

REPORT TO CITY COUNCIL

DATE: JUNE 9, 2010

TO: HONORABLE MAYOR AND CITY COUNCILMEMBERS

FROM: GREG RAMIREZ, CITY MANAGER

BY: KIMBERLY RODRIGUES, CITY CLERK

SUBJECT: APPROVE RESOLUTION NO. 10-1584; ADOPTING A CITYWIDE RECORDS RETENTION/DESTRUCTION SCHEDULE FOR THE MAINTENANCE AND DISPOSITION OF RECORDS AND RESCINDING RESOLUTION NO. 09-1528

Section 34090 of the Government Code of the State of California provides a procedure whereby the City Council may establish a citywide Records Retention Schedule.

On June 10, 2009, the City Council adopted Resolution No. 09-1528, incorporating amendments and format changes to the Records/Retention Destruction Schedule and rescinding Resolution No. 08-1477

Since the last amendment, staff has reviewed the Records Retention/Destruction Schedule and is recommending the following amendments:

- Cover Page and the Table of Contents have been updated.
- Amendments (highlighted in gray) were made to the following department schedules: City Clerk (pp. 12-18) and Community Development/Planning (pp. 28-37); including page renumbering.
- The records destruction request form (Exhibit “A”) and duplicate records destruction request form (Exhibit “B”) were updated and, once adopted, will include reference to Resolution No. 10-1584.
- The records inventory control form (Exhibit “C”) has been updated and, once adopted, will be incorporated for use in the records inventory process for offsite storage.

In addition to approving the above changes, the City Attorney’s Office has recommended the City Council rescind Resolution No. 09-1528 and adopt the newly revised Records Retention/Destruction Schedule (Resolution No. 10-1584).

Staff will continue to review and update the citywide Records Retention/Destruction Schedule and bring forth any recommended changes for City Council approval on an annual basis.

RECOMMENDATION

Staff respectfully recommends the City Council adopt Resolution No. 10-1584; approving a citywide Records Retention/Destruction Schedule (including the new destruction and inventory forms) for the maintenance and disposition of records, and rescinding Resolution No. 09-1528.

Attachment: Resolution No. 10-1584, with Exhibits A-C
Records Retention Schedule (Appendix I)

RESOLUTION NO. 10-1584

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF AGOURA HILLS, CALIFORNIA, ADOPTING A CITYWIDE RECORDS RETENTION/DESTRUCTION SCHEDULE FOR THE MAINTENANCE AND DISPOSITION OF RECORDS AND RESCINDING RESOLUTION NO. 09-1528

THE CITY COUNCIL OF THE CITY OF AGOURA HILLS RESOLVES AS FOLLOWS:

WHEREAS, the retention of numerous records is unnecessary after a certain period of time for the effective and efficient operation of the government of the City of Agoura Hills.

WHEREAS, the approval of guidelines for the ongoing disposition of obsolete City records will assist the City in the effective management of records, as well as provide for the efficient review of records proposed for disposal.

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

NOW, THEREFORE, BE IT RESOLVED, by the City Council of the City of Agoura Hills as follows:

Section 1. The attached Records Retention/Destruction Schedule, which is attached hereto as Appendix I and incorporated herein by this reference, is hereby approved.

Section 2. The types of records identified in the Records Retention/Destruction Schedule, generated or received by the City are hereby authorized for disposition as outlined in that schedule in accordance with Section 34090, et seq. of the Government Code of the State of California, upon the written consent of the City Clerk and the City Attorney, and with the approval of the City Council of the City.

Section 3. Upon such written consent and approval, the City Clerk may destroy any City record, document, instrument, book or paper, under his or her charge, without making a copy thereof, after the same is no longer required. This resolution does not authorize the destruction of permanent records set forth in Government Code Section 34090, which include: (a) records affecting the title of real property or liens thereon; (b) court records on any subject where litigation is pending; (c) records required to be kept by statute; (d) records less than two years old; (e) the minutes, ordinances or resolutions of the legislative body or of a City Board or Commission. The review by the City Clerk and the City Attorney shall include the determination that the subject records no longer have any administrative value, legal value, evidential value, fiscal value or research and historical value.

Section 4. The destruction of any record as provided for herein shall be by disposal, recycling, shredding or other effective method of destruction, as approved by the City Clerk. All records of a sensitive or confidential nature shall be shredded, under the direct supervision of the City Clerk.

Section 5. The term “record” or “records,” as defined in Government Code Section 14741 and as used herein, shall mean all papers, maps, exhibits, magnetic or paper tapes, photographic films and prints, punched cards, and other documents produced, received, owned or used by the City, regardless of physical form or characteristics; that the term “public records,” as defined in Government Code Section 6252 and used herein, shall include any writing containing information relating to the conduct of the public’s business prepared, owned, used or retained by the City regardless of physical form or characteristics; and that the term “writing,” as defined in Government Code Section 6252 and as used herein, shall mean handwriting, typewriting, printing, photostating, photographing, and every other means of recording upon any form of communication or representation, including letters, words, pictures, sounds, or symbol, or combination thereof, and all papers, maps, magnetic or paper tapes, photographic films and prints, magnetic or punched cards, discs, drums and other documents.

Section 6. Any records not specified in the Records Retention/Destruction Schedule shall not be destroyed without the express approval of the City Attorney and a resolution acted upon by the City Council.

Section 7. On each occasion that a Department Head requests the destruction of records, such request shall be made on a “Records Destruction Request Form” (see attached sample identified as Exhibit “A”). This form shall include the finding that all of the records are more than two years old and/or have been retained for the minimum retention period as specified in this resolution. This form shall include the determination that the records no longer have any administrative, legal, evidential, fiscal or research and historical value. This form shall include a description of the records sufficient for identification, including the year of the record, the category from the Records Retention/Destruction Schedule, and a specific description of the record. The Department Head, the City Clerk, and the City Attorney shall authorize the destruction of records. The “Certificate of Destruction” provided by the City’s shredding company will stipulate the date of destruction, the destruction method used, and the name of the person supervising the destruction. The form is signed by the City Clerk. All records destruction forms shall be maintained as permanent City records in the City Clerk’s office. While the attached sample forms may be changed periodically and may even be consolidated, each of them shall retain the titles shown and shall contain the required information specified in this section.

Section 8. Pursuant to Section 34090.7 of the Government Code of the State of California, notwithstanding the provisions of Section 34090, the City Council may prescribe a procedure under which duplicates of City records less than two years old may be destroyed if they are no longer required.

Section 9. The City Council hereby authorizes destruction of duplicate records, utilizing Exhibit “B,” attached hereto, with the approval of the Department Head, the City Clerk and the City Attorney.

Section 10. The City Council hereby authorizes the records inventory control form, attached hereto as Exhibit “C”, for creating an inventory list for records boxed for offsite storage. Upon completion of the form by the department’s records coordinator, the original and four copies will be distributed as follows: original and one copy to the City Clerk, one copy to the department's *Records Management Handbook*, one copy inserted in front of the first file in the storage box, and one copy for Access Information Management. The City Clerk shall retain the master citywide *Offsite Storage Records Inventory* binder, along with the master list of the Agoura Hills (and their corresponding Access/York Storage) box numbers.

Section 11. The Records Retention/Destruction Schedule shall be reviewed on an annual basis by the City Clerk. The review process shall include a legal analysis with regard to any changes in the various statutes. Following a thorough review, the City Clerk shall present the entire Records Retention/Destruction Schedule with any recommended changes to the City Council for approval.

Section 12. Pursuant to Government Code Section 6200 relating to offenses by an official custodian, every officer having the custody of any record, map or book, or of any paper or proceeding of any court, filed or deposited in any public office, or placed in his or her hands for any purpose, is punishable by imprisonment in the state prison for two, three or four years if, as to the whole or any part of the record, map, book, paper or proceeding, the officer willfully does or permits any other person to do any of the following: (a) steal, remove or secrete; (b) destroy, mutilate or deface; or (c) alter or falsify. Pursuant to Section 6201, relating to offenses by persons other than custodial officers, every person not an officer referred to in Section 6200, who is guilty of any of the acts specified in that section, is punishable by imprisonment in the state prison, or in a county jail not exceeding one year, or by a fine not exceeding one thousand dollars (\$1,000), or by both such fine and imprisonment.

Section 13. Resolution No. 09-1528 is hereby rescinded.

Section 14. This resolution shall be in full force and effect immediately upon its passage and adoption thereof.

PASSED, APPROVED, AND ADOPTED this 9th day of June, 2010, by the following vote to wit:

AYES: (0)
NOES: (0)
ABSTAIN: (0)
ABSENT: (0)

William D. Koehler, Mayor

ATTEST:

Kimberly M. Rodrigues, City Clerk



CITY OF AGOURA HILLS RECORDS DESTRUCTION REQUEST FORM

Department:	Prepared by:	Date:	Agoura Hills Box No.:	York Storage Box No.:
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Page No.:	Item No.:	Record Series Title and Contents <i>(as listed in Records Retention Schedule)</i> :
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Listed below and/or attached is a detailed list of records for which I am requesting destruction. The list includes a description of each record sufficient for identification, including the retention schedule page no., record series title and contents, record dates, retention requirements, and destruction date. Unless otherwise directed, the method of destruction proposed is shredding. I hereby certify that the records listed below and/or attached are more than two years old and/or have been retained for the minimum retention period specified in Resolution No. 10-1584. I further certify that the records listed no longer have any administrative, legal, evidential, fiscal or research and historic value and do not affect the title to real property or liens thereon, are not court records, are not, to my knowledge, required to be kept further by a statute, are not the minutes, ordinances or resolutions of the City Council or any City board or committee, and are no longer required by the City. I request authority to destroy same pursuant to Section 34090 of the California Government Code.

List of Files Recommended for Destruction: <i>(Description or title of records as listed on file label)</i>	Date of Records		Citation Number:	Destruction Date:
	From:	To:		
	mm/dd/yr	mm/dd/yr		mm/dd/yr

DESTRUCTION AUTHORIZATION

DEPARTMENT HEAD:	CITY ATTORNEY:	CITY CLERK:
_____ Signature	_____ Signature	_____ Signature
_____ Date	_____ Date	_____ Date

Date City Council Approved Records for Destruction: _____ *Actual Date Records Destroyed:* _____



**CITY OF AGOURA HILLS
DUPLICATE RECORDS - DESTRUCTION REQUEST FORM**

Department:	Prepared by:	Date:
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Pursuant to Section 34090.7 of the Government Code of the State of California, notwithstanding the provisions of Section 34090, I certify that the records listed below and/or attached are duplicates of City records, are no longer required, and may be destroyed as specified in Resolution No. 10-1584.

List of Duplicate Files Recommended for Destruction: <i>(Description or title of records as listed on file label)</i>	No. of Copies	Citation Number:	Destruction Date:
		34090.7	mm/dd/yr

ADMINISTRATIVE AUTHORIZATION FOR DESTRUCTION OF DUPLICATE RECORDS

DEPARTMENT HEAD:	CITY ATTORNEY:	CITY CLERK:
_____	_____	_____
Signature	Signature	Signature
_____	_____	_____
Date	Date	Date

Actual Date Duplicates Destroyed: _____



CITY OF AGOURA HILLS RECORDS INVENTORY CONTROL FORM

Department/Division:	Prepared by:	Date:	Agoura Hills Box No.:	York Storage Box No.:
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List of Files Recommended for Destruction: <i>(Description or title of records as listed on file label)</i>	Citation Number:	Destruction Date:
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		mm/dd/yr

Instructions: Create a form for each box of records. Type in the Department/Division, Prepared by, Date, and enter the next (departmental) Agoura Hills Box Number. Create a list of the files to be stored in the York box, including the titles as listed on the file label(s) and/or the titles of any bound documents. Enter the citation and destruction date for each entry based on your department's section of the Agoura Hills Records Retention/Destruction Schedule. Upon completion of the form, print and initial the original and make four copies and distribute as follows: Original and one copy to the City Clerk, one copy to your department's Records Management Handbook, one copy inserted in front of the first file in the York box (do not tape inventory sheet to the box lid), and one copy for York Business Records Storage. Contact the City Clerk's Office to schedule a pick up of the new York box(es). Once assigned by York, the City Clerk will provide the York Storage Box numbers to the respective departments. Manually add the York Storage Box number to the Records Inventory Control Form in your department's handbook. The master citywide Offsite Storage Records Inventory binder will be retained by the City Clerk.

CITY CLERK'S OFFICE USE ONLY

Storage Entry Date: _____ Destruction Date: _____ Other: _____

City of Agoura Hills

Records Retention/Destruction Schedule

Seventh Edition

Adopted by City Council on June 9, 2010

Office of the City Clerk





AGOURA HILLS

**2010 Records Retention/Destruction Schedule
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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Administration/City Manager						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	City Council Conference Records Correspondence Registration materials	2	-	2	-	Citation: California Government Code, Section 34090
2.	City Council Correspondence Files General correspondence Incoming correspondence (individual) Outgoing correspondence (individual)	2	-	2	-	Citation: California Government Code, Section 34090
3.	City Manager's Department - Departmental Reports	2	-	2	-	Citation: California Government Code, Section 34090
4.	City Manager's Department -- City Department and Division Files: Correspondence and memos Reports Supporting data	2	-	2	-	This record series describes files held by the City Manager's Department on each of the City Departments and the City Manager's Department Divisions. The files are a mixture of original documents. Citation: California Government Code, Section 34090
5.	Community Grant Program Applications Correspondence and supporting data	CL+1	2	CL+4	-	This record series is for records of grants awarded by the City to applicants for the annual Community Grant Program. CL (Closed/Completed) represents the date the issues, and the applicant formally accepts, the grant funds. Citation: 29 CFR 97.42

RETENTION CODES: A = Audit AR = Annual Review CL = Closed / Completed E = Expiration P = Permanent S = Superseded T = Termination

C,H,V CODES: C = Confidential H = Historical V = Vital

DEPARTMENT: Administration/City Manager						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
6.	Correspondence Chronological Files	2	-	2	-	Correspondence Chronological files are files containing copies of internally generated correspondence and memos. These copies are filed in chronological order for quick access and retrieval. Citation: California Government Code, Section 34090
7.	False Alarms Annual Records Correspondence	CL +3	-	CL +3	-	Citation: California Penal Code, Section 801
8.	Las Virgenes Unified School District Agendas and reports Correspondence and memos	2	-	2	-	Citation: California Government Code, Section 34090
9.	Organizations Files - Civic Organizations: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	Examples include Chamber of Commerce, Rotary Club, Homeowners Association. This record series is for general correspondence and communications with civic organizations. Records pertaining to agreements or projects with these organizations are addressed by and subject to the retention requirements in the record series 'City Clerk - Agreements/ Contracts'. Citation: California Government Code, Section 34090

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DEPARTMENT: Administration/City Manager						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
10.	Organizations Files – Government Agencies: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	Examples include County of Los Angeles, Local Agency Formation Committee (LAFCO), Las Virgenes Unified School District (LVUSD), and other cities. This record series is for general correspondence and communications with government agencies. Records pertaining to agreements or projects with these organizations are addressed by and subject to the retention requirements in the record series 'City Clerk - Agreements/ Contracts'. Citation: California Government Code, Section 34090
11.	Organizations Files - Professional Organizations: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	Examples include California Joint Powers Insurance Authority (JPIA), League of California Cities, and Southern California Association of Governments (SCAG). This record series is for general correspondence and communications with professional organizations. Records pertaining to agreements or projects with these organizations are addressed by and subject to the retention requirements in the record series 'City Clerk - Agreements/ Contracts'. Citation: California Government Code, Section 34090
12.	Sheriff's Reports – Monthly	5	-	5	-	Citation: California Government Code, Section 34090

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Administration/Civic Center/Library						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	<p>Capital Improvement Project (CIP) Files:</p> <p>Change orders files, including:</p> <ul style="list-style-type: none"> Change orders Change order requests Correspondence and supporting data Cost estimates Review documentation <p>Consultant files, including:</p> <ul style="list-style-type: none"> Contracts, amendments and supporting data (copies) Correspondence and supporting data; Meeting notes <p>Contractor files, including:</p> <ul style="list-style-type: none"> Bonds (copies) Contracts, amendments and supporting data (copies) Correspondence and supporting data Insurance documentation (copies) <p>Design records, including:</p> <ul style="list-style-type: none"> Calculations Correspondence and supporting data Design research and survey data Drawings Right-of-way documentation – deeds Quitclaims, easements (copies) 	CL+1	9	CL+10	-	<p>Files are retained for completion of the project and all terms of the project contracts and agreements, plus 10 years. At that time, the files will be evaluated by the department. If the structure still exists, or if the files have historical value, or if the files are needed for City operations, they will be retained for an additional time period.</p> <p align="center">Citation: California Code of Civil Procedure, Section 337.15, S/L</p>

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DEPARTMENT: Administration/Civic Center/Library						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
	Payments files, including: Correspondence and supporting data Inspections files/daily inspectors' reports Project studies and reports Progress payments (copies) Purchase orders and invoices (copies) Permits files, including: Applications and backup data Permits issued	P	P	P	-	Citation: California Government Code, Section 34090

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Administration/Personnel						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	Compensation surveys	S+3	-	S+3		Citation: California Government Code, Section 34090
2.	Correspondence Chronological Files	2	-	2	-	Correspondence Chronological files are files containing copies of internally generated correspondence and memos. These copies are filed in chronological order for quick access and retrieval. Citation: California Government Code, Section 34090
3.	Employee Benefits Administration Records: Correspondence and backup data Enrollment forms Plan documents	T	P	P	V	Benefits records are also held by the administering organization (PERS). Citation: California Government Code, Section 34090
4.	Medical Files: Exposure to hazards (toxic chemicals, high levels of noise, airborne contaminants or bloodborne pathogens or other occupational safety issues) No exposure to hazards	T+2 T+2	28 4	T+30 T+6	C	Citation: CalOsha 8 CCR 3207(d)(1) Citation: California Government Code, Section 34090
5.	Organizations Files – Civic, Government, Professional: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	This record series is for records of general communications with organizations and agencies that the Department corresponds with. This series is not for project or activity-specific records. Citation: California Government Code, Section 34090

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DEPARTMENT: Administration/Personnel						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
6.	Personnel Files: Applications Correspondence and memos Dept of Justice (DOJ) – Criminal History Records Direct deposit authorizations I-9 Forms Performance evaluations Personnel action forms Resumes	T+2	4	T+6	C	The Citation is for T+6. T represents termination or resolution of all issues, whichever is later. Citation: California Government Code, Section 12946 Citation: California Government Code, Section 34090
7.	Recruitment Files: Applicant responses and resumes Compensation studies Correspondence and backup data Job position announcements	CL	3	CL+3	-	Citation: 29 CFR 1627.3 Citation: California Government Code, Section 34090
8.	Resumes (Unsolicited)	2	-	2	-	Citation: California Government Code, Section 34090
9.	Rules and Regulations	S+2	P	P	H	Citation: California Government Code, Section 34090

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Administration/Risk Management						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	Accident Reports/Incident Reports	5	-	5	-	Citation: California Government Code, Section 34090
2.	Claims (Against the City) Files: Backup data Claim forms Claim letters Correspondence and memos Court transcripts/documents	CL	5	CL+5	-	For this record series, CL (Closed/Completed) represents settlement of the claim. Citation: California Government Code, Section 34090
3.	Claims Loss Runs (Fiscal Year End)	5	-	5	-	Citation: California Government Code, Section 34090
4.	Claims Loss Runs (Monthly)	2	-	2	-	Citation: California Government Code, Section 34090
5.	Correspondence Chronological Files	2	-	2	-	Correspondence Chronological files are files containing copies of internally generated correspondence and memos. These copies are filed in chronological order for quick access and retrieval. Citation: California Government Code, Section 34090
6.	OSHA Logs/Reports	T+5	-	T+5	-	T represents the year to which the records relate. Citation: California Government Code, Section 34090

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DEPARTMENT: Administration/Risk Management						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
7.	Organizations Files – Civic, Government, Professional: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	This record series is for records of general communications with organizations and agencies that the Department corresponds with. This series is not for project or activity-specific records. Citation: California Government Code, Section 34090
8.	Southern California Joint Powers Insurance Authority (SCJPIA) Administrative Files: Budgets and financial statements Bulletins and publications Correspondence Meeting agendas Reports and studies	5	-	5	-	Citation: California Government Code, Section 34090
9.	SCJPIA Certificates of Liability: Certificates and backup data	E+1	P	P	-	Citation: California Government Code, Section 34090
10.	Workers Compensation Insurance Administration Records: Correspondence and backup data Loss analyses Statements	5	-	5	-	Citation: California Government Code, Section 34090
11.	Workers Compensation Insurance Policies	S	P	P	-	Citation: California Government Code, Section 34090

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Administration/Transportation						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	Grants Files: Applications and supporting data Audits, approvals and releases (grant completion documentation) Budgeting and financial data Contracts, amendments and supporting data (original contracts are in City Clerk's Office) Correspondence and supporting data Reports to granting agency Rules, regulations, and procedures	CL+1	3	CL+4	-	For this record series, CL (Closed/Completed) represents date of last expenditure report or until resolution of all issues arising from litigation, claim, audit, or other action involving the records, whichever is later. Citation: 29 CFR 97.42
2.	Program Files (City-Participation) Dial-A-Ride MTA	CL+1	4	CL+4	-	Includes programs initiated and administered by this department, and programs initiated and administered by other agencies in which the City participates. Citation: California Government Code, Section 34090
3.	Transportation - Planning Projects Files (Administrative Files): Agenda reports (copies) Bids and proposals (originals in City Clerk Dept.) Contracts and agreements Correspondence and supporting data Drafts, reviews, comments Evaluation and selection documentation Financial data RFPs/Invitations to bid	CL+1	9	CL+10	-	Originals of contracts and successful bids are filed in the record series 'Agreements/Contracts'. For this record series, CL (Closed/Completed) represents completion of all terms of the contract/agreement with consultant providing transportation planning services. Citation: California Code of Civil Procedure, Section 337.15, S/L

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DEPARTMENT: Administration/Transportation						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
4.	Transportation - Planning Projects Files (Final Documentation): Final reports, studies, surveys, maps, etc.	P	-	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. This record series is for the final work product produced in transportation planning projects. Citation: California Government Code, Section 34090
5.	Transportation - Programs Files: Correspondence and supporting data Program rules, regulations, and procedures Reports and studies	CL+2	-	CL+2	-	Includes programs initiated and administered by this department, and programs initiated and administered by other agencies in which the City participates. Citation: California Government Code, Section 34090

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	Agreements, Contracts, and Leases: Correspondence and backup data, except those affecting title Executed documents, amendments and exhibits	CL+1	4	CL+5 (original) P (optical imaging system)	H	For this record series, CL (Closed/Completed) represents completion of all terms of the agreement or contract (Not applicable to those affecting title). This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Code of Civil Procedure, Section 337.15
2.	Bids/Proposals Files (Successful Bidders): Agreements/contracts Bids/proposals received Correspondence and backup data Requests for bids/proposals Specifications and backup data	CL+1	4	CL+5 (original) P (optical imaging system)	H	For this record series, CL (Closed/Completed) represents completion of all terms of the executed contract or agreement with the organization submitting the successful bid or proposal. This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Code of Civil Procedure, Section 337.15
3.	Bids/Proposals Files (Unsuccessful Bidders): Bids/proposals received	2	-	2	C	Citation: California Government Code, Section 34090
4.	Bonds - Subdivision, Grading, Developer Guarantee: Bond documents and supporting data Bond release letters	CL+1	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. For this record series, CL (Closed/Completed) represents exoneration of a grading bond. Citation: California Government Code, Section 34090

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C,H,V CODES: C = Confidential H = Historical V = Vital

DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
5.	CDBG (Community Development Block Grant) Files: Agreements, contracts and amendments Correspondence Procedures and administrative materials Public notices	CL+1	3	CL+4	-	CDBG = Community Development Block Grant. For this record series, CL (Closed/Completed) represents date of last expenditure report, or until resolution of all issues arising from litigation, claim, audit, or other action involving the records, whichever is later. Citation: 29 CFR 97.42
6.	City Commissions and Agoura Hills <u>Financing Authority</u> <u>and Redevelopment</u> —Agency - Agendas, Minutes, _ _Resolutions	P	-	P	H	This record series will be archived onto the City's Optical System for permanent retention. Citation: California Government Code, Section 34090
7.	City Commissions and Committees - Applications (Unsuccessful): Applications Correspondence	2	-	5	-	Citation: California Government Code, Section 34090 Citation: California Government Code, Section 81009
8.	City Commissions and Committees - Maddy Act (Local Appointments List) Reports	5	-	5	-	Citation: California Government Code, Section 34090

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
9.	City Commissions and Committees - Members Records: Applications Certificates Correspondence Letters of appointment Letters of resignation Oaths	T+2	-	P	H	For this record series, T (Termination) represents termination of member participation in a commission or committee. Citation: California Government Code, Section 34090 Citation: California Government Code, Section 81009
10.	City Council, Agoura Hills Financing Authority and Agoura Hills Redevelopment Agency - Meetings - Agenda Packets: Staff reports and backup data	P3	-	P	-	This Record Series will be archived onto the City's optical imaging system. Citation: California Government Code, Section 34090
11.	City Council Meetings - Agendas Agoura Hill Financing Authority - Agendas Agoura Hills Redevelopment Agency - Agendas	P	-	P	-	This record series will be archived onto the City's Optical System for permanent retention. Citation: California Government Code, Section 34090 and 34090.5
12.	City Council, Agoura Hills Financing Authority, and Agoura Hills Redevelopment Agency and Commission Meetings - Audio Tapes	1	-	1	-	Official records of City Council/Financing Authority/Redevelopment Agency / Commission meetings are in the record series 'City Council Minutes, Ordinances and Resolutions', and 'Planning - Agoura Hills Financing Authority and Redevelopment Agency Commission Minutes and Resolutions', and 'Community Services Committee Minutes' which are scheduled for permanent retention.

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
						Citation: California Government Code, Section 34090.7
13.	City Council Agoura Hills Financing Authority, and Agoura Hills Redevelopment Agency and Commission Meetings - Video Tapes	1	-	1	-	<p>Official records of City Council/Financing Authority/Redevelopment Agency /Commission meetings are in the record series 'City Council Minutes, Ordinances and Resolutions', and 'Agoura Hills Financing Authority and Redevelopment Agency Commission Minutes and Resolutions', which are scheduled for permanent retention.</p> <p>Official records of City Council/Commission meetings are in the record series 'City Council Minutes, Ordinances and Resolutions', and 'Planning Commission Minutes and Resolutions', and 'Community Services Committee Minutes' which are scheduled for permanent retention.</p> <p>Citation: California Government Code, Section 34090.7</p>
14.	City Council Meetings and Council Standing Committee - Notices: Declarations of posting Notices of adjournment Notices of rescheduled meetings Notices of special meetings	2	-	2	-	Citation: California Government Code, Section 34090
15.	City Council Minutes, Ordinances and Resolutions	P	-	P	V,H	Citation: California Government Code, Section 34090
16.	City Council Ordinances and Resolutions Indexes	P	-	P	H	Citation: California Government Code, Section 34090
17.	City Council Standing Committee Agendas	2	-	P	H	This record series will be archived onto the City's

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
						optical imaging system for permanent retention. Citation: California Government Code, Section 34090
18.	City Council Standing Committee Agendas (Action)	2	-	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
19.	City History Files: Selected historical records, including: Articles and news clippings City newsletters City publications Maps and drawings Photographs Press releases Reports and studies	P	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
20.	City Incorporation Documents	P	-	P	H	Citation: California Government Code, Section 34090
21.	Correspondence Chronological Files	2	-	2	-	Correspondence Chronological files are files containing copies of internally generated correspondence and memos. These copies are filed in chronological order for quick access and retrieval. Citation: California Government Code, Section 34090

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
22.	Election Records - Ballots, Absent Voter Ballots and Absentee Applications	CL+6 mos	-	CL+6 mos	-	The County of Los Angeles is the City's contractor for elections and maintains this record series. Citation: California Election Code, Sections 17302 and 17505
23.	Election Records - Campaign Statements (FPPC 410 - 460, 470, 501, AH 10, 20, 30, 40): Candidates' (elected) committee statements Candidates' (elected) statements Officeholders' statements Officeholders' committee statements	5	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 81009
24.	Election Records - Campaign Statements (FPPC 410 - 460, 470, 501, AH 10, 20, 30, 40): Candidates' (not elected) committee statements Candidates' (not elected) statements	CL+5	-	CL+5	-	Citation: California Government Code, Section 81009
25.	Election Records - Campaign Statements (FPPC 410 - 460, 470, 501, AH 10, 20, 30, 40): Political Action Committees' (PAC) statements	CL+7	-	CL+7	-	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 81009
26.	Election Records - Election Administration Files: Communications with election consultants Communications with FPPC Correspondence and backup data Rules and procedures	2	-	2	-	Citation: California Government Code, Section 34090
27.	Election Records - Election History Files:	10	P	P	H	This record series will be archived onto the City's

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
	Certificates of destruction for election materials Declaration of results (copies; official in City Council Resolutions) Other resolutions re: election (copies; official in City Council Resolutions) Sample ballots					optical imaging system for permanent retention. Citation: California Government Code, Section 34090
28.	Election Records - Petitions: Initiatives petitions Recall petitions Referendum petitions	CL+8mo	-	CL+8mo	-	For this record series, CL (Closed/Completed) represents certification of election results, or, (when no election occurs) the Clerk's final examination of the petition. Citation: California Election Code, Section 17200
29.	Election Records - Rosters and Indexes	CL+5	-	CL+5	-	For this record series, CL (Closed/Completed) represents certification of election results. Citation: California Election Code, Section 17300
30.	Equipment Files: Correspondence and backup data Owners manuals Purchase information Service/maintenance information	T+2	-	T+2	-	For this record series, T (Termination) represents termination of ownership of the equipment and assumes minimum of one year. Citation: California Government Code, Section 34090
31.	External Committees/Organizations Files: Correspondence Minutes and agendas Presentation/seminar materials Reference materials Reports and studies	2	-	2	-	This record series is for files on committees/organizations that Department staff attends or communicates with as a representative of the City. These are not records of City-sponsored committees or organizations. Citation: California Government Code, Section 34090

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
32.	Finance - City Budgets: Final budget documents	10	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. This series is for the final budget documents only. Budget development files are held by Finance Department. Citation: California Government Code, Section 34090
33.	General Plan	S	P	P	V,H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
34.	Grants - Grant Administration and Implementation Files: Applications and supporting data Audits, approvals and releases (grant completion documentation) Bids and selection documentation (if a formal bid, original records are in City Clerk's Office bid/contract files) Budgeting and financial data Consultants/contractors records (if consultant/contractor services are used) Contracts, amendments and supporting data (original contracts are in City Clerk's Office Contract files) Correspondence and supporting data Environmental documentation (when required) Labor compliance documentation (when required) Reports to granting agency	CL+1	2	CL+4	-	This record series is for records of grants (federal, state or local) received by the City which are not CDBG grants. (CDBG grant files are addressed in separate record series.) For this record series, CL (Closed/Completed) represents date of last expenditure report, or until resolution of all issues arising from litigation, claim, audit, or other action involving the records, whichever is later. Citation: 29 CFR 97.42

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
	Rules and procedures					
35.	Land Planning/Use Files: Correspondence and memos Environmental documentation Maps and drawings Public hearing documentation Reports and studies	CL	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. For this record series, CL (Closed/Completed) represents completion of the land planning/use project. Official project files are held by Community Development/Planning. City Clerk files contain final documents presented to City Council. Citation: California Government Code, Section 34090
36.	Litigation Files	P	-	P	-	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090.7
37.	Municipal Code	P	-	P	V	Citation: California Government Code, Section 34090 (Superseded plus 2)

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
38.	Organizations Files - Civic Organizations: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	Examples include Chamber of Commerce, Rotary Club, Homeowners' Association. This record series is for general correspondence and communications with civic organizations. Records pertaining to agreements or projects with these organizations are addressed by and subject to the retention requirements in the record series 'Agreements/ Contracts'. Citation: California Government Code, Section 34090
39.	Organizations Files - Government Agencies: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	Examples include FPPC, County of Los Angeles, LAFCO, and other cities. This record series is for general correspondence and communications with government agencies. Records pertaining to agreements or projects with these organizations are addressed by and subject to the retention requirements in the record series 'Agreements/ Contracts'. Citation: California Government Code, Section 34090
40.	Organizations Files - Professional Organizations: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	Examples include SCAG, CCAC, and IIMC. This record series is for general correspondence and communications with professional organizations. Records pertaining to agreements or projects with these organizations are addressed by and subject to the retention requirements in the record series 'Agreements/ Contracts'. Citation: California Government Code, Section 34090
41.	Petitions to City (informal)	2	-	2	-	Citation: California Government Code, Section 34090

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
42.	Policies and Procedures (Originating from this Department)	S+1	9	S+10	V	This record series describes all policies and procedures originating from this department. Citation: California Government Code, Section 34090
43.	Public Hearings Notices: Certified mail receipts Mailing lists Notices Proof of publication	2	-	2	-	Citation: California Government Code, Section 34090
44.	Public Records Requests (Not Related to Litigation): Public Records Request Forms (Original) Email Requests (including electronic copies) Letter Requests Correspondence and backup data	2	-	2	-	Citation: California Government Code, Section 34090
45.	Real Property - Annexations Files: Certificates of completion Correspondence and backup data	P	-	P	V,H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
46.	Real Property - Certificates of Compliance (Lot Line Adjustments): Certificates and supporting data	P	-	P	V,H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
47.	Real Property - Dedications Files: Correspondence and supporting data Offers of dedication and exhibits	P	-	P	V,H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
48.	Real Property - Detachments/Withdrawals Files: Correspondence and supporting data Maps and drawings Studies and reports	P	-	P	V,H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
49.	Real Property - Real Property Files: Deeds and supporting data Easements and supporting data Quitclaims and supporting data	P	-	P	V,H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
50.	Records Management - City Retention Schedules	S	P	P	-	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
51.	Records Management - Destroyed Records Lists and Approvals	P	-	P	-	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
52.	Records Management - Stored Records Lists	S	-	P	-	Keep old lists for reference.

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
53.	Risk Management - City-Owned Insurance Records: Correspondence and backup data Insurance policies and certificates Policy information	E+1	P	P	-	Citation: California Government Code, Section 34090
54.	Risk Management - Insurance Certificates (businesses doing business with the City)	E+1	P	P	-	Citation: California Government Code, Section 34090
55.	Special Assessment Districts Files: Annual Engineering reports to the City Correspondence and supporting data Public hearings documentation	P	-	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
56.	Statements of Economic Interest - Form 700: Appointees' statements Candidates' statements Officeholders' statements	4	-	P	-	Duplicate series. Official is with the FPPC. Citation: California Government Code, Section 81009
57.	Statements of Economic Interest - Forms 700: Designated City employees' statements	7	-	7	-	Citation: California Government Code, Section 81009

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DEPARTMENT: City Clerk						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
58.	Subject Files: Correspondence and backup data Publications Reports and studies	5	-	5	-	This record series is for materials held by the City Clerk on subjects or topics which the City receives or gathers for study or informational purposes. Examples are proposed programs, (Business License), proposed legislation, information on projects or programs established by other cities, etc. These files do not contain documentation of City business, transactions or policy decisions. (If a subject file results in an active program or project, the materials become subject to the retention for that specific record series category). Citation: California Government Code, Section 34090

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Community Development/Block Grants						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	Grants - CDBG Program Administration Files: Audits, approvals, and releases (grant completion) Blanket agreements, amendments, and supporting data (original agreements in City Clerk's Office) Correspondence and supporting data Cost summaries Memorandums of Understanding (MOU's) Reports to granting agency Requisitions Rules, regulations, and procedures	CL+3	1	CL+4	-	CDBG = Community Development Block Grant. For this record series, CL (Closed/Completed) represents date of last expenditure report, or until resolution of all issues arising from litigation, claim, audit, or other action involving the records, whichever is later. Citation: 29 CFR 97.42
2.	Grants - CDBG Project Administration Files: Agreements and contracts (if a formal bid, originals are in City Clerk's Office) Audits, approvals, and releases (grant completion documentation) Bids and selection documentation (if a formal bid, original records are in City Clerk's Office) Budgeting and financial data Consultants/contractors records (if consultant or contractor services are used) Correspondence and supporting data Memorandums of Understanding (MOU's) Procedures to Implement MOU's (original MOU's are in City Clerk's Office) Project rules and procedures Requisitions	CL+3	1	CL+4	-	CDBG = Community Development Block Grant. For this record series, CL (Closed/Completed) represents date of last expenditure report, or until resolution of all issues arising from litigation, claim, audit, or other action involving the records, whichever is later. Citation: 29 CFR 97.42

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DEPARTMENT: **Community Development/Block Grants**

Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
3.	<p>Grants - CDBG Projects Files:</p> <ul style="list-style-type: none"> Applications and supporting data Agreements and contracts Correspondence and supporting data Financial documentation Labor compliance documentation (when required) Memorandums of Understanding (MOU's) Requisitions <p>Reyes Adobe</p>	CL+3	1	CL+4	-	<p>CDBG = Community Development Block Grant. Note: This record series is for records of specific projects implemented using funds authorized by MOU's (see the record series CDBG Project Administration Files). Retention of this series is based on retention of the associated CDBG Project Administration Files; files for all individual projects funded under a specific MOU will be retained for four years following date of last expenditure report, or until resolution of all issues arising from litigation, claim, audit, or other action involving the records, whichever is later.</p>
		P	P	P	H	<p>Citation: 29 CFR 97.42</p>

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Community Development/Code Enforcement						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	Code Enforcement - Case Files: Case research materials, photographs & supporting data Certified mail receipts Code enforcement letters (notices of violations) Correspondence and backup data Documentation of case resolution	CL+3	-	CL+3		Citation: California Penal Code, Section 801

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VHC CODES: V = Vital H = Historical C = Confidential

CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Community Development/Planning						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	Administrative Permits, e.g., Modifications, Outdoor dining	CL+4-3	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, section 34090
2.	Agoura Village Development Permits	CL+3	P	P	H	Citation: California Government Code, section 34090
3.	Appeals : Directors decisions Planning Commission decisions	CL	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, section 34090
4.	Architectural Review Board: Agendas Correspondence Declaration of postings Minutes	P	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
5.	Case Logs (Project Logs).	P	-	P	-	This record series describes the logs listing all projects arranged by project type. Citation: California Government Code, Section 34090

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DEPARTMENT: Community Development/Planning						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
6.	CEQA Legal Notices: Notices of completion Notices of determination Notices of exemption Notices of preparation	P	-	P	-	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
7.	Conditional Use Permits	CL+3	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
8.	Correspondence Chronological Files	2	-	2	-	Correspondence Chronological files are files containing copies of internally generated correspondence and memos. These copies are filed in chronological order for quick access and retrieval. Citation: California Government Code, Section 34090
9.	Day Care Permits	CL+3	P	P	H	Citation: California Government Code, section 34090
10.	Economic Development Financial Shopping centers	15 5		P P	H H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090

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DEPARTMENT: Community Development/Planning						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
11.	Film Permit Files (includes Bike/Parade/Run Permits): Applications Certificates of insurance Correspondence and supporting data Requests for refunds (copies; official is in Finance)	E+2	-	E+2	-	Citation: California Government Code, Section 34090
12.	General Plan and Specific Plan Amendment Records: Agendas and minutes (copies) Agenda reports Comments Correspondence and supporting data Environmental documents Mailing lists Maps and drawings Notices (copies) Reports and studies Resolutions and ordinances (copies)	CL+4-3	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. For this record series, completed indicates that if there is an associated project, it is completed. Citation: California Government Code, Section 34090

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DEPARTMENT: Community Development/Planning						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
13.	General Plan Records: Agendas and minutes (file copies) Agenda reports Comments Correspondence and supporting data Environmental documents Mailing lists Maps, plans and drawings Notices (file copies) Reports and studies Resolutions and ordinances (file copies)	S	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
14.	Interpretations	CL+3	P	P	H	Citation: California Government Code, section 34090
15.	Land Divisions	CL+4-3	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
16.	Lot Line Adjustments	CL+4-3	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090

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C,H,V CODES: C = Confidential H = Historical V = Vital

DEPARTMENT: Community Development/Planning						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
17.	Oak Tree Permits	CL+3	4	CL+5	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
18.	Organizations Files – Civic, Government, Professional: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	This record series is for records of general communications with organizations and agencies that the Department corresponds with. This series is not for project or activity-specific records. Citation: California Government Code, Section 34090
19.	Outdoor Dining Permit	CL+3	P	P	H	Citation: California Government Code, section 34090
20.	Parcel Maps	CL+5	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
21.	Planning Commission Agendas: Declarations of posting Original agendas	P	-	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
22.	Planning Commission Meetings - Audio Tapes	1	-	1	-	Citation: California Government Code, Section 34090.7

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DEPARTMENT: Community Development/Planning						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
23.	Planning Commission Meetings – Video Tapes	1	-	1	-	Citation: California Government Code, Section 34090.7
24.	Planning Commission Minutes	P	-	P	V,H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
25.	Planning - Planning Commission Notices: Notices of hearings Proof of publication documentation	5	-	5	-	Citation: California Government Code, Section 34090
26.	Planning - Planning Commission Packets: Agendas (file copies) Agenda reports (file copies; originals in project files) Correspondence/supporting data (file copies)	5	-	5	-	Citation: California Government Code, Section 34090
27.	Planning - Planning Commission Resolutions	P	-	P	V,H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090

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DEPARTMENT: Community Development/Planning						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
28.	Planning - Planning Department Reference Collection: Budget Chronological (chron) files Legislation Planning publications/periodicals Planning texts (guides, procedures, reference) Population Reference copies of City documents (EIR's, General Plan reports, project reports and studies. Official copies are in the Project Files.) Regional Planning Reports and studies from outside sources (other cities, agencies, organizations)	2	-	2	-	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
29.	Planning - Project Files (Conditional Use Permits): Agreements (file copies) Applications and supporting data Consultants'/Staff reports and studies Correspondence and supporting data Environmental documents Fees and receipts Mailing lists Maps, plans and drawings Notices (file copies) Permits Planning Commission minutes (file copies) Planning Commission transcripts Resolutions and ordinances (file copies) Site review	C+5 3	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090

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DEPARTMENT: Community Development/Planning						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
30.	Pre-Applications Pre-Screen Review	CL+4-3	4	CL+5	H	Citation: California Government Code, Section 34090
31.	Planning - Public Information Materials (Front Counter): Applications and checklists Blank forms Consultants lists Fees schedules Maps, plans and drawings (public viewing copies) Ordinances (copies) Procedures and guidelines Reports and studies (distribution/sales copies) Reports and studies (reading copies) Zoning standards	2+AR	-	2+AR	-	Citation: California Government Code, Section 34090.7
32.	Sign Permits	CL+4-3	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
33.	Site Plan Review	CL+4-3	P	P		This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090

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DEPARTMENT: Community Development/Planning						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
34.	Specific Plan Documents (i.e.; Agoura Village, Ladyface Mountain, etc.)	CL	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
35.	Specific Projects	CL	P	P	-	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
36.	Surveys* (i.e.; child care, general plan, etc.) <i>*Specific project surveys maintained with project file(s)</i>	S	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
37.	Temporary Use Permits See 'Project Files (Conditional Use Permits)' for representative file contents.	<u>CL+1-3</u>	2	CL+3	H	Citation: California Government Code, Section 34090
38.	Tract Maps	<u>CL+5-3</u>	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
39.	Variances (Includes Amendments or Modifications)	<u>CL+1-3</u>	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090

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DEPARTMENT: Community Development/Planning						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
40.	Zoning Changes/General Plan Amendments	CL+13	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
41.	Zoning Ordinance Amendment	P	P	P	H	Citation: California Government Code, Section 34090

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Community Services/Parks/Recreation						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	Accident and Incident Reports	2	3	5	-	Citation: California Government Code, Section 34090
2.	Brochures Advertisers Files: Camera-ready copy Check copies Correspondence Requests Supporting data	2	-	2	-	Citation: California Government Code, Section 34090
3.	Brochures Artwork: Original artwork (camera-ready copy) used to produce Department brochures	CL+2	-	CL+2	H	Includes hard copy and files on computer. For this record series, CL (Closed/Completed) represents production of final brochure. Citation: California Government Code, Section 34090
4.	Community Services Advisory Committee Agendas and Minutes	CL	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
5.	Correspondence Chronological Files	2	-	2	-	Correspondence Chronological files are files containing copies of internally generated correspondence and memos. These copies are filed in chronological order for quick access and retrieval. Citation: California Government Code, Section 34090

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DEPARTMENT: Community Services/Parks/Recreation

Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
6.	Facilities Reservation Forms	2	-	2	-	Citation: California Government Code, Section 34090
7.	History Files: Brochures Department publications Flyers Photos binders Press releases Publicity binders	CL	P	P	H	Citation: California Government Code, Section 34090
8.	Organizations Files – Civic, Government, Professional: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	This record series is for records of general communications with organizations and agencies that the Department corresponds with. This series is not for project or activity-specific records. Citation: California Government Code, Section 34090
9.	Personnel - Instructor Contracts	E+ 2	-	E+ 2	-	Citation: California Government Code, Section 34090
10.	Program Evaluations (Class Evaluations)	2	-	2	-	Citation: California Government Code, Section 34090
11.	Program Proposals Files: Correspondence Promotional materials Resumes Sample program materials	2	-	2	-	This record series is for materials received by the Department from instructors presenting proposals for programs, classes, etc. Citation: California Government Code, Section 34090
12.	Program Registrations/Waivers of Liability	5	-	5	-	Citation: California Government Code, Section 34090 Citation: Code of Civil Procedures, Sections 337 and 338

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DEPARTMENT: Community Services/Parks/Recreation

Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
13.	<p>Programs Files (City-Participation):</p> <ul style="list-style-type: none"> Audit reports (if audited) Budgeting data Completion documentation (release from funding agency) Contracts/agreements for supplies and services (vendors and suppliers - copies) Correspondence and memos Correspondence with funding agency Invoices for services and supplies (copies; official is in Finance) Itineraries/schedules Program development materials Program financial reports (to funding agency) Program progress reports (to funding agency) <p>Programs Files (City-Participation), continued...</p> <ul style="list-style-type: none"> Program rules and procedures Promotional materials (press releases, flyers) Supporting data 	CL+1	4	CL+4	-	<p>Includes programs, special events, activities, courses, and classes where Community Services receives funding and program direction from external organizations. This includes grant-funded programs and other special fund distributions. Community Services administers the program at the local level, but follows rules and procedures specified by the funding agency. For this record series, CL (Closed/Completed) represents completion of all terms of the funding agreement with the funding agency, including audit and release if specified.</p> <p>Citation: California Government Code, Section 34090</p>

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DEPARTMENT: Community Services/Parks/Recreation						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
14.	Programs Files (City-Sponsored): Budgeting data Contracts/agreements for supplies and services - vendors and suppliers (copies) Correspondence and memos Invoices for services and supplies (copies) Program development materials, including: Budgeting Facilities/equipment research Promotional materials (press releases, flyers) Reference materials Staffing	CL+1	4	CL+5	-	Includes programs, special events, activities, courses, and classes developed, sponsored and administered by Community Services. See Programs Files (City-Participation) for programs in which Community Services receives funding and program direction from external sources/organizations. Citation: California Government Code, Section 34090
15.	Recreation Registration Database Records: Program data (active) Program data (inactive/historical) Registrant data (active)	2	-	2	-	Citation: California Government Code, Section 34090
16.	Special Events Files: Correspondence and supporting data Maps, plans and drawings Permits/applications Requests	CL+2	-	CL+2		Includes parades, block parties, picnics, celebrations, sporting events, etc. Citation: California Government Code, Section 34090

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DEPARTMENT: Community Services/Parks/Recreation						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Finance Department						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	1099's Files: 1099's (City Copies) Correspondence and backup data Procedures, rules and reference materials Verifications reports	3	2	5	-	Citation: California Government Code, Section 34090
2.	Accounting System Backup Tapes/Disks	2	-	2	V	Computer System Backup Tapes contain same data. This set is a second, vital records backup of specific data, backed up at fiscal year end. Citation: California Government Code, Section 34090
3.	Accounts Payable Files: Copies of check stubs and checks Correspondence and backup data Invoices Purchase orders	A	5	A+5	-	Before destruction occurs, these files should be reviewed to determine if they are required for support of grants or other funding programs whose retention requirements exceed those of audit plus 5 years. Citation: California Government Code, Section 34090
4.	Audit Files (Work Files): Audit reports (work copies) Correspondence Financial statements (work copies) Worksheets and backup data	5	-	5	V	Final audit reports are held by City Clerk's Office. Citation: California Government Code, Section 34090.7

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DEPARTMENT: Finance Department						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
5.	Audit and Tax Reports to State Agencies: Correspondence Final reports Procedures for preparation Source materials and backup data	10	-	P	-	Citation: California Government Code, Section 34090
6.	Bank/Account Records: Accounts - general information Account statements Correspondence and backup data Signature authorizations	A	5	A+5	-	Citation: California Government Code, Section 34090
7.	Bank Deposits Files: Check copies Deposit receipts Deposit tickets copies	A	5	A+5	-	Also called Receipts or Cash Receipts. Citation: California Government Code, Section 34090
8.	Bank Reconciliation Files: Bank statements (notated) Cash balance reports Check register reports General ledger reports Voided check registers/voided checks Worksheets and backup data	A+ 2	-	A+ 2	-	Citation: California Government Code, Section 34090

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DEPARTMENT: Finance Department						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
9.	Bank Statements Records: Canceled checks Statements	A	5	A+5	-	Before destruction occurs, these files should be reviewed to determine if they are required for support of grants or other funding programs whose retention requirements exceed those of audit plus 5 years. Citation: California Government Code, Section 34090
10.	Budget Development Files: Correspondence and backup data Department budget submissions Salary surveys Worksheets and analyses	2	-	2	-	Final, official budget document is held by City Clerk Department. Citation: California Government Code, Section 34090
11.	Business Registration	E+4	E+4	E+4		Citation: California Government Code, Section 34090
12.	Correspondence Chronological Files	2	-	2	-	Correspondence Chronological files are files containing copies of internally generated correspondence and memos. These copies are filed in chronological order for quick access and retrieval. Citation: California Government Code, Section 34090
13.	Credit Card Service Provider Administrative Files: Agreements with credit card service provider (copies; original in City Clerk) Correspondence Procedures Supporting data	CL+2	-	CL+2	-	For this record series, CL (Closed/Completed) represents completion of agreement with credit card service provider. Citation: California Government Code, Section 34090

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DEPARTMENT: Finance Department						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
14.	Daily Cash Receipts Correspondence and backup data Franchise fees Revenues reports and studies State and local sources Sales tax revenue Transient Occupancy Taxes	A	5	A+5	-	Citation: California Government Code, Section 34090
15.	Financial Reports (Year-end Printouts): Balance sheets Cash balance reports Detail reports General ledger reports Revenue/expense reports	2	P	P	H	Citation: California Government Code, Section 34090
16.	Information Systems - Computer System Backup Tapes	1-2 wk	-	1-2 wk	-	Tapes contain operational (not archival) backups of data on the City's NT Network computer system. The system is backed during posting, which may be once or twice/week. Six tapes are used and rotated.
17.	Local Agency Investment Fund (LAIF) Records: Correspondence Fund reports Fund statements	2	-	2	-	Citation: California Government Code, Section 34090

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DEPARTMENT: Finance Department						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
18.	NSF Files: Bounced checks Correspondence and notes	A	-	A	-	Citation: California Government Code, Section 34090
19.	Organizations Files – Civic, Government, Professional: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	This record series is for records of general communications with organizations and agencies that the Department corresponds with. This series is not for project or activity-specific records. Citation: California Government Code, Section 34090
20.	PERS Report	P	P	P	-	Citation: California Government Code, Section 34090
21.	Payroll - Employee Time Records: Time sheets (originals) Vacation sick leave schedules	CL+4		CL+4	-	Citation: 29 CFR 516.2 - 516.6 C+4, date of entry, or resolution of all issues, whichever is later.
22.	Payroll - Payroll Reports: Auto deposit registers Deductions registers Month to date tax limits Monthly payroll summaries Payroll registers Personnel planning reports Year-to-date reports	2	4	A+5	-	Citation: 26 CFR 31.6001-1

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DEPARTMENT: Finance Department						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
23.	Payroll - Payroll Tax Reports: Correspondence Fees statements Payroll tax statements - quarterlies Tax information and backup data	2	4	6	-	Citation: 29 USC 436
24.	Payroll - W-2's Records: Correspondence and backup data W-2 (City copies) W-2 control reports	6	0	6	-	Citation: 29 CFR 516.2 - 516.6
25.	Post Office/Bulk Mail Receipts	2	-	2	-	Citation: California Government Code, Section 34090
26.	Property Tax Revenue Records: Assessed values totals statements	P	-	P	H	Citation: California Government Code, Section 34090
27.	Property Tax Revenue Records: Communications with Los Angeles County Assessor Correspondence and backup data Reports and Studies	A	5	A+5	-	Citation: California Government Code, Section 34090
28.	Purchase Orders Purchase order logs	2	-	2	-	Citation: California Government Code, Section 34090

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DEPARTMENT: Finance Department						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
29.	Revenue Records - Utility Users Taxes: Correspondence Tax remittance reports	A	5	A+5	-	The City receives no income at present. Citation: California Government Code, Section 34090
30.	Warrant Registers (Invoice Approval Lists)	A	-	A	-	Official copy in City Clerk's Office is scanned onto Optical System with Council Agenda Packet for permanent retention. Citation: California Government Code, Section 34090

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Public Works						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	Administration – Copies or Duplicate Records: Chronological (chron) files Deeds (copies) L.A. County Fire Department (general) L.A. County Police Department (general) Las Virgenes Unified School District (general) Ordinances and Resolutions (copies) Recorded documents (copies) Redevelopment (general)	C+2	-	C+2	-	Citation: California Government Code, Section 34090
2.	Capital Improvement Projects (CIP) Plans & Drawings: Final, as-built plans and drawings	P	-	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
3.	Correspondence Chronological Files	2	-	2	-	Correspondence Chronological files are files containing copies of internally generated correspondence and memos. These copies are filed in chronological order for quick access and retrieval. Citation: California Government Code, Section 34090
4.	Federal Highway Administration Funding (FHWA) Administrative Files: Applications/funding requests and supporting data Budgeting analyses Correspondence w/ local administrative agencies (including CALTRANS, DOT, LACTC, MTA, RTD) Studies & reports (Ventura and Los Angeles Counties) Supporting data	CL	3	CL+3	-	For this record series, CL (Completion) represents date of last expenditure report or resolution of all issues. Citation: 49 CFR 18.42 and/or 29 CFR 5.5

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DEPARTMENT: Public Works						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
5.	Grants/Funding Files: Applications and supporting data Contracts, amendments and supporting data (copies) Correspondence and supporting data Financial/budgeting data Program completion documentation Reports to funding agency Rules, regulations and procedures	C+1	2	C+3	-	For this record series, CL (Completion) represents date of last expenditure report , or until resolution of all issues arising from litigation, claim, audit, or other action involving the records, whichever is later. Citation: 29 CFR 97.42
6.	Intersections/Streets/Signals	P	-	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
7.	Maps - Final, recorded maps, including: Assessment districts Construction (final, as-constructed only) Improvement plans Lot line adjustments, Lot Tie, Lot Split Parcel maps Record of survey Sewer Maps and Indexes Subdivision maps Tract maps Utilities – storm drain	P	-	P	H,V	Final maps, plans, drawings & blueprints are also recorded with the County Assessor. City flat files -- incomplete; as of this schedule, developers/applicants are required to submit copies of final recorded maps. Citation: California Government Code, Section 34090

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DEPARTMENT: Public Works						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
8.	NPDES - Program Files Correspondence and supporting data Program rules, regulations & procedures Reports & studies	P	-	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Because this program may result in the creation of an assessment district, this record series retention is the same as a special assessment district. Citation: California Government Code, Section 34090
9.	Operations & Maintenance (O&M) Projects Files: Correspondence and supporting data Service requests	2	-	2	-	O&M Projects are those projects that the City contracts out to private contractors or that are undertaken by City maintenance crews. Citation: California Government Code, Section 34090
10.	Organizations Files – Civic, Government, Professional: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	This record series is for records of general communications with organizations and agencies that the Department corresponds with. This series is not for project or activity-specific records. Citation: California Government Code, Section 34090
11.	Parks General Landscape Medians Landscaping Parks Tree Plaques	P	P	P	H	Citation: California Government Code, Section 34090

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DEPARTMENT: Public Works						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
12.	Public Works - Performance Bonds/Labor and Materials Bonds: Backup data Labor and materials bonds Performance bonds	C+1	1	C+2	-	These files are physically located in the City Clerk's Office (vault). Citation: California Government Code, Section 34090
13.	Traffic Collision Reports	2	-	2	-	Citation: California Government Code, Section 34090
14.	Utilities General Metricom Overhead/Underground Pac Bell SCE Sewers Water	P	P	P	H	Citation: California Government Code, Section 34090

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Public Works/Building & Safety						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	Building & Safety -Address Files: Building permits Certificates of occupancy Correspondence and backup data Drawings Electrical permits Geology reports Heating/ventilation/A.C. permits Inspections record sheets Plumbing permits Sign permits Soils reports Substandard Housing Abatement	P	-	P	V	Some of these files have been microfilmed and should be transferred to optical disk media. Citation: California Government Code, Section 34090
2.	Building & Safety - Counter Manual: Fee schedules Procedures and instructions	P	-	P	-	Citation: California Government Code, Section 34090
3.	Building & Safety - Disaster Response Program Files: Disaster response plan Emergency Operations Center (EOC) Records Resources/contacts lists	S+2	-	S+2	V	Citation: California Government Code, Section 34090

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DEPARTMENT: Public Works/Building & Safety						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
4.	Building & Safety - Earthquake Records – Emergency Operations Center (EOC) Records Inspections/Address Log: Logs of earthquake Inspections performed throughout the City	CL+2	-	CL+2	-	For this record series, CL (Closed/Completed) represents final FEMA audit. Citation: California Government Code, Section 34090
5.	Building & Safety - Plan Review Files Building permits Certificates of occupancy Correspondence and backup data Drawings Electrical permits Heating/ventilation/A.C. permits Inspections record sheets Plumbing permits Sign permits Substandard Housing Abatement	CL	-	CL	-	These are temporary files which are transferred into Address files upon completion of project.
6.	Building & Safety - Plans and Drawings (Commercial Structures): Final, approved plans and drawings	CL	T	T	CL	For this record series, CL (Closed/Completed) represents issuance of certificate of occupancy. T (Termination) represents life of the building (plans and drawings may be destroyed upon building demolition). Citation: California Health and Safety Code, Section 19850

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DEPARTMENT: Public Works/Building & Safety						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
7.	Building & Safety - Plans and Drawings (Residential Structures - single or multiple dwellings) Final, approved plans and drawings Remodel Plans and drawings (addition, deck, pool, retaining wall, etc.)	CL	T	T	CL	For this record series, CL (Closed/Completed) represents issuance of certificate of occupancy. T (Termination) represents life of the building (plans and drawings may be destroyed upon building demolition). Citation: California Health and Safety Code, Section 19850
8.	Building & Safety - Plans and Drawings Miscellaneous Nonstructural plans and drawings: <ul style="list-style-type: none"> • <u>Outdoor</u> Fireplaces, BBQs, and Fire Pits. • Pilasters and garden walls/fences <u>under 6' high</u> • <u>Window change outs</u> • Plumbing fixture <u>change outs</u> • Small electrical and plumbing <u>repairs</u> • <u>Minor non-structural</u> remodels • <u>Repairs</u> to Patios, Gazebos, Pergolas and Carports 	2	-	2	-	This record series is for records of miscellaneous minor or nonstructural plans and drawings. Citation: California Health and Safety Code, Section 19850
9.	Correspondence Chronological Files Sign-In Sheets	2	-	2	-	Correspondence Chronological files are files containing copies of internally generated correspondence and memos. These copies are filed in chronological order for quick access and retrieval. Citation: California Government Code, Section 34090

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DEPARTMENT: Public Works/Building & Safety						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
10.	Disaster Incidents Files: Correspondence Council approvals/documentation (copies) Damage reports/assessments and supporting data Invoices Photographs	A	5	A+5	-	This record series is for files documenting disaster incidents damages and claims for reimbursement from agencies such as FEMA and OES. Citation: California Government Code, Section 34090
11.	Engineering - Grading Bonds and Releases: Bond documents and supporting data Bond release letters	CL+1	P	P	H	For this record series, CL (Closed/Completed) represents exoneration of a grading bond. Citation: California Government Code, section 34090
12.	Engineering - Grading Permits	CL+1	P	P	H	For this record series, CL (Closed/Completed) represents completion of a grading project. Citation: California Government Code, section 34090
13.	Organizations Files – Civic, Government, Professional: Backup data Correspondence and memos Publications Reports and studies	2	-	2	-	This record series is for records of general communications with organizations and agencies that the Department corresponds with. This series is not for project or activity-specific records. Citation: California Government Code, Section 34090

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Public Works/Engineering						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	<p>Capital Improvement Project (CIP) Files:</p> <p>Change orders files, including:</p> <ul style="list-style-type: none"> Change orders Change order requests Correspondence and supporting data Cost estimates Review documentation <p>Contractor files, including:</p> <ul style="list-style-type: none"> Bonds (copies) Contracts, amendments and supporting data (copies) Correspondence and supporting data Insurance documentation (copies) <p>Consultant files, including:</p> <ul style="list-style-type: none"> Contracts, amendments and supporting data (copies) Correspondence and supporting data Meeting notes <p>Design records, including:</p> <ul style="list-style-type: none"> Design research and survey data Calculations Drawings; Right-of-Way Documentation - Deeds, Quitclaims, Easements (copies) Correspondence and supporting data <p>Payments files, including:</p> <ul style="list-style-type: none"> Correspondence and supporting data 	C+1	9	C+10	-	<p>Files are retained for completion of the project and all terms of the project contracts and agreements, plus 10 years. At that time, the files will be evaluated by the department. If the structure still exists, or if the files have historical value, or if the files are needed for City operations, they will be retained for an additional time period.</p> <p align="center">Citation: California Code of Civil Procedure, Section 337.15, S/L</p> <p>Citation: California Government Code, Section 34090</p>

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Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
	Payments files, continued - Inspections files/Daily inspectors' reports Progress payments (copies) Project studies and reports Purchase orders and invoices (copies) Permit files, including: Applications and backup data Permits issued Prevailing Wages/State Industrial Relations Registrations	P S+2	P S+2	P S+2		Citation: California Government Code, Section 34090
2.	Consultants/Suppliers/Vendors information: Brochures Catalogs Correspondence Promotional materials Samples	2+AR	-	2+AR	-	No obligation to retain unsolicited promotional material - only the materials kept in the ordinary course of business.
3.	Correspondence Chronological Files	2	-	2	-	Correspondence Chronological files are files containing copies of internally generated correspondence and memos. These copies are filed in chronological order for quick access and retrieval. Citation: California Government Code, Section 34090

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DEPARTMENT: Public Works/Engineering						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
4.	<p>Land Development Projects Files:</p> <ul style="list-style-type: none"> Agreements (copies) Correspondence and memos Covenants (copies) Easements (copies) Evaluation estimates Final maps (surrounding and underlying) Memorandums of Understanding (MOU) Permits (copies) Plan check documentation Plans and drawings <p>Land Development Projects Files, continued -</p> <ul style="list-style-type: none"> Plans, drawings, and blueprints Reports and studies Reviews and comments Reyes Adobe Interpretive Plan Supporting data Title reports (copies) 	C+1	P	P	H	<p>This record series will be archived onto the City's optical imaging system for permanent retention.</p> <p>Land Development Projects include grading plans, street improvement plans, storm drain plans, landscaping plans, lot line adjustments, and plan checks.</p> <p>Citation: California Government Code, Section 34090</p>
5.	<p>Land, Surplus</p> <ul style="list-style-type: none"> Surplus Land Surplus Property 	P	P	P	-	<p>Citation: California Government Code, Section 34090</p>
6.	<p>Organizations Files – Civic, Government, Professional:</p> <ul style="list-style-type: none"> Backup data Correspondence and memos Publications Reports and studies 	2	-	2	-	<p>This record series is for records of general communications with organizations and agencies that the Department corresponds with. This series is not for project or activity-specific records.</p> <p>Citation: California Government Code, Section 34090</p>

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DEPARTMENT: Public Works/Engineering						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
7.	Permits: Encroachment permits Excavation permits	C+1	P	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090

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CITY OF AGOURA HILLS RECORDS RETENTION/DESTRUCTION SCHEDULE

DEPARTMENT: Public Works/Parks						
Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
1.	Park Master Plans Files: Agenda reports Comments Correspondence and supporting data Environmental documents Reports and studies Maps, plans, and drawings Notices (file copies)	P	-	P	H	This record series will be archived onto the City's optical imaging system for permanent retention. Citation: California Government Code, Section 34090
2.	Parks/Facilities Construction Projects Files: Bonds and insurance documentation (copies) Contracts, amendments and supporting data (Original Contracts are in City Clerk Dept.) Correspondence and supporting data Accounting/Payments files (copies), including: Certified payroll files Contractor invoices Correspondence and supporting data Progress payments/approvals Inspections and acceptance documentation Project studies and reports Design records, including: Calculations City Council documentation (copies) Correspondence and supporting data Design research data Drawings Plans and drawings	C+1	9	C+10		Files are retained for completion of the project and all terms of the project contracts and agreements, plus 10 years. At that time, the files will be evaluated by the department. If the structure still exists, or if the files have historical value, or if the files are needed for City operations, they will be retained for an additional time period. Citation: California Code of Civil Procedure, Section 337.15

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DEPARTMENT: Public Works/Parks

Item No.	RECORD SERIES TITLE AND CONTENTS	RETENTION DISPOSITION			C,H,V	NOTES
		OFFICE	INACTIVE	TOTAL		
	Parks/Facilities Construction Projects Files, continued: Progress reports Project notes, worksheets and analyses Right-of-way documentation (copies) Survey data					

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