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Sponsors: Lianne Marshall
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Staff Report for a Resolution Approving Records Retention Schedules for City Records, and Approving the Destruction of Records in Accordance with the Retention Schedules, Subject to the Review and Consent of the City Attorney

SUMMARY AND RECOMMENDATIONS

Working with City departments and Gladwell Governmental Services, Inc., a local government records consultant, staff prepared records retention schedules that specify the retention periods for records kept by the City. The City Manager and the City Clerk recommend that the City Council adopt a resolution, approving the new records retention schedules for the following departments/divisions: Mayor and City Council, City Attorney, City Manager, City Clerk, Information Services, Finance, Library, Public Works, and Recreation and Human Services.

BACKGROUND

Cities have responsibility for managing many different types of records for various governmental purposes. Certain records, such as agreements and purchase orders, are vital to the conduct of a city's day-to-day business; while others, such as meeting minutes, are important historical records.

California Government Code Section 34090 et seq. provides general requirements for the retention of local government records, as well as specific requirements for certain types of records. Retention periods for various types of records are also specified elsewhere in federal, state and local law. For example, in 2012 the City Council adopted Title 10, Chapter 6 of the San Leandro Administrative Code, which requires the City to retain emails for a minimum of two years. Variations in retention periods, as allowed by statute, can be recommended by staff to meet various public or business interests.

The Government Code provides various methods for a city to manage its records program. One alternative allows the City Council to delegate decisions regarding the retention and destruction of records to City staff, once a compliant records retention schedule is in place.

A records retention schedule is a comprehensive inventory of the records maintained by the City. A retention schedule assists City staff in managing the storage of records that must be retained, the timely disposal of records no longer needed, and the preservation of records which are of historical value.

Analysis

The City's current retention schedule was adopted in 1998 by Resolution 98-16. Due to changes in the law, as well as changing business needs and records management demands, major changes to the City's current retention schedule are required.

The City Clerk's Office engaged Gladwell Governmental Services, Inc., a local government records consultant, to assist staff from all City departments in revising each department's records retention schedule. The department retention schedules proposed for adoption have been reviewed and approved by the respective department head and the City Attorney's Office.

Draft retention schedules have also been prepared for the following departments and divisions: Human Resources, Business Development / Community Development, Engineering & Transportation and Police; as well as a Citywide retention schedule that includes records common to many or all departments. These draft retention schedules will be presented to the City Council for approval at a future meeting, once they are reviewed and approved by the respective department head and the City Attorney's Office.

Current Agency Policies

- City records are retained and destroyed in accordance with the adopted records retention schedule.

Previous Actions

- Current records retention schedule was adopted by Resolution No. 98-16 on February 2, 1998.

Legal Analysis

The City Attorney's Office has reviewed and approved the attached records retention schedules proposed for adoption.

Fiscal Impacts

None.

ATTACHMENTS

Attachment to Staff Report

- Resolution No. 98-16, Adopting Records Retention Schedule

Attachments to Resolution

- Records Retention Schedules:
 - City Attorney
 - City Manager
 - City Clerk
 - Mayor & City Council
 - Information Services
 - Finance
 - Library
 - Public Works
 - Recreation and Human Services
- Records Retention Schedule Legend
- How to use Retention Schedules

PREPARED BY: Marian Handa, City Clerk, City Manager's Office