Roster (Of Voters)	E + 5	EC 17300	From date of election; Initiative, referendum recall, general municipal election, Charter Amendments
Voter Affidavits	CL + 5	EC 17000	
Voter Registration Signature Copy	CU + 5	EC 17000	Fire, special or school district
<b>GENERAL SUBJECT</b>			
Administration	P	GC 34090	
Biographies	CU + 2	GC34090	
Classifications and Appointments	P	GC 34090; GC 12946; 29 CFR 516.6(2); 29 CFR 1602.4	Includes supplemental Personnel records. Wage rate tables 2 years.
Correspondence/ Originating Department	CU + 2	GC34090(d)	If not attached to agreement or project file
Goals & Objectives	CU + 2	GC34090	Departmental goals & objectives
Policies & Procedures, Departmental	S + 5	GC34090(d)	Retain while current
Promotional Marketing			
External	CU + 7		
Internal	2		
Reports			
Departmental	CU + 2	GC34090	Special/or final summary, review or evaluation
Staff	CU + 2	GC34090	Non-agenda related, includes supporting documentation
Special Projects	CU + 2	GC34090	
Support Services	CU + 2	GC34090	Reproduction; printing; postal/mailing services, other internal resources
Travel Records	CU + 2	GC34090	
<b>GRANTS</b>			
Community Development Block Grant and Urban Development	T + 4	GC34090; 24 CFR 570.502 24 CFR85.42*	Applications, reports, contracts, supporting documents; *OMB Cir. A-102, A-110, A-128
Federal and State	CL + 5	GC34090	Refer to grant application close-out procedure
Financial Records	CL + 5	GC34090	Refer to grant application close-out procedure
Unsuccessful	CL + 2	GC34090	Applications not entitled

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**ADMINISTRATION (CONTINUED)**

Record Series	Retention	Citation	Descriptor
<b>HUMAN RESOURCES</b>			
Benefit Plan Claims	P	GC6250 et seq; OMB A-129 29 CFR 1602.30; 32; Lab Rel Sec 1174*	May include dental, disability, education, health, life and vision including dependent care and Employee Assistance *29 CFR 1637.3; 29 USC 1027; 29 CFR 1627.3; 29 USC 1113
Benefit Plan Enrollment, Denied	CL + 4	GC34090; OMB A-128	
Bond, Personnel Fidelity	T + 2	GC34090	Employee Fidelity Bonds
Employee Handbook	S + 2	GC 34090	General employee information including benefit plans
Employee Programs	CL + 2	GC 34090; GC 12946	Includes EAP and Recognition
Employee Rights General Employees Safety (Police)	T + 2 T + 5	GC12946; 29 CFR 1602; 29 USC 211 (e); 203(m); 207(g)	May include Arbitration, grievances, union requests, sexual harassment and Civil Rights, complaints, disciplinary actions
Hourly Employees	T + 6	GC12946; GC34090*	*29 CFR 1627.3, Labor Relations Section 1174
Immigrant		Immigration Reform/Control Act 1986 Pub. L 99-603	I-9's
Medical Leave	CL + 30	FMLA 1993 US OSHA; 29 CFR ; 1910.20*	May include Family leave; certifications; tests; W-4's; *29 CFR 1602.30.32; 49 CFR 193-9;
Motor Vehicle Pulls (DMV)	CL + 7	GC12946, *	*CA 91009; 8 USC 1324 (a)
Negotiation	P	29 USC Sections 211(c), 203(m), 207(g)	Notes, notebooks, correspondence, contracts, and Memorandums of Agreements

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**ADMINISTRATION (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Non-Safety Employees	T + 3	Reference: 29 CFR 1627.3; CCR Sec 1174; 29 CFR 1602.30.32; GC6250 et seq; 29 CFR; GC 12946, 34090*	Non-safety employees may include: Release Authorizations; Certifications; Reassignments; outside employment; commendations disciplinary actions; terminations; Oaths of Office; evaluations-pre-employee medicals; fingerprints; identification cards (ID=s) *1607.4; 29 CFR 655.202; 29 CFR 516.6 et seq; 45 CFR 1068.6(a)
Personnel Records (copies)	CU + 2	GC34090; GC6250	Attendance; evaluations; drafts; worksheets; postings
PERS, Social Security, SSI	P	29 CFR 1627.3(2); GC 12946, 34090	EEOC/ADEA
Recruitment	CL + 3	Reference: GC12946; GC6250 et seq; 29 CFR 1602 et seq 29 CFR 1607; 29CFR 1627.3	Applications, resumes, alternate lists/logs, indices; ethnicity disclosures; examination materials; examination answer sheets, job bulletins; eligibility; electronic database
Reports	CU + 2	GC34090	Employee statistics, benefit activity; liability loss
Safety Employees	T + 5	Reference: 29 CFR 16273; CCR Sec 1174; 29 CFR 1607.4; *	Police, fire, emergency employees may include; Release Authorizations; Certifications Reassignments; outside employment; commendations disciplinary actions; terminations; Oaths of Office; evaluations-pre employee medicals *29 CFR 1602.30.32; 29 CFR 655.202; 29 CFR 516.6 et seq; 45 CFR 1068.6(a)
Surveys and Studies	CU + 2	GC 12946, 34090; 29 CFR 516.6(2); 29 CFR 1602.14	Includes classification, wage rates
Training Records Non-Safety	CU + 7	GC6250 et seq	Employee applications, volunteer program training, class training materials, internships;
Personnel (by name)	T + 7	GC34090	Paperwork documenting officers internal and external training
Safety	CU + 2	GC34090	Certifications/designations
Vehicle Mileage Reimbursement Rates	S + 2	GC 34090	Annual mileage reimbursement rates

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**ADMINISTRATION (CONTINUED)**

Record Series	Retention	Citation	Descriptor
<b>INFORMATION SERVICES</b>			
Internet, World Wide Web	S + 2	GC34090	Management/Policies and supporting documentation
Inventory, Information Systems	S + 2	GC34090	Hardware/Software Inventory logs; systems manuals
Network Information Systems (LAN/WAN)	CU + 4	GC34090; CCP 337.2; 343	Configuration maps and plans
Program Files and Directories	CU + 2 CU + (2 mos.) CU + 1 CU + .5	GC34090; GC34090.7	Annual backup Daily backup  Monthly backup Weekly backup
Tapes Information Systems	CU + 2	GC34090	System Generation
<b>LEGAL/ LEGISLATIVE</b>			
Agendas	CU + 2	GC34090	Original agendas and special meeting notices, including certificates of posting, original summaries, original communications and action agendas for Council, Boards and Commissions
Agenda Reports (Master, Subject Files)	CU + 2	GC34090 (d)	Documentation received, created and/or submitted to Council
Appeals, Civil	CU + 3	CCP 583.320(a)(3); GC 34090	
Applications, Boards, Commissions, Committees	CL + 2	GC34090	Not selected
Applications, Boards, Commissions, Committees	T + 5	GC34090; GC40801	Selected
Articles of Incorporation	P	GC34090; CCP 337.2	
Case Log	CL + 7	CCP 337.2; 343	From Close of cases listed; Chronological listing of cases
Case Records - (High Profile)	P	GC6254	Significant cases which have importance/or set legal precedence. Includes logs, complaints, police reports, court orders, motions, notes, briefs
Case Records	CO + 7	42 USC s1983	Includes logs, complaints, police reports, court orders, motions, notes, briefs, closing statements (unless minors - 3 years after attaining 18)
Contracts and Agreements Excl. Capital Improvement	T + 5	CCP 337.2, 343; B&P7042.5; *	Includes leases, equipment, services or supplies *PU7685; 48 CFR:2; GC53066
Incl. Capital Improvement	P	2.08.110;*	Construction *GC37090a; 4004; H&S 19850
Index, Attorney Case	L	GC6254	Including notations on activities related to case

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**ADMINISTRATION (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Legal Advertising	CU + 4	CCP 343, 349 et seq.; GC 911.2; GC 34090	Includes public notices, legal publications
Logs, Attorney Service Request	CU + 2	GC34090	Service request, summaries of monthly requests
Minutes	P	GC34090(d) ; GC36814; GC40801	Official minutes and hearing proceedings of governing body or board, commission or committee
Notices, Meeting	CU + 2	GC 34090.7, 54960.1(c)( 1)	Special meetings
Opinions	S + 2	GC34090; GC6254	Confidential
Ordinances	P	GC34090(d) 40806	Charter amendments; municipal code
Petitions	CU + 1	GC50115; GC6253	Submitted to legislative bodies
Resolutions	P	GC34090(d) 40801	Legislative actions
Tapes, Audio/Video	CU + 3 mos.	GC 34090.7	When used for minute preparation and may have historical value.
<b>MUNICIPAL CLERK</b>			
Assessment Districts	P	GC 34090	Original documentation
Inventory, Records	CU + 2	GC34090; 80 OPS Atty. Gen. 106	Inventory of non-current or inactive records holdings and location, indices. Tapes may be recycled.
Municipal Code	P	GC 34090	Supplements included
Public Records Request	CL + 2	GC 34090	
Records Management	CL + 2	GC34090	Document includes retrieval, transfers - inactive
Records Management Disposition Certification	P	GC34090	Documentation of final disposition or records
Records Retention Schedules	S + 4	CCP 343	
<b>POLICIES/ PROCEDURES</b>			
General Administrative	S + 2	GC34090; 40801	All city policies and procedures
Policy, Council/ Proclamations	S + 2	GC34090	Policies, directives rendered by Council not assigned a resolution or ordinance number
<b>PUBLIC FINANCING AUTHORITY</b>			
Administration	P	GC 34090	



**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**ADMINISTRATION (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Financial Records	P	GC 34090, 40802, 53901	
Management Reports	2	GC 34090	
<b>PUBLIC INFORMATION</b>			
Brochures, publications, newsletter, bulletins	S + 2	GC 34090	
Calendar, City	CU + 2	GC 34090	
Media Relations	CU + 2	GC 34090	Includes cable, newspaper, radio, message boards, presentations.
<b>RISK MANAGEMENT</b>			
Accident Reports - City Assets	CL + 7	29 CFR 1904.2; 29; <sup>^</sup>	Reports and related records * CFR 1904.6
Bonds, Insurance	P	CCP 337.2; 343	Bonds and insurance policies insuring city property and other assets
Claims, Damage	CL + 5	GC34090; GC25105.5	Paid/Denied
Incident Reports	CL + 7	29 CFR 1904.2; 29 CFR 1904.6	Theft, arson, vandalism, property damage or similar occurrence (excluding fire/law enforcement)
Insurance, ACCEL JT Powers Agreement	P	GC34090	(Authority California Cities Excess Liability Insurance) B Accreditation/ MOU=s/agreement/agendas
Insurance, Certificates	P	GC34090	Insurance certificates filed separately from contracts, includes insurance filed by licensees
Insurance, Liability/Property	P	GC34090	May include liability, property, Certificates of Participation, deferred, use of facilities
Insurance, Workers Compensation	P	GC6410; 29 CFR 1910.20	Indemnity; PERS - working files - originals with Administrator
Photographs, Negatives, Film	CL + 2	GC34090	
Risk Management Reports	CL + 5	OMB 1220-0029; 29 CFR1904.4; GC 34090	Federal OSHA Forms; Loss Analysis Report; Safety Reports ; Actuarial Studies
Workers Compensation	P	CCR 14311; 15400.2; CA Labor Code 110-139.6	Claim Files, Reports, Incidents (working files) originals filed with Administrator

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**DEVELOPMENT**

Record Series	Retention	Citation	Descriptor
<b>ADMINISTRATION</b>			
Benchmark Data	CU + 2	GC34090d	Horizontal, vertical & control
Bids & Proposals (Unsuccessful)	CL + 2	GC34090d	
Bonds Development	CL + 10	CCP 337.5	Housing; Industrial Development
Security	CL + 2	GC34090	Documentation created and or received in connection with the performance of work/services for the city, or for parcel maps and subdivision work
Code Books	P	GC34090e	National Electrical Code, Uniform Building, Fire, Mechanical, Plumbing & Supplements
Contractor	CU + 2	GC34090d	Current listing
Correspondence	CU + 2	GC34090d	Working documentation
Development Conditions	L	GC34090	Mitigation measures; filed with case files
Development Agreements	P	CCP337, 337.1(a), 337.15; GC34090;4 8 CFR 4.703	Infrastructure contracts, franchises. Original maintained for 7 years.
Development Standards	P	GC34090a	Landscape mediums, parkway landscape development, public works construction
Drawings, Project Plan	CU + 2	GC34090d	Does not include those usually filed with case or project
Franchises	P	GC65864, 65869.5, 34090*	Including subdivision agreements, contracts for sale or purchase of property, cable, grant of easements and/pr involving construction of improvements *CCP 337.2, 343; AC16023
General Subject Files	CU + 2	GC34090d	Internal working files including correspondence
Grants, Community/Urban Development (includes CDBG)	CL + 4	24CFR 570.502(b) (3); 241CFR 85.42 & OMB Cir. A- 110, Attach. C; "	Project files, contracts, proposals, statements, reports, sub-recipient dockets, Environmental review, grant documents, applications, inventory, consolidated plan, etc. Includes Section 108 loan guarantee *OMB Cir. A-102 & 128, HUD regulations
Historic Preservation Inventory	2	GC34090d	Historic structures & landmarks
Incident Files	2	GC34090d	Emergency Call Outs
Land Uses, nonconforming	P	GC34090a	Building or site usage which does not conform to current standards
Logs	CU + 5		Logs, registers or similar records listing permits, certificates of occupancy issued; may include inspection, building activity, daily, plan check, utility

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**DEVELOPMENT(CONTINUED)**

Record Series	Retention	Citation	Descriptor
Maps & Plats	P	GC34090a	Engineering & field notes and profiles; cross-section of roads, streets, right-of-way, bridges; may include annexations, parks, tracts, block, storm drains, water easements, bench marks, trees, grading, landfill, fire hydrants, base maps, etc.
Master Plans, Annual	S + 2	GC34090	Special or long range program plan for municipalities -- coordination of services; strategic planning
Permits, Construction	P	GC34090a; H&S19850; 4003; 4004	Plans, building, signs, grading, encroachment, including blueprints and specifications
Permits, Other	CL + 2	GC34090d	Alterations, encroachment, excavations, road, street sidewalks & curb alterations, transportation, swimming pool drainage, temporary uses, etc.
Photographs	S + 2	GC34090d	Aerial photographs
Projects, Not Completed or Denied	CL + 2	GC34090d	Building, engineering, planning
Reports	CU + 2	GC34090	Activity, periodic
Seismic Retrofit Program	P	GC34090a	Includes Certificates of Compliance
Street Names and House Numbers	P	GC34090a	Street dedications, closings, address assignment/changes
Studies, Special Projects & Areas	CL + 2	GC34090d	Engineering, joint powers, noise, transportation
Surveys	P	GC34090a	Recording data and maps
<b>BUILDING</b>			
Blueprints, Specifications	CL + 2	GC34090d	Submitted by contractors with application for permit and builds for Certificate of Occupancy
Certificates	L	GC34090a	Compliance, elevation, occupancy which affect real property
Construction (Approved)	P	GC34090a; 4003; 4004; H&S 19850, 19853	New commercial and residential construction, tenant improvements room additions, spa, signs, block wall, remodel including security bonds
Inspection	CL + 2	GC34090d	Correspondence, fees, appeal requests, reports
Permits	P	GC34090a; H&S 19850; 4003;4004	Plans, building, signs, grading, encroachment permits
Signs (Temporary)	S + 2	GC34090d	Home occupations, off-premise signs
<b>CODE ENFORCEMENT</b>			
Abandoned Vehicles	CL + 2	GC34090d	
Case Files	CL + 2	GC34090d	Building, housing and mobile home code violation records including inspections; public nuisance rubbish and weed abatement, vehicle abatement, citations, massage parlor permits, general
Liens & Releases, Supporting Recorded	CL + 2 P	GC34090	Utilities, abatement, licenses

**LOCAL GOVERNMENT RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**DEVELOPMENT(CONTINUED)**

Record Series	Retention	Citation	Descriptor
Logs	CU + 2	GC34090d	Lien Recovery, citations, complaints
Regulations	S + 2	GC34090d	Includes rules
Reports, Federal and State	P	GC34090a	Code enforcement statistics; may contain records affecting title to real property or liens thereon
Violations, Building, Property & Zoning	CL + 2	GC34090d	Supporting code enforcement activity
<b>ENGINEERING</b>			
Capital Improvement Projects	CL + 10	CC337.15	Supporting documents including bidders list, specifications, reports, plans, work orders, schedules, etc.
Construction Tracking, Daily	P	CC337.15	Assesses value of real property
Drawings, Traffic Control Plan	P	GC34090a	Signs, signing & striping, road construction
Flood Control	CL + 2	GC34090d	Storm Drains
Special Districts	P	GC34090a	Supporting documents re: improvement, lighting, underground utility; bonds, taxes & construction
Street/Alley (Abandonment/ Vacation)	CL + 2	GC34090d	Relinquishment of rights and fee title
Traffic Signals	CL + 2	GC34090d	Counts, collisions, accidents
<b>ENVIRONMENTAL QUALITY</b>			
Air Quality (AQMD)	CU + 7	CCP 338(k); GC34090	Participants/voucher logs, Total Daily Mileage Survey (TDM); various local authorities; Commute Alternative
Asbestos	P	GC34090a	Documents abatement projects, public buildings
California Environmental Quality Act (CEQA)	P	GC34090a + CEQA Guidelines	Exemptions, Environmental Impact Report, Mitigation monitoring, negative declaration, notices of completion and determination, comments, statements of overriding considerations
Congestion Management	CU + 2	GC34090d	Ride sharing, trip reduction
Environmental Review	CL + 2	GC34090d	Correspondence, consultants, issues, conservation
Pest Control	CU + 2	GC34090d	Pesticide applications, inspections & sampling, documents
Soil	CL + 2	GC34090d	Analysis, construction recommendations
Soil Reports	P	GC34090d	Final Reports
<b>HOUSING</b>			
Bonds	CL + 4	CCP 337	Revenue Bond Documentation
Programs	CL + 3	24 CFR 570.502(b)(3); 24 CFR 85.42 & OMB Cir. A-110, #C	Includes comprehensive Housing Authority Strategy, Meeting Credit Certificate, Housing bond advisory, HOME, In-Lieu Housing Mitigation, Low/Moderate Housing, Rental Housing Assistance

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**DEVELOPMENT(CONTINUED)**

Record Series	Retention	Citation	Descriptor
Redevelopment Budgets	P	GC 34090, 40802, 53901	Includes annual audit
Bond Issues	P	GC43900 et seq.	
<b>MUNICIPAL FACILITY</b>			
Capital Improvements, Construction	P	2.083110; GC34090a; 4004; H&S 19850; GC34090a	Contains records re: Planning, design, construction, conversion or modification of local government-owned facilities, structures & systems
Facility Rentals/Use	CU + 2	GC34090	Permits, contracts, diagrams, schedules, insurance binders
Maintenance & Operations	CU + 2	GC34090d	Service requests, invoices, supporting documentation; buildings, equipment, field engineering, public facilities including work orders and graffiti removal
<b>PLANNING</b>			
Case files, Planning and Zoning	P	GC34909a; H&S 19850; 4003;4004	Pertains to real property. May include blueprints, drawings, maps, plans, reports, evaluations, correspondence, uses, permits, variances, studies, appeals, compliance certificates, lot line adjustments or other planning-related matters brought before legislative body
Certificates	L	GC34090	Retain during life of structure
Flood Records	CU + 2	GC34090	
General Plan and Elements	P	GC34090	Includes sphere of influence
General Plan Amendments			
Approved	CL + 2	GC34090	* GC50110
Denied	CU + 3	GC65103; *	
Interpretations	CU + 2	GC34090	
Maps, Plans, Drawings, Exhibits, Photos	P	GC34090; H&S 19850; GC34090.7	Zoning, tentative subdivision, parcel, land use map, aerial photos, specific plans
<b>PROPERTY</b>			
Abandonment	P	GC34090a	Buildings, Condemnation, Demolition
Acquisition/Disposition	CL + 10	GC34090a; GC6254	Supporting documents re: sale, purchase, exchange, lease or rental of property by City
Annexation Case Files	P	GC34090a	Reports, agreements, public notices
Appraisals	CL + 2	GC34090; GC6254(h)	Exempt until final acquisition or contract agreement obtained
Deeds & Promissory Notes	P	GC34090a *	* 24 CFR 570.502(b)(3); 24 CFR 8.42 & OMB Circ. SA-110
Maps, City Boundary	P	GC34090d	Recorded maps, surveys, monuments
Lot Split Cases	P	GC34090	
Relocation Files	CL + 2	GC34090	e.g., Redevelopment

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**FINANCE**

Record Series	Retention	Citation	Descriptor
<b>ACCOUNTING</b>			
Accounts Payable	AU + 4	GC34090	Invoices, check copies, supporting documents
Accounts Receivable	AU + 4	GC 34090	
Applications	CL + 2	GC34090	Utility connections, disconnects, registers, service
Assessment Districts	P	GC 34090	Collection information; Original documentation files with municipal clerk
Bank Reconciliation	AU + 5	GC34090; 26 CFR 16001-1	Statements, summaries for receipts, disbursements & reconciliation
Billing Records	AU + 2	GC34090	Customer name, service address, meter reading, usage, payments, applications/cancellations
Budget	AU + 2	GC 34090	
Budget adjustments, journal entries	AU + 2	GC34090	Account transfers
Checks	AU + 5	GC34090; CCP 337	Includes payroll, canceled & voided checks
Deposits, Receipts	AU + 4	GC 34090; CCP 337	Checks, coins, currency
Invoices	AU + 2	GC34090	Copies sent for fees owed, billing, related documents
Journals			
Utility Billing	CU + 2	GC34090	Billing including monthly activity
Ledger, General	P	GC34090; *	* CCP 337
Voucher	AU + 4	GC34090; CCP 337	Account postings with supporting documents
Taxes, Receivable	AU + 3	CCP338	
Warrant Register	AU + 2	GC 34090.7	
<b>ADMINISTRATIVE SERVICES</b>			
Budget Operating (copies)	S	GC34090	Departmental Reference
Budget, Proposed	CU + 2	GC34090	Presented to Council
Adopted	P	GC 34090	
<b>FIXED ASSETS</b>			
Inventory	AU + 4	GC34090; 26 CFR 301 65-1(F)	Reflects purchase date, cost, account number
Surplus Property			
Auction	AU + 2	GC34090	Listing of property
Disposal	AU + 4	GC34090; CCP 337	Sealed bid sales of equipment
Vehicle Ownership & Title	L	VC 9900 et seq.	Title transfers when vehicle sold
<b>LICENSE</b>			
Business	T + 4	GC34090; CCP 337	Paid & reports

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**FINANCE (CONTINUED)**

Record Series	Retention	Citation	Descriptor
<b>PAYROLL</b>			
Adjustments	AU + 4	GC 34090 29 CFR 516.5 -- 516.6	Audit purposes
Employee Time Sheets	AU + 6	GC34090; 29 CFR 516.2*	Signed by employee for audit & FEMA Reports *20 CFR 516.6(1); IRS Reg. 31.6001-1(e)(z); R&T 19530; LC 1174(d)
PERS Employee Deduction Reports	T + 4	GC34090; CAC 22- 1085-2	Record of deductions ( <i>PERS Public Employee Retirement System</i> ) *26CFR 31.6001-1;29 CFR 516.5, 516.6, LC 1174(d)
Register	P	GC34090; GC37207	Labor costs by employee & program
Salary Records	T + 3	GC34090; 29 CFR 516.2	Deduction authorization, beneficiary designations, unemployment claims, garnishments
<b>PURCHASING</b>			
Bids, RFQ's, RFP's Successful Unsuccessful	AU + 4 AU + 5 CU + 2	GC34090; CCP 337; *	Requests for Qualifications; Requests for Proposals regarding goods and services * GC 25105-1; GC 34090
Requisitions			
Purchase Orders	AU + 4	GC34090; CCP 337	Original documents
Stores	CU + 2	GC34090	Completed forms for ordering
Vendor Register	P	GC34090	Alpha vendor listing of purchase orders, invoices, account numbers and check date
<b>REPORTS</b>			
Audits	P	GC 34090	
Deferred Compensation	T + 5	GC34090; 26 CFR 16001- 1*	Records of employee contributions and city payments *29 CFR 1627.3(2)
Federal and State Tax	AU + 4	GC34090; 29USC 436 *	Forms 1096, 1099, W-4's and W-2's *26 CFR 31.6001.1-4; IRS REG 31.6001-1(e)(2);R&T 19530;29 CFR 516.5-516.6
Financial, Annual	AU + 7	GC 34090.7	
Investment Transactions	P	GC34090; CCP 337; GC 53607	Summary of transactions, inventory & earnings report
Labor Distribution	AU + 2	GC34090	Costs by employee & program
Meter Reading	CU + 2	GC34090	
State Controller	P	GC34090	Controller may destroy after 5 years
Utility Rebates	CU + 2	GC34090	
<b>TREASURER</b>			
Bank Statements	AU + 2	FC 3368, 30210; GC 43900 et seq.	Financing authority

**LOCAL GOVERNMENT – RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**FINANCE (CONTINUED)**

Record Series	Retention	Citation	Descriptor
<b>Bonds</b>			
Account Statements	CL + 10	GC34090; CCP 337.5	Monthly statement of transactions.
Administration	CL + 10	GC34090; CCP 337.5	Supporting documents
Bonds and Coupons	CL + 2	GC34090; 53921	Paid/canceled



**LOCAL GOVERNMENT RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC SAFETY**

Record Series	Retention	Citation	Descriptor
<b>EMERGENCY MANAGEMENT</b>			
Mutual Aid, Strategic Plans	S + 2	GC34090	
<b>FIRE SAFETY ADMINISTRATION</b>			
Books, Fire Code	S + 3	GC34090.7 CCP 340.5	Include OPS manuals
General Orders, Policies/Procedures	S + 2		
Inspections, Fire Prevention	CL + 3	UFC 103.34	Alarm/sprinkler systems, prevention efforts
Investigations, Evidence Arson	P	PC 799	Support prosecution resulting in homicide
Investigations, Evidence Arson	CL + 6	PC 800	Great bodily harm, inhabited structure or property
Journals, Fire Station	CU + 2	GC34090	Activities, personnel, engine company
Permits, Uniform Fire Code	CL + 2	GC34090	
<b>PERSONNEL</b>			
Exposure	T + 30	29 CFR 1910.1020	Sampling results, collection methodology, background
Exposure	T + 1	29 CFR 1910.1020	Laboratory reports and worksheets
Medical	T + 30	29 CFR 1910.1020	
Medical	T + 2	29 CFR 1910.1020; *	Employees less than one year *GC34090
Training	T + 2	GC34090	Certifications/designations
<b>PROPERTY</b>			
Apparatus/Vehicle	CU + 2	GC34090 CCP 340.5 *	Repair and Maintenance *8 CAL Code Reg. 3203 (b) (1)
Inventory, Equipment & Supplies	CU + 2	GC34090	
Logs, Fire Equipment/Gear	CU + 2	GC34090	
<b>REPORTS</b>			
Incident	CL + 3	GC34090 CCP338 *	Dispatch and daily logs *CCP 340.5
Field, Non-fire and Logs	CU + 2	GC34090	
Fire, Non-arson and Logs	CU + 2	GC34090	

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC SAFETY (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Investigations, Evidence Arson	CL + 3	PC 801; UFC 104.32	Structure
Weed Abatement	CL + 2	GC34090	Reports, assessments, resolutions, documentation
<b>HAZARDOUS MATERIALS</b>			
Hazardous Waste Disposal	CU + 10	CAL OSHA; 40 CFR 122.21	Documentation re handling and disposal of hazardous waste
Permits, Hazardous Materials Storage	CU + 2	GC34090	Departments consistently recommend permanent retention of environmentally sensitive materials.
Programs, Household Hazardous Waste	S + 2	GC34090	
Training Materials	S + 2	Cal Code *	Standards and Administration *Reg. 3204(d), et seq.
Underground Storage Tank Compliance Maintenance & Operation.	P CU + 2	GC34090a GC34090	Documents re: storage Location, installation, removal, remediation
<b>LAW ENFORCEMENT ADMINISTRATION</b>			
Accounting/Cash Reconciliation	CU + 2	GC34090	
Alarm Records	CU + 2	GC34090	
Claim Files	CL + 6	PC 832.5	Claim copy, correspondence, photographs, supporting documents relative to incidents involving the Police Department filed by citizens
Department Manual	S		Changes to manual are recorded in the General Orders (permanent)
Equipment Communication	T + 2	GC34090	Retained until termination of equipment use; Manuals, instructions, procedures
Inventory	S + 2	GC34090	Listing of equipment assigned to division, to whom it is assigned
Reports Activity	CU + 2	GC34090	Weekly/monthly/quarterly/ annual activity/statistical reports by division. Retain only one form for retention period
Chemical Emissions Survey	CU + 2	GC34090	
Response Files	CU + 2	GC34090	Surveys, responses, correspondence with other agencies requesting statistical data
<b>INVESTIGATIONS</b>			
Administrative/Internal	CL + 5	PC 832.5 EVC 1045 GC 12946 PC 801.5; 803(c) VC 2547	Initiated by citizens complaints or internally initiated; includes complaint, reports, findings

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC SAFETY (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Asset Forfeiture	CL + 2	GC34090	
Investigations/ Proceedings Case File			
Notifications	CU + 2	GC34090	To legal property owner prior to case filing that property is subject to asset forfeiture proceedings. If case is filed, notification becomes part of forfeiture case file.
Case Books, Investigative	CL + 2	GC34090	Retained by division until a case is suspended/closed; transfer to Records Division to be filed with associated Daily Report (DR) file
Case Files Homicide Investigator's File	P	PC 799	
Narcotics (No arrest, Narcotics Cases)	CL + 2	GC34090	Retained by division until no longer useful for investigative purposes
Officer Involved Shootings	CL + 25	GC34090	
Court Daily Schedule	CU + 1	GC34090.7	Printouts of daily court scheduling
Sign-In Logs	CU + 2	GC34090	Logs officers' names, time in/out for court appearances
Tracking System Records	CU + 2	GC34090	Database records subpoena number, officer name, case number, defendant name, district attorney name, court information disposition
Evidence, Disposition Forms			Attach to duplicate Property Report, file w/DR in Records Division
Fingerprint Applicants Files	T + 2	GC34090	Paperwork authorizing fingerprinting and background checks for city employment applicants and business license applicants
Inked/Palm Cards	AC + 20		Persons booked into detention facility; (Copies distributed to county, state, federal agencies)
Records Latents		Approp. PC Section	1) Retain for applicable case statute of limitation; 2) or until evidence in case is destroyed; Hard copy and digitized
Suspect, Adult/Juvenile	CL	Law Enforcement Management Guide by POST	Adults/juveniles suspected of a crime, taken for comparison. Destroy after original purpose achieved
Guns, Dealers Record of Sale	CU + 6	PC 12070	Applicants, Monthly Gun Audits, Applications Denied, Stolen (DOJ File)
Informant Files	T + 10		Legal notifications, identification information, payment information, activities information

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC SAFETY (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Jail Daily Logs	CU + 6	GC34090	Daily report of staffing, bookings/releases, transfers, transportation
Inmate Record			Dependent on facility's classification; see Laws and Guidelines for Local Detention Facilities by Board of Corrections (State of California)
Inspection Files	CL + 6		Inspections by various agencies
Surveys	CL + 2	GC34090	Prepared quarterly, forwarded to State Board of Corrections
Licenses Bicycle	CU + 2	GC34090	
Bingo, Mace	CU + 2	GC34090	
Business License Review Board Administrative Files	T + 1	GC34090	
Duplicate (Pink), Secondhand Dealer, Pawn Brokers	CU + 2	GC34090	Original to licensee, Blue duplicate to DOJ; Pink duplicate retained by agency; renewals issued annually by local agency
Logs Auto Theft	S		
Case Assignment	CU + 1		
Daily Activity Officer	CU + 2	GC34090	
Report Summary	CU + 2	GC34090	Daily activity of incidents not reported by use of official report
Investigative (Pre-Arrest)	CL + 10	GC34090	Report numbers, type, names, dates retained for research value
Juvenile Detention	CU + 2	GC34090	Retained by division until cases are suspended and closed
Property Control	CU + 2	GC34090	Logs document juvenile processing per CYA
Rap Sheet	CL + 2	GC34090	Logs items coming into and going out of property room
Subpoena	CU + 2	GC34090	Requests for criminal history
Pawn Slips/Tickets	CU + 3	B & P 21628	Subpoenas received/served daily
Photographs			Crime Scene, Registrant/Applicant, Photo file, Accident. Retain according to practical and functional association.
Daily Report (Negatives)	T	GC34090	Assigned DR number, retained as form of evidence, destroyed at same time evidence for associated case is destroyed
Inmates (Negatives)	CU + 20		By Prisoner number

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC SAFETY (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Registration Files, Arson, Sex and Narcotics	Life of registrant within jurisdiction		Fingerprint Card, photo, information also forwarded to DOJ
Arrest/Conviction H&S Section 11357 (b), (c), (d), (e) or H&S Section 11360 (b) violations (Occurring after January 1, 1996)	2 (Mandatory destruction from date of conviction or date of arrest with no conviction)	H&S 11361.5	Applicable to convictions occurring after January 1, 1996 or arrests not followed by a conviction occurring after January 1, 1996; Exception: H&S 11357(e), the record shall be retained until a juvenile offender attains the age of 18 years, then destroyed pursuant to 11361.5
Arrest/Conviction H&S Section 11357(b), (c), (d), (e) or H&S Section 11360 (b) violations (Occurring before January 1, 1996)	Man-datory Destruction (Upon notice from Department of Justice)	H&S 11361.5 (c)	Applicable to convictions occurring prior to January 1, 1996 or arrests not followed by a conviction occurring prior to January 1, 1996 for violations of H&S Code 11357, 11364, 11365 and 11550
Crime Felony Crimes With Or Without Arrests	See descriptor	PC 800 PC 801	Prosecution for an offense punishable by imprisonment in state prison for eight years or more must commence within 6 years after offense commission. Commencement of prosecution defined in PC 804. Exception: See PC 803 - Tolling/Extension of time periods; Appeals process and "Three Strikes" also considerations in assigning retention.
Misdemeanor/ Infractions	CL + 2	GC34090	No arrests, identifiable property or missing persons (See: Note 1)
Supplemental Felony Capital Crimes, Crimes Punishable by Death, Life Imprisonment	P	PC 799	No statutory limitation for prosecution. Includes Murder, kidnapping for ransom, treason, procuring execution by perjury, train wrecking, assault with a deadly weapon by a life-term prisoner, bombing resulting in death or bodily injury, making defective war materials that cause death
Destruction Guns	P		
Narcotics	P		
Disposition of Arrest/Court Action			Retention determined by action taken; i.e., recordable arrest or detention (released no arrest)
False Alarm (Duplicate)	CU + 2	GC34090	
Non-Criminal Occurrences	CU + 2	GC34090	Injured or sick persons; missing persons where person has been returned; traffic collision reports not used as the basis for criminal charges

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC SAFETY (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Property Original	Until case is adjudicated/disposition determined		Copy retained in records case file; Refer to Managing Property in Law Enforcement Agencies (By POST)
Range Inventory	S + 2	GC34090	Quarterly reports of inventories of weapons and ammunition held by Department Range
Reports	CU + 2	GC34090	Arrest & Citation Register; Arson Offenses; Crimes Against Senior Citizens; Death in Custody; Domestic Violence; FBI Include Return A/Supp; Hate Crime Incidents; Homicide Reports, Supp.; Officers Killed or Assaulted; Original to FBI - DOJ; Uniform Crime Reports
Statistical (Crime Analysis)	CU + 2	GC34090	Internally generated information using activity logs, citizen calls, current and past crime statistic reports, finance dept expenditure and budget records; citations, crime reports, accident reports, permits, receipts. Reports created for variety of purposes including increases/decreases in criminal activity; officer workload, deployment, time usage
Statistical (UCR), Uniform Crime Reports Mandatory to DOJ (LEIC); FBI Include Return A/Supplement; Supplementary Homicide Report; Law Enforcement Officers Killed or Assaulted; Monthly Return of Arson Offenses Know to Law Enforcement; Number of Violent Crimes Committed Against Senior Citizens; Monthly Report of Domestic violence Related Calls for Assistance; Monthly Arrest and Citation Register; Monthly Hate Crimes Incidents; Death In Custody Reporting.	CU + 2	GC34090	Originals sent to FBI, DOJ
Research Project Files	CL + 2	GC34090	May include request forms, background materials, staff reports, final project reports and supporting data

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC SAFETY (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Sealed Adult Found Factually Innocent	Manda-tory Destruc-tion Upon and Pursu- ant to Court Order	PC 851.8	General provision: Upon petition, records of agency must be sealed and destroyed in accordance with the provisions set by court record; exceptions.
Juvenile	Manda-tory Destruc-tion upon and pursu- ant to court order	WIC 826 (a) & (b) WIC 781 (a)	Upon petition, local laws enforcement records within WIC 826(b) may be destroyed as ordered by the court, if related probation and juvenile court records have been destroyed by the probation officer. Records involving arrests, detention and/or petitioning juvenile before juvenile court
Subpoenas (Duplicate)	CU + 2	GC34090	
Tapes Audio, Telephone and Radio Communications	CU + 180 days	GC34090.6	Exception: Recordings used as evidence in a criminal prosecution or claim filed or litigation or potential claims and litigation shall be preserved for 100 days after conclusion of the court action
Surveillance/Se curity Video (Jail)	CU + 13 mos.	GC34090.6	
Use of Force Supervisory Review Files	CU + 2	GC34090	Includes review forms, arrest report copies, logs
Warrants Felony	Recall after 10 years. Excep-tion: Murder/ Escape		Recommended by the California Law Enforcement Warrant Officer's Association
Misdemeanor Criminal	Recall after 5 years		Recommended by the California Law Enforcement Warrant Officer's Association
Served	CU		Includes Warrant Service Information Card, alpha index card
Unserved (Local)	Until served, recalled or purged		
<b>PATROL</b>			
Cards Dispatch	CU + 2	GC34090	
Field Interview	CL + 2	GC34090	
Citations 11357(e), Juvenile	CL + 2	11361.5 H&S	
11357b H&S, 11357c H&S, 11360b H&S Violations	CL + 2	11361.5 H&S*	*CA Admin Code, Chapter 1, Title II, Sec. 708
Cite and Release	CL + 2	GC34090	

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC SAFETY (CONTINUED)**

Record Series	Retention	Citation	Descriptor
California Vehicle Code Infractions (Duplicates)	CU + 90 days	GC34090	Original is forwarded to court.
Parking/Traffic, Duplicates	CU + 2	GC34090.7	Originals are forwarded to court after agency processing; includes citations electronically created
Transmittals	CU + 2	GC34090	Listing of citations forwarded to court, filed for reference
Equipment Radio Logs (Communication)	CU + 2	GC34090	Documents problems, malfunctions, resolution to provide equipment performance history
General Orders	P		
Patrol Requests (Correspondence)	CU + 2	GC34090	From citizens for patrol presence
Radar Calibration Records	T + 2	GC34090	Documentation of Radar instruments retained during use/ownership
Reports Accident	CL + 2	GC34090	Non-Jury
Traffic Collision Fatalities	P		
Vehicle Assignment Reports	S		Record of assignments
Down Reports	CU + 1		Printouts reporting which vehicles are down for repair, maintenance, etc.
Repossession/Private Impounds	CU + 2	GC34090	
Service Schedules	S	GC34090	
Vests, Bulletproof Letters	CU + 2	GC34090	Authorization to purchase
Warrants Parking	Recall after 1 year		Recommended by the California Law Enforcement Warrant Officer's Association
Traffic	Recall after 5 years		Recommended by the California Law Enforcement Warrant Officer's Association
Weapons; Database	P		Departmentally-owned weapons, personal weapons, alternate weapons, secondary handguns; produces inventory reports
<b>SERVICES</b>			
Chemicals/Film Inventories	S		
Equipment Inventory/Sign-out Cards- Photo Lab	T		
Operations Files - Photo Lab	T		Retain until equipment no longer owned/used by department; Manuals, instructions, procedures for use/operations of photographic equipment



**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC SAFETY (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Grievance Files	CL + 2	GC34090	Grievance filed by employees, supporting documentation
Investigations, Background	CL + 2	GC34090	Non hired
Background Hired	P		Include original reports re: PC 832.5 investigations
Parades & Special Events File	CL + 2	GC34090	Reports, memos, correspondence, scripts, supplier information, assignments, deployments, supporting documentation
Permits Alcoholic Beverage Control License	L + 2	GC34090	Approval process
Concealed Weapons	CL + 2	GC34090	
Photographs Personnel	S + 2	GC34090	
Negative Log	CU + 2	GC34090	
Negatives, Misc.	CU + 2	GC34090	Not case-related (Public relations, promotions, events, ceremonies, staff photos)
Press Releases	CU + 2	GC34090	
Press, Video Programs (Community Relations)	CU + 2	GC34090	Collection of videos of programs and events; outside press coverage of department
Property Files	CU + 2	GC34090	Original reports and supplemental documentation (Lost, Found, Safekeeping)
Property, Pawn Broker/Secondhand	CU + 2	GC34090	Sales, slips. Dealer required to file duplicate with agency
Reports Dealer of Gun Sales, Duplicate	CU + 6 mos.	GC34090.7	Original maintained by DOJ. Dealer required to file duplicate with agency
Restraining Orders, Emergency Protective Orders, Temporary Restraining Orders, Legal Stipulations, Orders After Hearing	CU (See descriptor)		Destroy after law enforcement actions described in PC 273.5, 273.6, 646.9, 12028.5, 13700 and Family Code Sections 6380-6383 are fulfilled and effective date of restraining order has expired.
Rosters (Divisional)	S + 2	GC34090	Personnel assigned to division.
Schedules Daily	CU + 2	GC34090	Schedules of Officers on duty
Watch Assignment/ Timekeeping Records	CU + 2	GC34090	
Speaker Requests	CU + 2	GC34090	Community and business requests for public appearances, speakers
Tests, Densitometer Results (Photo Lab)	T + 2	GC34090	Daily tests of development chemicals/processes for quality control.

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC SAFETY (CONTINUED)**

Record Series	Retention	Citation	Descriptor
Training Bulletins	P		
Event Files	CU + 2	GC34090	Correspondence, brochures, promotional materials, info on speakers, guests, supporting documents
Lesson Plans, Range	CL + 15		Scope, content, time period of courses
Personnel (by name)	T + 7	GC34090	Paperwork documenting officers' internal and external training
Schedules, Range	CU + 2	GC34090	Daily, weekly, monthly schedules of training events at range
Volunteer Card Files	T + 2	GC34090	Volunteers' identification, contact information

Note 1: The destruction of felony, misdemeanor and infraction Crime/Supplemental Reports is permitted providing:

1. They do not relate to an unadjudicated arrest except for H&S 11357 or H&S 11360 violations;
2. They do not relate to unserved warrants;
3. They do not involve identifiable items which have not been recovered;
4. They do not relate to PC 290, PC 457.1, or H&S 11590 registrants;
5. They do not relate to violations listed in PC Sections 799 and 800;
6. The cases are not presently involved in either a civil or criminal litigation.

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC WORKS**

Record Series	Retention	Citation	Descriptor
<b>PARKS</b>			
Agendas, Board	CU + 2	GC34090	
Grants (refer to Admin.)			
Inventory, Equipment	AU + 2	GC34090	Warranties, purchase orders
Landscape	CU + 2	GC34090	Drawings, contracts, complaints, specifications, photos, reports
Maintenance/ Operations	C + 2	GC34090	Includes work orders, inspection, repairs, cleaning, reports, complaints
Maps	P	GC34090	Irrigation, plot plans
Minutes, Board	P	GC34090	
Photographs	S + 2	GC34090	
Plans, Proposed	CU + 2	GC34090	Future plans, new sites, expansions
Policies and Procedures	S + 2	GC34090	Includes rules and regulations
Railroad Right-of-way	CL + 3	36 CFR 64.11	Land acquisitions, correspondence, improvements, statutory records
<b>Reports</b>			
Accident	CL + 2	GC34090	Patrons, employees
Others	CL + 2	GC34090	
Studies	CL + 2	GC34090	Future sites, expansions
Resolutions, Board	P	GC34090	
Schedules, Class & Events	CU + 2	GC34090	Enrollment, liability releases, evaluations, attendance, flyers
<b>SANITATION/ SOLID WASTE/ WASTEWATER</b>			
Collections/Landfill	CU + 2	GC34090	Daily records, usage
Facilities	CU + 2	GC34090	Correspondence, maps, patron list
History, Sanitation	P	GC34090	Where City-owned
Incineration Plants, Sludge	CU + 2	40 CFR 61.54	Sludge, sampling, charging rate to measure mercury content
Incinerator Operations, Treatment Plant	CU + 2	40 CFR 60.153	Gas flow through wet scrubbing, oxygen content of exhaust gas, sludge rate, temperatures, fuel flow, total solids and volatile solids
Maintenance and Operations	CU + 2	GC34090	Includes work orders, inspection, repairs, cleaning, reports, complaints
Maps, Septic Tank	P	GC34090	Location maps
Rates	CU + 2	GC34090	
Recycling Programs	S + 2	GC34090	
Regulations	S + 2	GC34090	Includes legislation
<b>Reports</b>			
Studies	CL + 2	GC34090	
Tonnage	CU + 2	GC34090	

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC WORKS (CONTINUES)**

Record Series	Retention	Citation	Descriptor
<b>STREETS/ALLEYS</b>			
Abandonment/ Vacations	P	GC34090	
Closures	P	GC34090	
Easements, Dedications, Rights-of- Way	P	GC34090	
Field Books	P	GC34090	
Grants (see Admin.)			
Intersection Records	CU + 2	GC34090	Includes correspondence, volume counts, accident history
Inventory, Traffic Control Device	S + 2	GC34090	Signs, lights
Landscaping	CU + 2	GC34090	Plants, tree maintenance, work orders
Lighting	CU + 2	GC34090	Maintenance, work orders
Maintenance/ Operations	CU + 2	GC34090	Includes work orders, inspection, repairs, cleaning, reports, complaints, signals, striping
Maps	P	GC34090	Fire hydrants, lighting districts, wheel chair ramps, storm drains, streets, sidewalks, sewers
Master Plans	CU + 2	GC34090	Copies
<b>Parking</b>			
Lots	CU + 2	GC34090	
Regulations	S + 2	GC34090	
Reports/Studies	CL + 2	GC34090	
<b>Permits</b>			
Encroachment	P	GC34090	
Improvement	CL + 2	GC34090	May include curbs, sidewalks; Applications for excavation, fill, alterations
Oversize Load	CL + 2	GC34090	
Parking	CL + 2	GC34090	Residential
Paving	CL + 2	GC34090	
Use (Temporary)	CU + 2	GC34090	Includes Special Events
Photographs	S + 2	GC34090	Includes aerials
Plans, Capital Improvement, Projects	P	GC34090	Streets, curbs, gutters, sidewalks, storm drains
Policies and Procedures	S + 2	GC34090	Includes rules, regulations, standards
Naming and numbering	P	GC34090	

**LOCAL GOVERNMENT RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC WORKS (CONTINUES)**

Record Series	Retention	Citation	Descriptor
Speed Limits	S + 2	GC34090	
<b>Programs</b>			
Federal Aid Urban	CL +	23 CFR 633 (a) & (c)	
Traffic Safety	S + 2	GC34090	Drivers Education, Pedestrian Safety, Bicycle Lanes
<b>Reports</b>			
Bridges & Overpasses	L	GC34090	Life of structure
Inspection	CU + 2	GC34090	Includes intersection, sidewalks. Bridges and Overpasses, keep life of structure
Studies	CL + 2	GC34090	Traffic volume, accident history, requests, statistics, drawings supporting traffic devices
Traffic Count	CL + 2	GC34090	Evaluation of traffic volume
Vehicle Accident	CL + 2	GC34090	
Routes, School Bus & Truck	S + 2	GC34090	Truck routes, access ramps, rest areas
Signage	L + 2	GC34090	Log books, index register cards, inventory lists, records of traffic signs
Traffic Signals	L		Logs, drawings, wiring diagrams, codes, circuit numbers, installation records, testing and maintenance.
Weigh Scales	S + 2	GC34090	
<b>UTILITIES</b>			
Facilities	T + 2	GC34090	If city owned
Gas & Electric Rates	S + 2	GC34090	
Underground	P	GC34090	GC4003, GC4004; H&S 19850
<b>WATER</b>			
Billing/Customer Records	CU + 2	GC34090	Billings, correspondence, complaints
Connection Records	P	GC34090	Maps, water line connections
<b>Flood Control</b>			
Drainage Facilities	P	GC34090	Includes dams, lakes, basins, creeks
Flood Zones	P	GC34090	Includes flood maps
Insurance Programs	S + 2	GC34090	Includes copies of policies, rules, programs

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC WORKS (CONTINUES)**

Record Series	Retention	Citation	Descriptor
Policies/ Procedures	S + 2	GC34090	Rules and Regulations
Reports/ Studies	CL + 2	GC34090	
Grants (see Admin.)			
Inventory, Equipment	CU + 2	GC34090	
Locations	P	GC34090	Mains, valves, hydrants, wells
Maintenance and Operations	CU + 2	GC34090	Includes work orders, inspection, repairs, cleaning, reports, complaints
Service	CU + 2	GC34090	Includes work orders, entry cards, manholes, service to property owners
Well & Pumping	CU + 2	GC34090	Times operational, power used and quantity
Maps	P	GC34090	Line location; easements
Master Plans	CU + 2	GC34090	Copies
Meter Operations	CU + 2	GC34090	Reader reports, orders, tests Maintenance Reports
Permits			
National Pollutant Discharge Elimination System NPDES)	P	40 CFR 122.28	Municipalities of 100,000/more, compliance with Clean Water Act re: pollutants
Others	CU + 2	GC34090	May depend on terms of state or federal agency
Policies and Procedures	S + 2	GC34090	Includes rules and regulations
Rates	S + 2	GC34090	
Reclamation	CU + 5	40 CFR 122.41	Daily operations including sewage flow, grit removal, chlorine usage, lab analysis results, etc.
Reports			
Conservation	CU + 2	GC34090	
Consumption	CU + 2	GC34090	
Corrosion Control	CU + 12	40 CFR 141.91	Compliance documentation
Discharge Monitoring	CU + 5	40 CFR 122.41	Average amount of pollution discharged into waters of municipality.
Drinking Water Corrections	CU + 10	40 CFR 141.33	
Hydrograph	P	GC34090	Daily flow of streams
Lead Service Line	CU + 12	40 CFR 141.91	Compliance documentation

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**PUBLIC WORKS (CONTINUES)**

Record Series	Retention	Citation	Descriptor
Public Education	CU + 12	40 CFR 141.91	Compliance documentation
Quality Parameters	CU + 12	40 CFR 141.91	Compliance documentation
Sanitary Surveys	CU + 10	40 CFR 141.33	Statistics, reports, correspondence
Source Water	CU + 12	40 CFR 141.91	Compliance documentation, e.g. lead & copper
State Certification	CU + 12	40 CFR 141.91	Compliance documentation
Variances, Water System	CU + 5	40 CFR 141.33	
Well Level	CU + 2	GC34090	
Sources	CU + 2	GC34090	May include wells, rivers, lakes, districts
Surveyor Field Notes	P	GC34090	Notes preparatory to maps of water installations
Surveys, Water System Sanitary	CU + 10	40 CFR 141.33	Statistics, reports, correspondence
Tests			
Bacteriological Analysis	CU + 5	40 CFR 141.33	Compliance records include location, date, method and results; corrections, analysis of bacterial content
Chemical Analysis	CU + 10	40 CFR 141.33	Compliance records include location, date, method used and results; corrections, analysis of chemical content
Quality	CU + 12	40 CFR 141.91	Compliance documentation including sampling data, analysis, reports, surveys, documents, evaluation, schedules, valves, etc.
Valve Main Records	P	GC34090	
Violations, Drinking Water	CU + 3	40 CFR 141.33	Retention applies to each violation

**LOCAL GOVERNMENT - RECORDS MANAGEMENT GUIDELINES ATTACHMENT C**

**TRANSPORTATION**

Record Series	Retention	Citation	Descriptor
<b>ADMINISTRATION</b>			
Agreements	T + 4	CCP 337	Including concessionaire, slip rental, facility storage
Applications Aircraft Storage Parking Slip Rentals	T + 2	GC34090	Payment invoices, inventory listings, billing correspondence and other related documents
Special Events	CU + 2	GC34090	Permits, correspondence, related documents re use of rights of way
Fueling	AU + 3	CCP 337	Meter readings, fuel consumption reports, invoices, receipts and records pertaining to refueling operations
Hazardous Waste Disposal	CU + 10	CAL OSHA; 40 CFR 122.21	Documentation re: the handling and disposal of hazardous waste
Inventory, Equipment Parts & Supplies	L + 2		Includes vehicles, aircraft, vessels and related documents re repairs
Inventory, Vehicle Ownership and Title	L + 2		Owners manual, warranty documents, Department of Motor Vehicle title and registration, and related documents
Licenses, Permits	CU + 2		Forms, related documentation re: licenses and permits required by federal and state agencies
Maintenance/ Operations	L + 2	GC34090	Related to requests for service and work orders for fuel, vehicle and equipment maintenance and repairs
Report, Accident (Copies)	CU + 2	GC34090	Memos and working documents
Vehicle Assignment	CU + 2	GC34090	Log books, request forms, lists
<b>AIRPORT</b>			
Airport Certification	P	14 CFR 139.207b & 171.13- 171.213	Federal Aviation Administration (FAA) required manuals
Airport Noise Monitoring and Complaint	CU + 10		Correspondence, studies, memos, reports, log books, documents related to assessment of noise levels at airports and resolution of complaints
Inspection, Runway	CU + 10		Maintenance including inspection reports, work orders and related records
Inspection, Safety Self	CU + 2	CFR 139.327	Safety inspection and related document include reviews and analysis of all aspects of airport operation
Maintenance, FAA	P	14 CFR 171.13 - 171.213	Forms and reports required by FAA including Forms FAA-198, -418, -6030-1, -6790-4



**TRANSPORTATION (CONTINUED)**

Record Series	Retention	Citation	Descriptor
<b>Reports</b>			
Accident and Incident (Aircraft)	CL + 8		Accidents, injuries, property damages, general conditions re pilot and aircraft
Airport Operational (Regulatory)	P		Annual and special reports to federal and state regulatory agencies.
Airport Operational (Administrative)	CU + 2		Logs, statistical summaries; administrative records
NOTAM (Notice to Airmen)	CU + 3		Reports re: conditions affecting airport maintenance/operations
<b>GROUND TRANSPORTATION</b>			
Auto for Hire	T + 4	GC34090	License, permits for Taxicabs, shuttles, etc
<b>HARBOR</b>			
Registers, Transient Vessel Reservation	AU + 3		Reservation applications, receipts, and index registers relating to boats in transit, temporarily moored
Slip Rental Index	CU + 5		Annual and periodic reports of slip renters
Slip Rental Permits	CL + 2		Applications, statement of rental conditions, vessel inspection check sheets, copy of DMV registration, boat owner information, and other documents re: dock slip spaces
Slip Rental Waiting List	CU + 2		



# LAKE SHASTINA COMMUNITY SERVICES DISTRICT

Regular Meeting  
Wednesday, April 16, 2014 – 5:00 p.m.  
Administration Building  
**MINUTES**

CALL TO ORDER AND ROLL CALL: called to order at 4:30 p.m.

LSCSD Board Roll Call: Cupp  Mitchell  Moller  Roths  Wetter

PUBLIC COMMENTS BEFORE CLOSED SESSION: None

CLOSED SESSION: called to order at 4:31 p.m.

Also present: GM McCarthy

1. A. Conference with Legal Counsel: Existing Litigation (Gov. Code Section 54956.9)  
James and Deborah Lea, APN 020-270-320, discussion regarding settlement

With no objections by the Board, Pres. Moller adjourned Closed Session at 4:50 p.m.

REGULAR MEETING: called to order at 5:00 p.m.

Also present: GM McCarthy, PWS Moser, SAC Nelle, CPS Wilson, AA Charvez  
There were approximately 35 people in the audience.

PLEDGE OF ALLEGIANCE: Pres. Moller led the Pledge of Allegiance.

REPORT ON CLOSED SESSION:

Items 1.A.: The Board received an update, no action taken.

PUBLIC COMMENTS: Jerry Bounds (SRA CalFire fee, Political Signs/CC&Rs, DPS monthly statistics)

CONSENT CALENDAR: (All items accepted/approved by the Board unless otherwise noted.)

2. A. Approval of Minutes: Regular Meeting March 19, 2014
- B. Ratification of Disbursements: March 1 to March 31, 2014
- C. Budget Comparison / Variance Report: FY 2013/2014 YTD
- D. Accounts Receivables Aging Analysis: FY 2013/2014 YTD
- E. Approval of CalPers Retirement Resolution 2-14
- F. General Manager Contract: third year option

**With no objection by the Board, Pres. Moller moved to approve Consent Calendar.**

**Ayes: Directors Cupp, Mitchell, Moller, Roths and Wetter**  
**Noes: None**  
**Absent: None**

PUBLIC HEARINGS:

3. Second Reading, Public Hearing and Adoption for proposed Ordinance 1-14 regarding special tax to fund Public Safety services and repealing existing special taxes for Police protection and Fire protection and emergency services and increasing the District's appropriations limit by the amount of the special taxes levied.

Pres. Moller opened the Public Hearing at 5:06 p.m. There were no comments from the audience. Public Hearing closed at 5:06 p.m.

**Motion by Dir. Mitchell second by Dir. Wetter to adopt Ordinance 1-14 regarding a special tax to fund Public Safety services and repealing existing special taxes for Police protection and Fire Protection and emergency services and increasing the District's appropriations limit by the amount of the special taxes levied.**

**Ayes: Directors Cupp, Mitchell, Moller, Roths and Wetter**  
**Noes: None**  
**Absent: None**

DISCUSSION / ACTION ITEMS:

4. Department of Public Safety Monthly Report: CPS Wilson updated the Board on Fire and Police activities.
5. Department of Public Safety – volunteer appreciation: CPS Wilson presented certificates to DPS volunteers; National Volunteer Week was April 6 – 12, 2014.
6. Wastewater Treatment Plant: GM McCarthy gave a PowerPoint presentation updated the Board on recent upgrades to the Wastewater Treatment Plant.

- 7. CSD Water Service – outside District Boundaries: The Board discussed that due to the current drought and water level of Lake Shastina, the city of Montague expects to run out of water this summer and is investigating options to resolve the situation, which includes buying water from the District. The District can lawfully sell water in bulk to customers outside the District on a contract basis.
- 8. Consideration of proposed resolution regarding retention and destruction of LSCSD records, documents and papers: GM McCarthy reviewed the proposed resolution.

**Motion by Dir. Cupp second by Dir. Wetter to adopt Resolution 3-14 regarding retention and destruction of District records, documents and papers.**

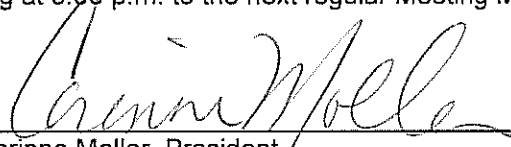
**Ayes: Directors Cupp, Mitchell, Moller, Roths and Wetter**  
**Noes: None**  
**Absent: None**


BOARD MEMBER COMMENTS: Dir. Roths (records retention), Dir. Cupp (College of the Siskiyous play "The Producers", LOLA meeting presentation, YMCA dinner), Dir. Mitchell (thanked all volunteers), Pres. Moller (thanked Supervisor Michael Kobseff for attending meeting), Dir. Wetter (LOLA meeting presentation, Foundation meeting, Easter Egg Hunt)

ADJOURNMENT:

With no objections by the Board, Pres. Moller adjourned the meeting at 5:55 p.m. to the next regular Meeting May 21, 2014 (Open Session at 5:00 p.m.).

Approval Date: 5/21/14

  
 \_\_\_\_\_  
 Corinne Moller, President

ATTEST   
 \_\_\_\_\_  
 John McCarthy, District Secretary