

RESOLUTION NO. 3602

**A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF MONTE SERENO
REVISING THE PUBLIC RECORDS RETENTION SCHEDULE**

WHEREAS, the destruction of certain public records is authorized by State Law in Government Code 34090, et seq; and

WHEREAS, the City of Monte Sereno previously adopted a formal policy for managing its public records which provided for the permanent retention of agreements and contracts; and

WHEREAS, because retention of the paper contracts and agreements is voluminous, inefficient for retrieval and paper does not withstand time, it is appropriate, more efficient and safer to retain an electronic copy of the contracts and agreements; and

WHEREAS, it is appropriate to amend the City Public Records Retention schedule to retain contracts and agreements for two years after the end of the term of the contract and 4 -7 years following the end of the contract term for contracts that may be subject to audit; and

WHEREAS, the City Council, by Resolution No. 1837 has appointed the City Clerk as Records Custodian, authorizing destruction of original records according to an established retention schedule.

NOW THEREFORE BE IT RESOLVED that the City Council of the City of Monte Sereno hereby adopts the Revised Records Retention Schedule dated October 6, 2015 and attached hereto as Exhibit A.

REGULARLY PASSED AND ADOPTED this 6th day of October, 2015, by the following roll call vote:

AYES: Council Members Allan, Anstandig, Craig and Mayor Huff
NOES: None
ABSENT: None
ABSTAIN: None

BY:


Walter Huff, Mayor

ATTEST:


ANDREA M. CHELEMENGOS, CITY CLERK

**RETENTION SCHEDULE
ADOPTED OCTOBER 6, 2015**

RECORD TITLE	RETENTION PERIOD	CAN MICROFILM COPIES REPLACE ORIGINALS?	COMMENTS
City Clerks Office			
Correspondence (General)	2 years	*	City Clerk Opinion
Ordinances	Permanent	No	GC34090
Record & Information Management Retention Schedules Destruction Lists	Permanent	No	
Resolutions	Permanent	No	GC34090
Weed Abatement File/Lists	10 years	Yes	
General Legal Documents			
Agreements/Contracts	2 years after expiration of contract term 4-7 years after expiration of contract term for contracts subject to audit	No	GC34090
Claims filed against/by the City	5 years (after settlement, denial, withdrawal)	No	GC34090
City Incorporation Documents	Permanent	No	
Deferred Improvement Agreements	Permanent	Yes 5 years after expiration of agreement	
Litigation	Permanent	No	
Solicitation Permits	2 years	*	
City Council			
• Agendas	5 years	Yes, after 2 years	GC34090
• Agenda Packets	5 years	Yes, after 2 years	City Clerk opinion
• Correspondence	5 years	Yes, after 2 years	City Clerk Opinion
• Note & File	5 years	Yes, after 2 years	City Clerk Opinion
• Minutes	Permanent	No	
• Proclamations/Commendations	2 years	*	City Clerks Opinion
• Tapes – City Council Mtgs.	5 years	N/A	

RECORD TITLE	RETENTION PERIOD	CAN MICROFILM COPIES REPLACE ORIGINALS?	COMMENTS
Elections			
• Successful Candidates Campaign Statements, Nomination Papers, etc	Permanent	Yes, after 2 years	GC 81009 (b)
• Unsuccessful Candidates Campaign Statements, Nomination Papers, etc	5 years	Yes	GC 81009
• Certificate of Election.	Permanent	No	
• Oaths of Office	Permanent	No	
Statement of Economic Interest			GC81009
Mayor, Council, Manager, Attorney, Treasurer	7 years	Yes, after 2 years	Govt. Code 81009(f) originals filed with FPPC & retained 7 years
Employees of the City	7years	Yes, after 2 years	
Finance/Personnel Department			
Accounts Payable *	7 years	Yes, after 2 years	Generally accepted practice
Accounts Receivable *	7 years	Yes, after 2 years	Generally accepted practice
Alarm Reports	7 years	Yes, after 2 years	
Audits	Permanent	No	
Bank Reconciliation	7 years	Yes, after 2 years	Generally accepted practice
Benefit Plan Info.	7 years	Yes, after 2 years	
Budgets	7 years	Yes, after 2 years	Generally accepted practice
Business License Applications	7 years	Yes, after 2 years	
Canceled Checks	7 years	Yes, after 2 years	Generally accepted practice
General Ledgers	Permanent	Yes, after 2 years	Generally accepted practice
Payroll Records W-2/W-3/Quarterly Reports	Permanent	Yes, after 2 years	
Personnel Files/Time Cards/Retirement Info	Permanent	Yes, after 2 years	
Receipt Books	7 years	Yes, after 2 years	Generally accepted practice
Retirement Information Files	7 years	Yes, after 2 years	
State Reports	Permanent	No	Generally accepted practice

* Contained in the General Ledger

BUILDING			COMMENTS
RECORD TITLE	RETENTION PERIOD OF ORIGINALS	CAN MICROFILM COPIES REPLACE ORIGINALS	
Code Books	Current	N/A	
Specifications/Calculations Structural Energy	2 years	90 days after passing final inspection	Per UBC
Blueprints	2 years	90 days after passing final inspection	
Building Permits/Applications	2 years	Yes after 2 years	GC 34090
Plan Check Comments	5 years	Yes after 2 years	
Soils Reports	5 years	Yes after 2 years	
PLANNING			
Annexations Documents	Permanent	No	
Use Permits	Permanent	Yes, after 2 years	
Environmental Impact Reports	Permanent	Yes, after 2 years	
General Plan Documents – Elements/Maps/Background/Policy Recommendations/ Addendums	2 years after abandonment	*	City to Retain 1 copy of past General Plans for Historical purposes.
General Plan Amendments	Permanent	No	
Parcel Maps – final parcel maps	Permanent	No	
Public Hearing Notices	Permanent	Yes, after 2 years	
Special Studies	5 years	Yes, after 2 years	
Site & Architectural Review Files	5 years	Yes, after 2 years	
Site & Architectural Review Agendas	2 years	*	
Tapes- Site & Architecture Commission Mtg	5 years	N/A	
Tentative Maps	Permanent	No	
Tree Removal Permits	2 years (after tree removal)	*	
Variance Files	5 years	Yes, after 2 years	
Zoning	Permanent	No	
Heritage Preservation Committee			
Property Files	Permanent	No	GC 34090
Meeting Agendas	5 years	Yes after 2 years	
Minutes	Permanent	No	GC 34090

RECORD TITLE	RETENTION PERIOD	CAN MICROFILM COPIES REPLACE ORIGINALS?	COMMENTS
PUBLIC WORKS			
Encroachment Permits	Permanent	Yes, after 5 years	
Building Site Approval Files	Permanent	Yes after 5 years	
Subdivision Files	Permanent	Yes after 5 years	
Parcel Maps	Permanent	Yes after 5 years	
Street Files (Individually filed)	Permanent	Yes after 5 years	
Soils Reports	Permanent (If required by City)	Yes after 5 years	