

To: Mayor and City Council

From: Alison Foulis, City Clerk  
Emily Longfellow, City Attorney

**Subject: Approve amendments to the City of Belvedere Administrative Policy Manual Part 7, City Records Management**

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**Recommended Motion/Item Description**

Approve amendments to the City of Belvedere Administrative Policy Manual Part 7, City Records Management.

**Background**

The City of Belvedere’s records management program policies and procedures were last reviewed in 2011. In addition to renumbering the policies and sections contained in Part 7 of the Administrative Policy Manual for consistency with the revised numbering scheme, the following changes are proposed:

***Policy 7.1 – Records Management Program***

Changes to this Policy, formerly Chapter 60 – Records Policy and Laserfiche Protocol, include renaming to “Records Management Program,” minor Laserfiche archiving process adjustments, and moving sections related to Email and Voice Mail, and Laserfiche System Administration and Security to their own, separate policies.

***Policy 7.2 – Email, Voice Mail, and Other Electronic Communications***

The revised language of this Policy also addresses the retention and storage of email and other electronic communications determined to be a public record, and the use of email and other electronic communications by City employees and officials.

A “public record” under the Public Records Act, is any writing containing information related to the conduct of the public’s business that is prepared, owned, used, or retained by a city, regardless of its physical characteristics. (Gov. Code, § 6262(e).)

The Court in *City of San Jose v. Superior Court* (2017) 2 Cal.5th 608, confirmed that electronic communications, including email and text messages, may constitute a public record regardless of whether the record is sent or received on a private electronic device, if they substantively relate to the conduct of the public’s business. Communications that are primarily personal in nature are not covered.

First, the proposed Policy ensures compliance with State record retention law while aligning it with common municipal practice throughout California. Currently, the City’s email system retains

all email sent or received by a City email account that have not been deleted or retained elsewhere by the user for the lifespan of the account. Per the current retention schedule, emails are to be retained for 10 years for employees and 5 years for members of a legislative body. However, the Government Code requires all municipalities to maintain public records only for a minimum of two years, or 90 days in some instances. (Gov. Code, 34090.) Thus, the City's current retention is far longer than legally required and beyond the practice of other California Cities.

The proposed revised policy provides a retention of 2 years for emails determined to be a public record that are not retained for some longer period as required by another category of the records retention schedule. Upon adoption of the revised retention schedule, the City Clerk and I.T. Coordinator will develop an implementation plan for all officials with a City email account.

Second, the policy revisions provide guidance for City employee and City official use and management of email accounts and other electronic communications, and the use of personal electronic devices. Noted above, any communication to or from a City official or employee related to the public's business constitutes a disclosable public record. This is true regardless of whether the communication originated or was sent to a personal account or on a personal device. (*City of San Jose.*)

All City employees, and members of the City Council and Planning Commission, are provided with a City email account, which should be exclusively used for the conduct of City business. Use of a private email account or other electronic communication (including texting) is discouraged. Email sent or received on a personal account must be forwarded to a City account. Members of City Commissions that are not assigned a City email account may use a personal account, but must otherwise comply with the policy.

Each individual is responsible for managing his or her own email account and reviewing communications to determine whether they constitute a public record and must therefore be retained. Mentioned above, a public record includes any communication that relates in some substantive way to the conduct of the City's business. The City Clerk or City Attorney may assist in determining what qualifies as a public record.

If a communication constitutes a public record, it must be saved to an appropriate project folder, a separate electronic folder, or otherwise retained per the timelines in the Policy. To ensure efficiency, each individual should regularly delete all electronic communications that do not constitute a public record.

If the City receives a Public Records request, the City Clerk shall forward the request to the appropriate City official or employee. Each individual will then be required to search his or her own electronic communications for responsive documents, which should be promptly returned to the City Clerk.

***Policy 7.3 – Laserfiche System Administration & Security***

Changes to this policy reflect the current practices of the Laserfiche Administrator. As noted in the "Authority" section of the header, any future changes to the procedures laid out in this Policy may be made by the City Manager.

***Policy 7.4 – Personnel Records & Retention Schedule***

Revisions to this policy include updating the job titles of the employee responsible for personnel file maintenance and adding a reference to recently adopted Belvedere Administrative Policy 9.2, “Personnel Files,” (approved 12/14/2018), for details on personnel file access and content.

***Policy 7.5 – Records Retention Schedule***

The changes recommended to the retentions schedule are:

<b>Record Category</b>	<b>Current Retention</b>	<b>Revised Retention Recommended</b>
Email of City Employees or Members of Legislative Bodies not otherwise retained under another category in the retention schedule.	5 – 10 years	Email older than 2 years will be auto-deleted from email system. A destruction authorization would not be required.
Personnel files of City Employees	2 years after date of termination of employment.	3 years after date of termination of employment per California Labor Code § 1198.5(c).
Planning Department plans – approved or denied.	Paper original, permanently	Paper original or Laserfiche, permanently.
Planning Department plans – withdrawn	Paper original, retention or destruction at the discretion of the Dept. Head.	Paper original or Laserfiche, retention or destruction at the discretion of the Dept. Head.
Voice Mail – substantive voice mails received by City Employees & Members of Legislative Bodies not otherwise retained under another category in this retention schedule.	Either transcript or detailed synopsis – 2 years.	Laserfiche or original of audio file, transcript, or detailed synopsis – 2 years.

***Policy 7.6 – Records Requests***

No changes have been made to the content of this policy, however future revisions may be made under the authority of the City Manager.

***Policy 7.7 – Contact Information for Public Officials***

The history of this policy is unclear on whether it was approved by the City Council or developed by staff based on current and best practices. No content changes have been made, however future revisions may be made under the authority of the City Manager.

**Recommendation**

Approve amendments to the City of Belvedere Administrative Policy Manual Part 7, City Records Management.

**Attachments**

Resolution.

**CITY OF BELVEDERE**

**RESOLUTION NO. 2019-**

**A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF BELVEDERE  
AMENDING THE BELVEDERE ADMINISTRATIVE POLICY MANUAL  
PART 7, "RECORDS MANAGEMENT"**

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**WHEREAS**, Belvedere Administrative Policy Manual Part 7 "Records Management" provides guidance for the evaluation, retention, and related timelines for City public records and documents in compliance with State law; and

**WHEREAS**, amendments to Part 7 "Records Management" have been proposed, as set forth in Exhibit A hereto, that provide updates to the Policy addressing issues including record retention schedules, and the use and management of City emails and electronic communications (the "Administrative Policy Amendments"); and

**WHEREAS**, on March 11, 2019, the City Council held a public meeting on the Administrative Policy Amendments and considered all information in the record including public testimony at the hearing; and

**WHEREAS**, at said meeting based on all information in the record, the City Council voted to approve of the Administrative Policy Amendments; and

**WHEREAS**, the City Council finds that the Administrative Policy Amendments are categorically exempt from the California Environmental Quality Act ("CEQA") under CEQA Guideline section 15061(b)(3) (common sense exemption), because it can be seen with certainty that there is no possibility that the proposed Administrative Policy Amendments could have a significant environmental effect.

**NOW, THEREFORE, BE IT RESOLVED** by the City Council of the City of Belvedere that Part 7, City Records Management, of the City of Belvedere Administrative Policy Manual is hereby revised and adopted read as presented in Exhibit A.

**PASSED AND ADOPTED** at a regular meeting of the City Council of the City of Belvedere on \_\_\_\_\_, by the following vote:

**AYES:**  
**NOES:**  
**ABSENT:**  
**ABSTAIN:**

**APPROVED:** \_\_\_\_\_  
Robert McCaskill, Mayor

**ATTEST:** \_\_\_\_\_  
Alison Foulis, City Clerk

# **Part 7. City Records Management**



CITY OF BELVEDERE – ADMINISTRATIVE POLICY MANUAL

**POLICY 7.1**

**RECORDS MANAGEMENT PROGRAM**

<b>Adoption Date:</b>	1/10/2006	<b>Adopted by:</b>	City Council motion
<b>Revised Date:</b>	-	<b>Revised by:</b>	-
<b>Authority:</b>	City Council		

**7.1.1 DEFINITIONS**

- A. State’s Definition Of “Public Record”:
  - I. CGC 6252.(E), (FG)
  - II. CEC 250.
  - III. CGC 6200.
  
- B. Definition of “duplicate”: CEC 255.
  
- C. Laserfiche Definitions:
  - I. Laserfiche volumes which have been exported to non-rewritable cd’s or to other permanent, immutable electronic format, shall be referred to as “archival volumes.”
  - II. The disks themselves shall be referred to as “storage media.”
  
- D. Definition of “original” or “record” copy:
  - I. CEC 255.
  - II. CGC 34090.5, 34090.7.
  - III. When choosing among identical editions of a document, the one designated the “record copy” shall be, in descending order:
    - 1. The image on a Laserfiche archival volume.
    - 2. Signed document with an original signature.
    - 3. Photocopy of signed document.
    - 4. Facsimile of signed document.
    - 5. Documents with imprinted signatures.
    - 6. Sharpest, cleanest printed copy in a paper file.
    - 7. Sharpest, cleanest photocopy in a paper file.
    - 8. Print of an electronic document which has been verified as a final draft by the document creator.
  
- E. Records which are considered drafts and which cannot be certified as an original, the record copy, or a reproduction of a record copy:
  - I. Letters with a blank signature block.
  - II. Word processing, spreadsheet, and other files stored on a personal computer, server, diskette or cd, unless a copy is produced and the creator of the document verifies that it is identical to the original final draft.
  - III. When entering documents into Laserfiche, if a record copy cannot be identified

with surety, or if the person scanning has reason to doubt that the document is a final draft or that it was ever published, the scanner must add a note to that effect in the “notes” or “subject” field of the template card attached to the file. Such a file may be used for reference only and prints made from it cannot be certified by the city clerk as true and exact copies of a record copy.

### **7.1.2 FILING AND RETENTION OF CORRESPONDENCE**

- A. Record copies of letters and memos are photocopies of the original, or Laserfiche images of the original, as it was published (i.e. on letterhead and signed).
- B. A record copy should be made of all outgoing correspondence and either placed in the sender’s physical chronological correspondence file, or scanned into the sender’s Laserfiche chronological file. (This is in addition to copies made for a subject file, address file, project file, etc.)
- C. This protocol applies to correspondence generated by any public official, including city staff, city council and planning commission members, and members of volunteer city committees and commissions. The person generating the correspondence has the responsibility for ensuring that it is filed at city hall.

### **7.1.3 FILING AND RETENTION OF OTHER DOCUMENTS CREATED ON A P.C.**

- A. This protocol is vital for two reasons: it ensures the accessibility of these records to the public (required by CGC 6253 et seq.); and it avoids future confusion over whether or not a file is a draft or the final record copy.
- B. Finished documents must be retained in one of three ways:
  - I. Printed out and placed in a paper file accessible to staff and the public.
  - II. Printed out and then scanned into Laserfiche.
  - III. Imported ~~Sent~~ directly from the p.c. to Laserfiche. ~~via the Laserfiche snapshot function.~~
- C. Word processing, spreadsheet, and other electronic files may be saved to a computer hard drive or server while they are being created and revised. After the record copy has been published, the electronic file should either:
  - I. Deleted, if it is no longer needed.
  - II. Retained on the p.c. or server, but solely for the purpose of using it in future as boilerplate or as a starting point for a similar document.
- D. This protocol applies to documents generated by any public official, including city staff, city council and planning commission members, and members of volunteer city committees and commissions. The person generating the document has the responsibility for ensuring that it is filed at city hall.

## II. E MAIL AND VOICE MAIL

### A. Criteria for retaining or deleting e-mail and voice mail.

- I. Both incoming and outgoing e-mail and voice mail messages are retainable public records if they contain information relating to the conduct of the public's business.
- II. Messages which meet any of the following criteria must be retained:
  1. If there were no e-mail/voice mail, would this message likely have come to me in the form of a letter or memo?
  2. Is the message from a member of the public expressing an opinion or suggestion?
  3. Might another person need to know the contents of this?
  4. Will you or another person want to read or hear this message in the future?
  5. Is it a privileged communication to or from the city attorney's office?
  6. Does it touch on a lawsuit or potential lawsuit?
  7. Is it evidence of the fulfillment of some legal requirement?
  8. Is there anything material or substantive regarding the business of the city in the message.
  9. Does the message ask another staff member to follow up on a request?
  10. Does the message advise or instruct someone on city policy, procedure, or legal issues?
  11. Does the message record or document an action of significance?
- III. It is the responsibility of each public official to use common sense in judging which e-mails to retain. When in doubt, err on the side of retaining the message.

B. E-mails sent or received which qualify as public records should be immediately printed out and filed in the person's chronological correspondence file. If the message relates to a subject, address, or project file, a second copy should be filed there.

C. Voice-mails received in-house which qualify as public records should be forwarded to the mail box of the city employee designated to transcribe voice mail. Voice messages received through other means than the city's voice mail system shall be recorded by the official receiving it and the recording given to the employee designated as transcriptionist.

D. Outgoing voice mails should be recorded on tape and delivered to city hall for transcription. Or, if the sender writes out the message beforehand and reads it into the recipients recording machine, the written copy may be filed as the record copy.

E. Voice mail transcriptions shall be filed in the chronological correspondence file of the person receiving or sending the message. If the message relates to a subject, address, or project file, a second copy should be filed there.

F. These protocols apply to e-mail and voice mail received or generated by any public official, including city staff, city council and planning commission members, and members of volunteer city committees and commissions. The person generating or receiving the message has the responsibility for ensuring that it is placed in the files of city hall, in the manner prescribed above, with the least possible delay.

G. Due to the labor intensive nature of transcribing recorded voice messages, it is recommended that public officials discourage phone callers from leaving substantive messages on their voice mail system.



### III. LASERFICHE SYSTEM ADMINISTRATION & SECURITY.

#### A. Admin

- ~~I. The city manager shall appoint one person to be the Laserfiche “Administrator”.~~
- ~~II. The exclusive responsibilities & rights of the Laserfiche administrator, hereinafter called “Admin,” include, but are not limited to:
  - ~~1. Assigning user rights and access rights.~~
  - ~~2. Creating new volumes.~~
  - ~~3. Making a volume “read only.”~~
  - ~~4. Labeling storage media and placing it in secure storage.~~
  - ~~5. When necessary, retrieving storage media for re-attachment.~~
  - ~~6. Lifting the “read only” status of an archival volume to perform maintenance on the database.~~~~

#### B. Supervisor

- ~~I. The city’s computer systems administrator shall be designated as a Laserfiche “supervisor” to assist the Laserfiche Administrator.~~
- ~~II. Responsibilities delegated to the supervisor by the Admin may include, but are not limited to:
  - ~~1. Technical maintenance of the Laserfiche software and hardware.~~
  - ~~2. Installing software on pc’s and the server.~~
  - ~~3. Performing routine backups of the server.~~
  - ~~4. Exporting volumes to storage media.~~
  - ~~5. Re-attaching archival volumes to the database.~~
  - ~~6. Troubleshooting problems with the software.~~~~

~~C. The city manager may, in consultation with the admin and department head, designate one person in said department to be assigned the following rights exclusively for the Laserfiched files of that department:~~

- ~~I. Create new directory folders.~~
- ~~II. Create/delete/move/rename files.~~
- ~~III. Create new templates.~~

~~D. No one, other than the admin, is permitted to permanently delete Laserfiche files or pages from files. Users shall move test files, mistakes, and re-do’s to the trash bin directory for later clearance and deletion by the admin.~~

~~E. No one is permitted to add, delete, or alter files or pages in files that are part of an archival volume.~~

~~F. Records which are permitted to be destroyed after LaserFiching shall be retained until an archival volume is produced and the storage media has been safely stored off-site.~~

~~G. Any user scanning documents into Laserfiche shall place a green “lf” mark in the lower right hand corner of the document. When an entire file folder is scanned, a single mark may be placed on the file tab.~~

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CGC means California Government Code  
CCR means California Code Of Regulations  
CPC means California Penal Code  
CEC means California Evidence Code  
CCC means California Civil Code



CITY OF BELVEDERE – ADMINISTRATIVE POLICY MANUAL

**POLICY 7.2**

**EMAIL, VOICE MAIL, AND OTHER  
ELECTRONIC COMMUNICATIONS**

<b>Adoption Date:</b>	1/10/2006	<b>Adopted by:</b>	City Council motion
<b>Revised Date:</b>	-	<b>Revised by:</b>	-
<b>Authority:</b>	City Council		

**7.2.1      PURPOSE**

This policy governs the retention of email, other electronic communications, and voice mail, created, sent, received, forwarded, edited, stored, or otherwise used by City employees and officials in the conduct of City business.

**7.2.2      ELECTRONIC COMMUNICATION**

A. City Email Accounts

- All City employees and members of the City Council and Planning Commission shall be assigned a City email account. City email and email systems are intended to be a medium of communication and are not intended to be the electronic storage or maintenance of City records.
- City email accounts are solely for official use and shall not be used for personal business or other inappropriate conduct, including but not limited to chain letters, emails containing language which is insulting, offensive, disrespectful, demeaning, obscene, or sexually suggestive, or harassment of any form.

B. Electronic Communication Management; Public Records

- It is the responsibility of each individual to manage his/her email account and other electronic communications. Each individual must determine if an email or other electronic communication, whether sent or received, is a public record and must be retained pursuant to this Policy and the California Public Records Act. The City Clerk and/or City Attorney may assist in making such determinations. A public record includes any communication that relates in some substantive way to the conduct of the City's business. If a communication constitutes a public record, it must be saved to an appropriate project folder, a separate electronic folder, or otherwise retained.
- Emails and other electronic communications that are primarily personal in nature, constitute drafts of completed documents, are not related to the public's business, or not

otherwise required to be maintained by law and whose preservation is not necessary or convenient to the discharge of City business are not public records, and shall be deleted regularly and frequently.

- Emails and other electronic communications that qualify as public records must be retained for the same period as the record series that most closely matches the subject matter contained in the communication.
- Email residing on the City's email server that is not deleted or archived by the user may be stored for 2 years. All email bearing a date older than 2 years whether in a Mailbox, Sent Items, or any folder or sub-folder, regardless of agency, sender, recipient, or any other attribute, will be deleted automatically from the City's email system unless archived. This deleted email will not be retained on any Information Technology media or log. Electronic calendars will be excluded from this 2 year retention.
- City email accounts should be used to conduct City business. City officials and employees should not use personal email accounts or other personal electronic communications for the creation, transmission, or storage of communications regarding City business. In the event a City official is not assigned a City email account, such as a member of a City Commission aside from the Planning Commission, each individual may use a personal email account and shall otherwise be responsible for following the direction in this Section. The use of other electronic communications, such as texting, is discouraged.

B. Personal Electronic Communication Devices and Accounts

- If a City official or employee receives or sends an email or other electronic communication regarding City business on a non-City account, such communication shall either be: 1) copied ("cc'd") to the City account; or (b) forwarded to the City account as soon as feasible. The City official or employee shall endeavor to ask persons sending electronic communications regarding City business to a personal account to send the communication to the City account, and likewise shall endeavor to ask a person sending electronic communication regarding non-City business to use a personal account.
- In the event a private device is used to conduct City business, all City-related communication should be through a City email account, and not through text messaging, use of a personal email account, or any other personal electronic communication platform.
- In the event a Public Records Act request is received by the City seeking electronic communications, the City Clerk shall promptly transmit the request to the applicable City official(s) and/or employee(s) and communicate the scope of the information requested and applicable deadlines. It shall be the duty of each individual receiving such a request to promptly conduct a good faith and diligent search of his/her personal communication devices and computers, including private devices and computers, and all electronic communication accounts and platforms, for responsive electronic communications and/or documents. All responsive communications and/or documents shall be promptly transmitted to the City Clerk and/or City Attorney for review.

### **7.2.3      VOICE MAIL**

Any incoming voicemail messages forwarded to the City's email system in the form of an audio file should be deleted quickly and not stored in the e-mail system. Voicemails needing to be maintained because it constitutes an official City record should be saved to the appropriate project file as either an audio file or transcription of the message.



CITY OF BELVEDERE – ADMINISTRATIVE POLICY MANUAL

**POLICY 7.3**  
**LASERFICHE SYSTEM ADMINISTRATION & SECURITY**

<b>Adoption Date:</b>	1/10/2006	<b>Adopted by:</b>	City Council motion
<b>Revised Date:</b>	-	<b>Revised by:</b>	-
<b>Authority:</b>	City Manager		

**7.3.1 POLICY**

A. Administrator

- I. ~~The city manager shall appoint one person to~~ City Clerk shall be the Laserfiche “Administrator”.
- II. The exclusive responsibilities & rights of the Laserfiche administrator, hereinafter called “Admin,” include, but are not limited to:
  1. Assigning user rights and access rights.
  2. Creating new volumes.
  3. Making a volume “read only.”
  4. Labeling storage media and placing it in secure storage.
  5. When necessary, retrieving storage media for re-attachment.
  6. Lifting the “read only” status of an archival volume to perform maintenance on the database.
  7. Technical maintenance of the Laserfiche software and hardware.
  8. Installing software on pc’s and the server.
  9. Performing routine backups of the server.
  10. Exporting volumes to storage media.
  11. Re-attaching archival volumes to the database.
  12. Troubleshooting problems with the software.

~~B. Supervisor~~


- ~~I. The city’s computer systems administrator shall be designated as a Laserfiche “supervisor” to assist the Laserfiche Administrator.~~
- ~~II. Responsibilities delegated to the supervisor by the Admin may include, but are not limited to:~~

C. ~~The city manager~~ City Clerk may, in consultation with the ~~admin and~~ department head, designate ~~one person(s)~~ in said department to be assigned the following rights exclusively for the Laserfiche files of that department:

- I. Create new directory folders.
- II. Create/delete/move/rename files.
- III. Create new templates.

D. No one, other than the Admin, is permitted to permanently delete Laserfiche files or pages from files. Users shall move test files, mistakes, and re-do’s to the trash bin directory for later clearance and deletion by the admin.

- E. No one is permitted to add, delete, or alter files or pages in files that are part of an archival volume.
- F. Records which are permitted to be destroyed after LaserFiche shall be retained until an archival volume is produced and the storage media has been safely stored off-site.
- G. Any user scanning documents into Laserfiche shall place a green "lf" mark in the lower right-hand corner of the document. When an entire file folder is scanned, a single mark may be placed on the file tab.

	<b>CITY OF BELVEDERE – ADMINISTRATIVE POLICY MANUAL</b>		
	<b>POLICY 7.4</b>		
	<b>PERSONNEL RECORDS &amp; RETENTION SCHEDULE</b>		
	<b>Adoption Date:</b>	1/10/2006	<b>Adopted by:</b>
<b>Revised Date:</b>	-	<b>Revised by:</b>	-
<b>Authority:</b>	City Council		

The personnel files maintained by the Administrative Services Manager ~~City Manager as the Personnel Manager~~ shall contain three files for each employee:

- A. Personnel Jacket. This file shall contain the resume, interview notes, and other documents related to the recruiting of the employee; results of reference checks and background investigation; offer of employment, employee contract, and/or Council resolution of employment; acknowledgment of receipt of City manuals and orientation training; notices of action; employee evaluations; documents related to disciplinary actions; and training records.
- B. Medical File. This file shall contain results of pre-employment physicals, drug tests, doctor's slips, and the pre-designation of treating physician.
- C. Workers' Compensation File. This file shall contain the records of any claims for workers' compensation filed by the employee.

Benefit enrollment forms, Form I90, and the W-4 shall be maintained in the office of the ~~Finance Officer~~ Administrative Services Manager.

All personnel files are subject to confidentiality and shall be stored in locked file cabinets. Please consult Belvedere Administrative Policy 9.2, "Personnel Files" for information about Notification of Changes, Medical Information, and Employee Access to Personnel File.

~~The City respects an employee's right to privacy. An employee may review his/her personnel file upon reasonable notice to the City Manager. No information regarding any personnel action or status shall be released without the approval of the employee. In the event that an employee has released such information to the public or media, a follow-up response relating to release of such information may be made at the discretion of the City Manager.~~

Maintenance of Vital Information. The ~~Finance Officer~~ Administrative Services Manager should be informed immediately of any changes in name, address, telephone number, marital status, or family status, beneficiary, or other information on file in order to ensure that federal withholding statements, medical, dental, and life insurance, retirement records, etc. are corrected. The employee may be liable for any costs incurred by the City as a result of failure to notify the ~~Finance Officer~~ Administrative Services Manager of the changes.



**CITY OF BELVEDERE – ADMINISTRATIVE POLICY MANUAL**

**POLICY 7.5**

**RECORDS RETENTION SCHEDULE**

<b>Adoption Date:</b>	3/14/2011	<b>Adopted by:</b>	City Council Resolution 2011-08
<b>Revised Date:</b>	11/14/2011	<b>Revised by:</b>	City Council Resolution 2011-31
<b>Authority:</b>	City Council		

A newly consolidated and cross-referenced records retention schedule for the City of Belvedere was adopted by the City Council on March 14, 2011, by Resolution No. 2011-08. Since that time it has been amended by Resolution No. 2011-31.

The schedule begins on the next page.



AS REVISED & ADOPTED 11/14/2011 \_\_\_\_\_  
 CONSOLIDATED RECORDS RETENTION  
 SCHEDULE FOR THE CITY OF BELVEDERE

**NOTES:** • Entries in the Statutory Minimum column, unless otherwise stated, refer to the period of time that either the record in its original format (e.g., paper, cassette tape) or electronic copy, but not both, must be retained. • Chapt. 60, "Records Policy & L.F. Protocol," of the Belvedere Administrative Policy Manual, as it may be amended from time to time by the City Council, is hereby incorporated by reference in this Records Retention Schedule.

**ABBREVIATIONS USED:** "CCAC" City Clerks Assoc. of California; "CCR" California Code of Regulations; "D.M.V." California Dept. of Motor Vehicles; "FPPCR" Fair Political Practices Commission Regulations; "HSC" California Health & Safety Code; "L.F." Laserfiche; "N.S.S.A." no specific statutory authority; "P.O." paper original.

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	<b>AFFIDAVITS OF PUBLICATION – SEE POSTING &amp; DOCUMENT DISTRIBUTION LOG</b>				
	<b>AGENDAS – SEE LEGISLATIVE RECORDS</b>				
	<b>ASSESSOR’S TAX ROLL (COPY PROVIDED BY COUNTY)</b>	N.S.S.A.		SUPERCEDED + 5	DEST. AUTH. NOT REQ'D.
	<b>ASSESSOR’S MAPS – SEE MAPS</b>				
	<b>AUCTIONS OF CITY PROPERTY – SEE FINANCE DEPT.</b>				
	<b>BLOGS – SEE WEBSITE POSTINGS</b>				
AA	<b>BOND ISSUES – FINAL DOCUMENTATION</b>	GC 53921; CCCP 337.5.	COMPL. + 10 YRS.		KEPT IN FINANCE DEPT.
	<b>BUILDING ADDRESS FILES – CODE ENFORCEMENT ACTIONS – SEE CODE ENFORCEMENT ACTION CASE FILES &amp; LOG ENTRIES</b>				
	<b>BUILDING ADDRESS FILES – RECORDS WITH SPECIFIC RETENTION PERIODS</b>				
	FOR NEW STRUCTURES, LARGE ADDITIONS, AND MAJOR REMODELS FOR WHICH A PERMIT HAS BEEN ISSUED: <ul style="list-style-type: none"> <li>• CERTIFICATE OF OCCUPANCY;</li> <li>• CONSTRUCTION PLANS - APPROVED OR LATEST APPROVED REVISION THERETO;</li> <li>• CONSTRUCTION PERMIT &amp; INSPECTION RECORD;</li> <li>• CUT SHEETS, INSTALLATION INSTRUCTIONS, &amp; MANUALS FOR COMPONENTS INSTALLED AS PART OF A PROJECT – WHICH HAVE A PLAN REVIEW ACCEPTANCE STAMP FROM THE PLAN CHECKER OR A BUILDING DEPT. APPROVAL STAMP;</li> <li>• POLICE REPORTS;</li> <li>• REVISED PLAN SUBMITTAL FORM &amp; ATTACHMENTS;</li> <li>• SPECIAL INSPECTION REPORTS;</li> <li>• STOP WORK ORDERS;</li> <li>• STRUCTURAL PLANS &amp; DETAILS;</li> <li>• STRUCTURAL OBSERVATIONS.</li> <li>• TEMPORARY CONDITIONAL OCCUPANCY AGMT.</li> </ul>	HSC 19850. CCR, TITLE 24: PT. 2, VOL. 1, SEC. 107.5; PT. 2.5, SEC. R106.5.	SEE ATTACHMENT "B."	1 COMPL. SET ON L.F. - PERM.	

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	<p>FOR THE PURPOSES OF THIS SCHEDULE, THE FOLLOWING TYPES OF PROJECTS SHALL BE DEEMED "LARGE ADDITIONS" OR "MAJOR REMODELS":</p> <ul style="list-style-type: none"> <li>• ADDING ONE OR MORE ROOMS.</li> <li>• KITCHEN REMODEL.</li> <li>• MOVING A KITCHEN TO A NEW LOCATION.</li> <li>• ADDING A NEW DECK.</li> <li>• ADDITIONS OF 100 SQ. FT. OR LARGER.</li> <li>• ADDING A BATHROOM.</li> <li>• ADDING SQUARE FOOTAGE TO A SECOND STORY.</li> <li>• PROJECTS OF SIMILAR SCOPE, OR AS MAY BE DETERMINED BY THE BUILDING OFFICIAL.</li> </ul> <p>THE FOLLOWING TYPES OF PROJECTS, BY THEMSELVES, SHALL GENERALLY NOT BE DEEMED "LARGE ADDITIONS" OR "MAJOR REMODELS":</p> <ul style="list-style-type: none"> <li>• REPAIRS.</li> <li>• IN-KIND REPLACEMENTS.</li> <li>• NEW FURNACE.</li> <li>• ADDING A FEW LIGHTING FIXTURES.</li> <li>• ADDING A DOCK.</li> <li>• RE-ROOFING.</li> <li>• LANDSCAPING WALLS OR OUTDOOR LIGHTING.</li> <li>• ADDING A ROOF TO A CAR DECK.</li> </ul>				
<b>AB</b>	<p>FOR PROJECTS THAT ARE <u>NOT</u> NEW STRUCTURES, LARGE ADDITIONS, OR MAJOR REMODELS, FOR WHICH A PERMIT HAS BEEN ISSUED:</p> <ul style="list-style-type: none"> <li>• CONSTRUCTION PLANS - APPROVED OR LATEST APPROVED REVISION THERETO;</li> <li>• CONSTRUCTION PERMIT &amp; INSPECTION RECORD;</li> <li>• CUT SHEETS, INSTALLATION INSTRUCTIONS, &amp; MANUALS FOR COMPONENTS INSTALLED AS PART OF A PROJECT – WHICH HAVE A PLAN REVIEW ACCEPTANCE STAMP FROM THE PLAN CHECKER OR A BUILDING DEPT. APPROVAL STAMP;</li> <li>• POLICE REPORTS;</li> <li>• REVISED PLAN SUBMITTAL FORM &amp; ATTACHMENTS;</li> <li>• SPECIAL INSPECTION REPORTS;</li> <li>• STOP WORK ORDERS;</li> <li>• STRUCTURAL DETAILS;</li> <li>• STRUCTURAL OBSERVATIONS.</li> </ul>	CCR, TITLE 24: PT. 2, VOL. 1, SEC. 107.5; PT. 2.5, SESC. R106.5.	COMPL. OF WORK + 180 DAYS	L.F. - 10 YRS.	
<b>AC</b>	FOR ALL PROJECTS:	N.S.S.A.	NONE	L.F. - 10 YRS.	

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	<ul style="list-style-type: none"> <li>ACKNOWLEDGEMENT OF CONSTRUCTION RESPONSIBILITY</li> <li>ALTERNATIVE MATERIALS &amp; METHODS APPROVAL;</li> <li>APPLICATION REVIEW BY OUTSIDE AGENCIES W/ OVERLAPPING JURISDICTION (TFPD, BCDC, BAAQMD, ACE);</li> <li>CORRESPONDENCE &amp; EMAIL OF A SUBSTANTIVE NATURE TO/FROM THE BUILDING DEPARTMENT FILED IN BUILDING ADDRESS FILES.</li> </ul>				
AD	FOR PROJECTS FOR WHICH A CONSTRUCTION PERMIT WAS PROCESSED & APPROVED BUT NEVER ISSUED.	N.S.S.A.	NONE	2 YRS.	UNISSUED PERMIT - L.F. PLANS & DOCS - DO NOT LF,
AE	FOR PROJECTS FOR WHICH A PERMIT WAS ISSUED, BUT THE PROJECT WAS NEVER COMPLETED. ALL PLANS & DOCUMENTS RELATED TO THAT PROJECT.	N.S.S.A.	NONE	L.F. - 2 YRS.	
AF	FOR STRUCTURES WHICH HAVE BEEN DEMOLISHED. ALL PLANS & DOCUMENTS RELATED TO THAT PROJECT.	CCR, TITLE 24: PT. 2, VOL. 1, SEC. 107.5; PT. 2.5, SESC. R106.5.	COMPL. OF WORK + 180 DAYS	DO NOT RETAIN.	DESTROY RECORDS AFTER DEMOLITION.
	<ul style="list-style-type: none"> <li>GEOTECHNICAL MATTERS: SOILS REPORTS, GEOTECHNICAL REPORTS, PLAN CHECK REVIEWS, &amp; OBSERVATIONS.</li> <li>LAND SURVEY MAPS.</li> </ul>	N.S.S.A.	NONE	L.F. - PERM.	
	INDEX SHEETS GIVING THE STORAGE LOCATION OF SURVEY MAPS.	N.S.S.A.	NONE	L.F. - UNTIL SUPERCEDED.	DEST. AUTH. NOT REQ'D.
	<ul style="list-style-type: none"> <li>BACKFLOW DEVICES - SPECIAL PLUMBING PERMITS FOR.</li> <li>WAIVERS FOR BACKFLOW DEVICES</li> </ul>	CCR106.4.2	COMPL. OF WORK + 90 DAYS	L.F. - PERM.	
AG	CONSTRUCTION TIME LIMIT PENALTY & COMPLIANCE ORDER ACTIONS. RECORDS FOR ACTIONS WHICH DO NOT RESULT IN THE PLACING OF A LIEN ON THE PROPERTY: <ul style="list-style-type: none"> <li>CITY CLERK'S REPORT TO COUNCIL</li> <li>COUNCIL MINUTES</li> <li>COUNCIL RESOLUTIONS</li> <li>COUNCIL STAFF REPORTS</li> <li>CORRESPONDENCE TO/FROM THE BUILDING DEPARTMENT, &amp; PROOF OF SERVICE, RELATING TO CTL PENALTIES</li> <li>ENCROACHMENT PERMITS</li> <li>NOTICE OF HEARING</li> <li>PARKING PLANS PENALTY CALCULATIONS</li> <li>STAGING PLANS</li> </ul>	GC 34090, 34090.5	FINAL DISPOSITION + 2	L.F. - 10 YRS.	
	CONSTRUCTION TIME LIMIT PENALTY ACTIONS. RECORDS FOR ACTIONS WHICH RESULT IN A LIEN BEING FILED AGAINST THE PROPERTY:	GC 34090, 34090.5	PERM.	L.F. - PERM.	

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	<ul style="list-style-type: none"> <li>• CITY CLERK'S REPORT TO COUNCIL</li> <li>• COUNCIL MINUTES</li> <li>• COUNCIL RESOLUTIONS</li> <li>• COUNCIL STAFF REPORTS</li> <li>• CORRESPONDENCE TO/FROM THE BUILDING DEPARTMENT, &amp; PROOF OF SERVICE, RELATING TO CTL PENALTIES &amp; COMPLIANCE ORDERS.</li> <li>• ENCROACHMENT PERMITS</li> <li>• LIEN FILINGS</li> <li>• NOTICE OF HEARING</li> <li>• PARKING PLANS PENALTY CALCULATIONS</li> <li>• STAGING PLANS</li> </ul>				
	RESIDENTIAL BUILDING RECORDS REPORT & R.B.R. APPLICATION	N.S.S.A.	NONE	L.F. OF MOST RECENT R.B.R. - UNTIL SUPERCEDED	DEST. AUTH. NOT REQ'D.
<b>BUILDING ADDRESS FILES – RECORDS WITH MINIMAL OR NO RETENTION PERIODS</b>					
AH	RECORDS WITHOUT HISTORIC VALUE: <ul style="list-style-type: none"> <li>• APPLICATIONS FOR BUILDING PERMITS WHEN THE APPLICATION IS NOT THE PERMIT ITSELF</li> <li>• ARCHITECTURAL SPECIFICATIONS (NON-STRUCTURAL, FINISHES, HARDWARE, SYSTEMS DESCRIPTIONS, ETC.)</li> <li>• CARBON COPIES OF BUILDING PERMITS</li> <li>• CERTIFICATES OF INSURANCE.</li> <li>• CONSTRUCTION PLAN REVIEW LETTERS</li> <li>• CORRECTION NOTICES</li> <li>• CORRESPONDENCE &amp; EMAIL RE. NOISE OR PARKING ISSUES, MEETING ARRANGEMENTS, &amp; OTHER NON-SUBSTANTIVE MATTERS.</li> <li>• CUT SHEETS, INSTALLATION INSTRUCTIONS, &amp; MANUALS FOR COMPONENTS INSTALLED AS PART OF A PROJECT – WHICH DO NOT HAVE A PLAN REVIEW ACCEPTANCE</li> </ul>	N.S.S.A.	NONE	P.O. - 2 YRS. FROM DATE CREATED OR RECEIVED.	DO NOT L.F.; ARCHIVE UNTIL DESTR. DATE.

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	<p>STAMP FROM THE PLAN CHECKER OR A BUILDING DEPT. APPROVAL STAMP.</p> <ul style="list-style-type: none"> <li>• INTERNAL REVIEW OF CONSTRUCTION PLANS.</li> <li>• ENERGY CALCULATIONS [CERTIF. OF COMPLIANCE PRINTED ON PLANS]</li> <li>• ENGINEERING CALCULATIONS</li> <li>• ENCROACHMENT PERMIT (ROAD CLOSURE) EXCEPT FOR THOSE REGARDING COMPLIANCE ORDERS OR CONSTRUCTION TIME LIMIT PENALTIES.</li> <li>• FINAL APPROVAL NOTICE</li> <li>• INVOICES &amp; SHIPPING LISTS FOR MATERIALS.</li> <li>• GANTT CHARTS.</li> <li>• INSPECTION REQUEST</li> <li>• MONEY RECEIPTS</li> <li>• OWNER/CONTRACTOR AGREEMENTS.</li> <li>• OWNER/SPECIAL INSPECTION CONTRACTS.</li> <li>• PERMIT ISSUANCE CHECKLIST.</li> <li>• PERMIT FEE RE-VALUATIONS &amp; ATTACHED DOCUMENTATION</li> <li>• PEST REPORTS</li> <li>• PHOTOS</li> <li>• PLAN CHECK COMMENTS &amp; RESPONSES</li> <li>• PLAN CHECK CORRECTION LISTS</li> <li>▪ PRE-CONSTRUCTION MEETING AGENDAS &amp; MINUTES;</li> <li>• PROJECT TIMELINE</li> <li>• PROJECT WORKSHEETS</li> <li>• PROPERTY OWNER'S PACKAGE</li> <li>• RECORD OF SPECIAL INSPECTIONS</li> <li>• RETURN OF REFUNDABLE DEPOSIT</li> <li>• REQUEST FOR DUPLICATION OF PLANS</li> <li>• ROUGH DRAFTS OF CORRESPONDENCE</li> <li>• SCHOOL DISTRICT FEE CERTIFICATIONS.</li> <li>• SPECIAL INSPECTION &amp; TESTING AGREEMENT</li> <li>• STAGING PLANS &amp; PARKING PLANS, EXCEPT FOR THOSE REGARDING COMPLIANCE ORDERS OR CONSTRUCTION TIME LIMIT PENALTIES.</li> <li>• STATEMENT OF TOTAL PROJECT COSTS FOR RE-VALUATION</li> <li>• STRUCTURAL CALCULATIONS [BUT KEEP STRUCTURAL PLANS &amp; DETAILS]</li> <li>• TRANSMITTAL SHEETS &amp; FAX COVER SHEETS</li> <li>• WASTE MANAGEMENT PLAN APPEALS TO THE CITY COUNCIL.</li> <li>• WASTE MANAGEMENT PLAN APPLICATION</li> <li>• WASTE MANAGEMENT PLAN COMPLIANCE DOCUMENTATION.</li> <li>• WASTE MANAGEMENT PLAN PERFORMANCE SECURITY REFUND VALUATIONS &amp; SUPPORTING DOCUMENTATION.</li> </ul>				

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	DRAFT CONSTRUCTION PLANS.	N.S.S.A.	NONE	UNTIL NO LONGER NEEDED.	DEST. AUTH. NOT REQ'D.
	DOCUMENTS RETAINED ELSEWHERE IN CITY FILES: <ul style="list-style-type: none"> <li>CHECK REQUESTS.</li> <li>CITY COUNCIL MEETING MINUTES EXCERPTS, EXCEPT FOR THOSE RELATING TO COMPLIANCE ORDERS &amp; CONSTRUCTION TIME LIMIT PENALTIES.</li> <li>COURTESY NOTICE – PENDING BUILDING PERMIT – <i>SEE POSTING &amp; DOCUMENT DISTRIBUTION LOG</i></li> <li>ENCROACHMENT PERMITS, EXCEPT FOR THOSE RELATING TO COMPLIANCE ORDERS &amp; CONSTRUCTION TIME LIMIT PENALTIES. <i>SEE ENCROACHMENT PERMIT BINDERS.</i></li> <li>PLANNING COMMISSION MEETING MINUTES EXCERPTS.</li> <li>PLANNING DEPARTMENT NOTICES.</li> <li>RECEIPTS FOR MONEY PAID TO CITY.</li> <li>SANITARY DISTRICT 5 PERMIT TO CONNECT.</li> </ul>	GC 34090.7	UNTIL NO LONGER REQ.		DEST. AUTH. NOT REQ'D.
	<ul style="list-style-type: none"> <li>RECORDS WHOSE ADDRESS CANNOT BE ASCERTAINED.</li> <li>RECORDS THAT HAVE NEITHER DATE NOR PERMIT NUMBER TO IDENTIFY THEM.</li> <li>ILLEGIBLE RECORDS.</li> </ul>	N.S.S.A.	NONE	DISCARD - DEST. AUTH. NOT REQ'D.	
AK	BUILDING ADDRESS FILE RECORDS NOT LISTED ELSEWHERE IN THIS SCHEDULE.	N.S.S.A.	NONE	P.O. OR L.F. - 2 YRS. OR SUCH LONGER PERIOD AS MAY BE SET BY STATUTE.	
<b>BUILDING DEPT. PRE-CONSTRUCTION MEETING AUDIO RECORDINGS – SEE PRE-CONSTRUCTION MEETING AUDIO RECORDINGS</b>					
	<b>BUILDING PERMIT BINDERS</b>	N.S.S.A.	NONE	L.F. - PERM.	
<b>BUILDING PERMITS – FOR INDIVIDUAL ADDRESSES – SEE BUILDING ADDRESS FILES</b>					
AL	<b>BUSINESS LICENSE – SEE ALSO FINANCE DEPT.</b> <ul style="list-style-type: none"> <li>APPLICATION FOR BUSINESS LICENSE</li> <li>BUSINESS LICENSE ROSTER</li> </ul>	GC 34090, 34090.5	2 YRS.		DO NOT L.F.
<b>CAMPAIGN STATEMENTS – SEE FPPC FORMS - ELECTIONS</b>					
<b>CITIZEN OF THE YEAR</b>					
AM	NOMINATION LETTERS AND OTHER DOCUMENTS RELATED TO SELECTION OF THE BELVEDERE CITIZEN OF THE YEAR	GC 34090, 34090.5	2 YRS.		
<b>CITY ENGINEER SUBJECT FILES</b>					
AN	PUBLIC WORKS CONTRACTING - GENERAL	GC 34090, 34090.5	SUPERCEDED + 2 YRS.		
AO	FILES CONTAINING NOTES RE. SPECIFIC ADDRESSES	GC 34090, 34090.5	2 YRS.		
AP	<ul style="list-style-type: none"> <li>GENERAL SUBJECT FILES FOR OTHER AGENCIES (E.G. BCDC, SANITARY DIST. 5, JPA, ETC.)</li> <li>NATIONAL FLOOD INSURANCE - GENERAL</li> </ul>	GC 34090, 34090.5	2 YRS.	MINIMUM - 10 YRS.	
<b>CITY PROPERTY</b>					

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	AUCTIONS OF CITY PROPERTY – <i>SEE FINANCE DEPT.</i>				
	CITY PROPERTIES INFO USED FOR GIS LAYER.			ORIGINAL OR L.F. – PERM.	GIS LAYER
	DEEDS – <i>SEE DEEDS TO REAL PROPERTY</i>				
	<ul style="list-style-type: none"> <li>ENGINEERING FILES FOR SPECIFIC STREETS.</li> <li>TIDELANDS INFORMATION.</li> <li>LANDSLIDE RECORDS FOR SPECIFIC SITES.</li> <li>ENGINEERING FILES RE. ROAD IMPACT FEE.</li> </ul>			ORIGINAL OR L.F. – PERM.	
	FIXED ASSET INVENTORY – REFLECTS PURCHASE DATE, COST, ACCOUNT NUMBER – <i>SEE FINANCE DEPARTMENT</i>				
	LANE ABANDONMENT.			ORIGINAL OR L.F. – PERM.	GIS UPDATE
AQ	<ul style="list-style-type: none"> <li>PARKS MASTER PLAN</li> <li>LANES - GENERAL</li> </ul>	GC 34090, 34090.5	2 YRS.	ORIGINAL OR L.F. – 10 YRS.	
	PROPERTY & VEHICLE SCHEDULES FOR INSURANCE – <i>SEE RISK MANAGERMENTS</i>				
	VEHICLE MAINT. RECORDS – <i>SEE PUBLIC WORKS MAINTENANCE FUNCTION</i>				
	VEHICLE TITLE – <i>SEE VEHICLE TITLE</i>				
<b>CLAIMS, LIABILITY &amp; PROPERTY – SEE RISK MANAGEMENT</b>					
<b>CLAIMS, WORKERS COMPENSATION – SEE WORKERS' COMPENSATION – CITY EMPLOYEES</b>					
EL	<p><b>CODE ENFORCEMENT ACTION CASE FILES &amp; LOG ENTRIES – FOR CONSTRUCTION TIME LIMIT ACTIONS, SEE BUILDING ADDRESS FILES – RECORDS WITH SPECIFIC RETENTION PERIODS</b></p> <p>THE ENTIRE CASE FILE, INCLUDING, BUT NOT LIMITED TO:</p> <ul style="list-style-type: none"> <li>COMPLAINANT COMMUNICATIONS.</li> <li>INVESTIGATIVE NOTES, PHOTOS, &amp; OTHER MATERIALS.</li> <li>CORRESPONDENCE &amp; EMAILS.</li> <li>COMPLIANCE ORDERS &amp; NOTICES.</li> <li>STAFF REPORTS.</li> <li>LIEN FILINGS.</li> <li>THE CORRESPONDING LOG ENTRIES IN THE CODE ENFORCEMENT ACTION LOG.</li> </ul>	GC 34090, 34090.5	2 YRS.	2 YRS. FROM FINAL ADJUDICATION OF THE CASE	CASE FILES FOR ALL CODE ENFORCEMENT ACTIONS, REGARDLESS OF THE DEPT. RESPONSIBLE FOR THE INVESTIGATION, ARE MAINTAINED BY THE BUILDING OFFICIAL/CODE ENFORCEMENT OFFICER. DO NOT L.F DESTROY IN A TIMELY MANNER.
<b>COMPUTER PROGRAMS &amp; MANUALS</b>					
AR	<ul style="list-style-type: none"> <li>OBSOLETE VERSIONS OF COMPUTER PROGRAMS WHICH ARE NO LONGER INSTALLED ON THE CITY'S COMPUTERS AND WHICH ARE NOT REQUIRED IN ORDER TO READ ANY OF THE ELECTRONIC DOCUMENTS RETAINED IN THE CITY ARCHIVE.</li> <li>MANUAL FOR THE ABOVE.</li> </ul>	GC 34090	2 YRS.	DESTR. OF LAST ARCHIVAL SOFT RECORD THAT CAN ONLY BE READ BY THE PROGRAM + 2 YRS.	

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	<b>CONSTRUCTION CODES (PRIMARY &amp; SECONDARY)</b>	N.S.S.A.		AT LEAST 1 COPY OF EACH - PERM.	
	<b>CONTRACTS</b>				
AS	<ul style="list-style-type: none"> <li>CONSTRUCTION CONTRACTS</li> <li>CONSTRUCTION BONDS</li> <li>CONSTRUCTION INSURANCE</li> </ul>	GC 34090, 34090.5	2 YRS.	L.F. - EXPIRATION + 5 YRS.	SCAN ALL TOGETHER IN THE CONTRACT FILE.
AT	NON-CONSTRUCTION CONTRACTS & AGREEMENTS.	GC 3409-, 34090.5	2 YRS.	EITHER P.O. OR L.F. - EXPIRATION + 5 YRS.	
AU	CONTRACTS, TO WHICH THE CITY IS NOT A PARTY.	N.S.S.A.		UNTIL NO LONGER REQUIRED.	
	<b>CORRESPONDENCE &amp; EMAIL, CHRONOLOGICAL FILES OF</b>				
AV	<ul style="list-style-type: none"> <li>OUTGOING CORRESPONDENCE OF CITY EMPLOYEES.</li> <li><del>OUTGOING EMAILS OF A SUBSTANTIVE NATURE SENT BY CITY EMPLOYEES. (SEE BAPM, CHAPT. 60)</del></li> </ul>	GC 34090, 34090.5		10 YRS.	
AW	<ul style="list-style-type: none"> <li>OUTGOING CORRESPONDENCE OF MEMBERS OF LEGISLATIVE BODIES.</li> <li><del>OUTGOING EMAILS OF A SUBSTANTIVE NATURE SENT BY MEMBERS OF LEGISLATIVE BODIES. (SEE BAPM, CHAPT. 60)</del></li> </ul>	GC 34090, 34090.5	2 YRS.	5 YRS.	
	<ul style="list-style-type: none"> <li><u>EMAIL OF CITY EMPLOYEES OR MEMBERS OF LEGISLATIVE BODIES NOT OTHERWISE RETAINED UNDER ANOTHER CATEGORY IN THIS RETENTION SCHEDULE (SEE BELVEDERE ADMINISTRATIVE POLICY 7.2)</u></li> </ul>	GC 34090	2 YRS.		<u>EMAIL OLDER THAN 2 YRS WILL BE AUTO-DELETED FROM EMAIL SYSTEM. DEST. AUTH. NOT REQ'D.</u>
	<b>DEEDS TO REAL PROPERTY</b>			EITHER P.O. OR L.F. - PERM.	
	<b>ELECTIONS, CITY - SEE ALSO FPPC FORMS - ELECTIONS</b>				
AX	CITY COUNCIL ELECTION NOMINATION DOCUMENTS.	EC 17100			
			TERM OF OFFICE FOR WHICH THEY WERE FILED + 4 YRS., OR SUCH PERIOD AS SET BY ELECTIONS CODE 17100(b). PROMPT DESTR. REQUIRED AT END OF STATED RETENTION PERIOD.		
AY	<ul style="list-style-type: none"> <li>CERTIFICATE OF CANVASS OF VOTE BY COUNTY CLERK</li> <li>CERTIFICATE OF ELECTION</li> <li>ONE COMPL. COPY OF THE PACKET DISTRIBUTED TO CANDIDATES.</li> </ul>	GC 34090, 34090.5	2 YRS.		RETAIN FOR REF. UNTIL SUPERCEDED.
	OATHS OF OFFICE FOR COUNCIL MEMBERS	GC 34090, 34090.5	2 YRS	L.F.--PERM.	
AZ	ELECTION-RELATED RECORDS WHICH ARE NOT LISTED ABOVE, INCLUDING:	GC 34090, 34090.5	2 YRS.		DO NOT L.F. DESTROY AFTER 2 YRS.



CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	<ul style="list-style-type: none"> <li>• CONSENT TO USE CITY BUILDINGS AS POLLING PLACE.</li> <li>• SAMPLES &amp; GUIDELINES PROVIDED BY THE COUNTY REGISTRAR OF VOTERS &amp; OTHER SOURCES.</li> <li>• MEMOS TO/FROM CANDIDATES, COMMITTEES, FPPC, REGISTRAR OF VOTERS, ETC.</li> <li>• SCHEDULES, CALENDARS, AND NOTES.</li> </ul>				WHEN NO LONGER NEEDED.
<b>ELECTRONIC DOCUMENTS – SEE SPECIFIC TYPE OR CONTENT</b>					
<b>EMAIL – SEE CORRESPONDENCE</b>					
BI	<b>ENCROACHMENT PERMIT BINDERS</b>	N.S.S.A.	NONE	P.O. - 5 YRS.	ENCROACHMENT PERMITS MAY BE NEEDED WHEN CTL APPEALS COME UP AS LONG AS FOUR YEARS AFTER THE START OF A PROJECT. THEREFORE, THE BINDERS OF ENCROACHMENT PERMITS WILL BE RETAINED, IN THEIR PAPER FORM, FOR 5 YEARS. DO NOT L.F.
<b>FACEBOOK – SEE WEBSITE POSTINGS</b>					
<b>FINANCE DEPARTMENT</b>					
BA	<ul style="list-style-type: none"> <li>• ACCOUNTS PAYABLE – INVOICES, CHECK COPIES, SUPPORTING DOCUMENTATION</li> <li>• ACCOUNTS RECEIVABLE</li> </ul>			AUDIT + 4	
BB	ANNUAL FINANCIAL REPORTS			AUDIT + 7	
	ASSESSOR'S UNSECURED TAX ROLL – <i>SEE ASSESSOR'S TAX ROLLS</i>				
	AUDITS			PERM.	
BC	BANK RECONCILIATIONS – STATEMENTS, SUMMARIES FOR RECEIPTS, DISBURSEMENT & RECONCILIATIONS			AUDIT + 5	
	BUDGET – ADOPTED			PERM.	
BD	BUDGET – PROPOSED			CURRENT YEAR + 2	
BE	BUDGET ADJUSTMENTS – ACCOUNT TRANSFERS			AUDIT + 2	
BF	BUSINESS LICENSE PAID AND REPORTS			TERMINATION + 4	
BG	DEFERRED COMPENSATION REPORTS – RECORDS OF EMPLOYEE CONTRIBUTIONS & CITY PAYMENTS			TERMINATION + 5	
BH	FIXED ASSET INVENTORY – REFLECTS PURCHASE DATE, COST, ACCOUNT NUMBER			AUDIT + 4	

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	INSURANCE – GENERAL LIABILITY, AUTO LIABILITY, PROPERTY, WORKERS' COMPENSATION – <i>SEE RISK MANAGEMENT</i>				
<b>BJ</b>	JOURNAL ENTRIES			AUDIT + 2	
<b>BK</b>	CHECKS – ORIGINALS – INCLUDES PAYROLL, CANCELLED & VOICED			AUDIT + 5	CANCELLED CHECKS NOW VIEWABLE ONLINE ONLY
<b>BL</b>	DEPOSITS, RECEIPTS – CHECKS, COINS, CURRENCY			AUDIT + 4	
<b>BM</b>	EMPLOYEE TIME SHEETS – SIGNED BY EMPLOYEE & FEMA REPORTS			AUDIT + 6	
<b>BN</b>	INVOICES – COPIES SENT FOR FEES OWED, BILLING			AUDIT + 2	
<b>BO</b>	LEDGER, GENERAL			PERM	
	PAYROLL ADJUSTMENTS – AUDIT PURPOSES			AUDIT + 4	
	PAYROLL REGISTER – LABOR COSTS BY EMPLOYEE & PROGRAM			PERM.	
<b>BQ</b>	PERS EMPLOYEE DEDUCTION REPORTS – RECORD OF DEDUCTIONS			TERMINATION + 4	
	PROPERTY SCHEDULES FOR INSURANCE – <i>SEE RISK MANAGEMENT</i>				
<b>BR</b>	PURCHASE ORDERS – ORIGINAL DOCUMENTS			AUDIT + 4	
<b>BS</b>	SALARY RECORDS – DEDUCTION AUTHORIZATION, BENEFICIARY DESIGNATIONS, UNEMPLOYMENT CLAIMS, GARNISHMENTS			TERMINATION + 3	
	STATE CONTROLLER REPORTS			PERM.	CONTROLLER MAY DESTROY AFTER 5 YEARS
<b>BT</b>	SURPLUS PROPERTY AUCTION – LISTING OF PROPERTY	GC 34090, 34090.5	2 YRS.	5 YRS.	
<b>BU</b>	TAX REPORTS – FEDERAL & STATE – FORMS 1096, 1099, W-4, & W-2			AUDIT + 4	
<b>BV</b>	TAXES, RECEIVABLE – TITLE TRANSFERS WHEN VEHICLE SOLD			AUDIT + 3	
	VOUCHER – ACCT. POSTING W/ SUPPORTING DOCS.			PERM.	
<b>BW</b>	WARRANTS REGISTER			AUDIT + 2	
	<b>FIXED ASSET INVENTORY SEE FINANCE DEPT.</b>				
<b>BX</b>	<b>FLOODPLAIN WORKSHEETS BINDER</b> • FEMA ELEVATION CERTIFICATES. • FLOODPLAIN DEVELOPMENT WORKSHEETS.	GC 34090, 34090.5	2 YRS.	PERM.	
	<b>FPPC FORMS - ELECTIONS</b>				
<b>BY</b>	FORM 700, STATEMENT OF ECONOMIC INTEREST, CANDIDATES FOR CITY COUNCIL.	GC 81009(e), (g)	P.O. - 2 YRS. THEREAFTER, EITHER P.O. OR L.F., AN ADDL. 5 YRS.		
<b>BZ</b>	CAMPAIGN STATEMENTS OF:	GC 81009(b), (g)	P.O. - 2 YRS. THEREAFTER, EITHER P.O. OR L.F. - PERM.		

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	<ul style="list-style-type: none"> <li>PERSONS ELECTED TO THE CITY COUNCIL.</li> <li>INCUMBENT CITY COUNCILORS WHO UNSUCCESSFULLY RUN FOR RE-ELECTION.</li> <li>COMMITTEES SUPPORTING ANY CITY COUNCIL OFFICEHOLDER OR ANY SUCCESSFUL CANDIDATE FOR CITY COUNCIL.</li> </ul>				
CA	CAMPAIGN STATEMENTS OF: <ul style="list-style-type: none"> <li>UNSUCCESSFUL CANDIDATES FOR CITY COUNCIL; AND</li> <li>COMMITTEES SUPPORTING THOSE CANDIDATES.</li> </ul>	GC 81009(b), (g)	P.O. - 2 YRS. THEREAFTER, EITHER P.O. OR L.F. - ADDL. 3 YRS.		
CB	CAMPAIGN STATEMENTS OF: <ul style="list-style-type: none"> <li>MEASURE COMMITTEES.</li> <li>ANY OTHER COMMITTEES, NOT LISTED ABOVE, WHICH ARE REQUIRED TO FILE STATEMENTS WITH THE CITY CLERK.</li> </ul>	GC 81009(c), (g)	P.O. - 2 YRS. THEREAFTER, EITHER P.O. OR L.F. - ADDL. 5 YRS.		
CD	FORM 410, STATEMENT OF ORGANIZATION (PHOTOCOPY OF THE ORIGINAL FILED WITH THE SECRETARY OF STATE).	GC 81009(f), (g)	PAPER - 2 YRS. THEREAFTER, ADDL. 2 YRS.		
CE	<ul style="list-style-type: none"> <li>FORM 501, CANDIDATE'S INTENTION STATEMENT</li> <li>ALL OTHER ELECTION REPORTS AND STATEMENTS, NOT LISTED ABOVE, WHICH ARE REQUIRED TO BE FILED WITH THE CITY CLERK.</li> </ul>	GC 81009(e), (g)	P.O. - 2 YRS. THEREAFTER, EITHER P.O. OR L.F. - ADDL. 5 YRS.		
<b>FORMS – BLANKS SEE OTHER RECORDS</b>					
<b>FPPC FORMS – ALL OTHER</b>					
CD	FORM 700, STATEMENT OF ECONOMIC INTEREST, GC 87200 FILERS, PHOTOCOPY: <ul style="list-style-type: none"> <li>CITY MANAGER,</li> <li>CITY ATTORNEY</li> <li>CITY COUNCIL</li> <li>PLANNING COMMISSION.</li> </ul>	GC 81009(f), (g)	PAPER - 2 YRS. THEREAFTER, EITHER P.O. OR L.F. - ADDL. 2 YRS.		
CE	FORM 700, STATEMENT OF ECONOMIC INTEREST: <ul style="list-style-type: none"> <li>CITY'S CONFLICT-OF-INTEREST CODE FILERS.</li> <li>BEL-TIB JT. REC'S CONFLICT-OF-INTEREST CODE FILERS.</li> </ul>	GC 81009(e), (g)	P.O. - 2 YRS. THEREAFTER, EITHER P.O. OR L.F. - AN ADDL. 5 YRS.		
CF	FORM 801, GIFT TO AGENCY REPORT.	FPPCR 18944.2	CITY WEBSITE & P.O. – 4 YRS.		
CG	OTHER RECORDS RELATED TO CONFLICT OF INTEREST FILING, INCLUDING: <ul style="list-style-type: none"> <li>FPPC MANUALS FOR FILING OFFICIALS</li> <li>MEMOS TO/FROM FILERS, FPPC, ETC.</li> <li>SCHEDULES, CALENDARS, AND NOTES.</li> </ul>	GC 34090, 34090.5	2 YRS.		DO NOT L.F DESTROY AFTER 2 YRS. WHEN NO LONGER NEEDED.
	<b>GENERAL PLAN</b> <ul style="list-style-type: none"> <li>ADOPTED GENERAL PLANS AND ADOPTED AMENDMENTS/UPDATES THERETO.</li> <li>SUBJECT FILES RE. PROPOSED AMENDMENTS/UPDATES.</li> </ul>	GC 34090, 34090.5	EITHER P.O. OR L.F. – 2 YRS.	L.F. – PERM..	
<b>INSURANCE – GENERAL LIABILITY, AUTO LIABILITY, PROPERTY, WORKERS' COMPENSATION – SEE RISK MANAGEMENT</b>					
<b>INTERNET POSTINGS – SEE WEBSITE POSTINGS</b>					

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	<b>LIENS</b> • RECORDS AFFECTING THE TITLE TO REAL PROPERTY [OTHER THAN DEEDS] OR LIENS THEREON.	GC 34090, 34090.5	EITHER P.O. OR L.F. - PERM.		
<b>LEGISLATIVE RECORDS OF CITY OF BELVEDERE LEGISLATIVE BODIES</b>					
	AGENDAS OF ALL BODIES	GC 34090, 34090.5	2 YRS.	PERM..	
	AGENDA PACKETS - ALL BODIES	GC 34090, 34090.5	2 YRS.	PERM..	
<b>CH</b>	AUDIO RECORDING OF MEETINGS – ALL BODIES	GC 54953.5(b)	30 DAYS	5 YRS.	
	MINUTES – SIGNED ORIGINALS - CITY COUNCIL & PLANNING COMMISSION.	GC 40801	P.O. - PERM.		
	MINUTES – SIGNED - OTHER BODIES	GC 40801	P.O. - PERM.	L.F. - PERM.	
	MINUTES – BOUND FACSIMILES – ALL BODIES	GC 34090.7	UNTIL NO LONGER NEEDED	PERM..	
	MINUTES – COMPREHENSIVE GENERAL INDEX – ALL BODIES	GC 40801	PERM.		INDEX GENERATED & UPDATED WITHIN THE L.F. PROGRAM.
<b>CI</b>	MINUTES - HAND-WRITTEN NOTES FROM WHICH MINUTES ARE PRODUCED – CITY COUNCIL & PLANNING COMMISSION	GC 34090, 34090.5	2 YRS.		DO NOT L.F.
	NOTICES, PUBLIC & AFFIDAVITS OF PUBLICATION – <i>SEE POSTING &amp; DOCUMENT DISTRIBUTION LOG</i>				
	ORDINANCES – SIGNED ORIGINALS	GC 34090, 34090.5	EITHER P.O. OR L.F. - PERM.	P.O. - PERM.	
	ORDINANCES – BOUND CERTIFIED FACSIMILES	GC 40806.	PERM.		
	ORDINANCES – CHRONOLOGICAL LISTING OF NUMBERS, DATES & SUBJECTS	GC 34090, 34090.5	2 YRS.	PERM.	
<b>CJ</b>	PROCLAMATIONS – CITY COUNCIL & MAYORAL	GC 34090, 34090.5	2 YRS		DO NOT L.F.
	RESOLUTIONS – SIGNED ORIGINALS – CITY COUNCIL & PLANNING COMMISSION	GC 34090, 34090.5	EITHER P.O. OR L.F. - PERM.	P.O. - PERM.	
	RESOLUTIONS – BOUND FACSIMILES – CITY COUNCIL & PLANNING COMMISSION	GC 34090.7	UNTIL NO LONGER NEEDED.	PERM..	
	RESOLUTIONS – CHRONOLOGICAL LISTING OF NUMBERS, DATES & SUBJECTS – CITY COUNCIL & PLANNING COMMISSION	GC 34090, 34090.5	2 YRS.	PERM.	
<b>CK</b>	<b>LITIGATION FILES</b> MAY INCLUDE CLAIMS, SUBPOENAS, ATTORNEY/CLIENT PRIVILEGED	GC 34090	FINAL DISPO. + 2 YRS.	MINIMUM: FINAL DISPOSITION + 2 YRS. (WITH APPROVAL OF CITY ATTORNEY)	
<b>MAPS &amp; DIAGRAMS</b>					
	• EASEMENTS MAPS. • SURVEY MAPS			ORIGINAL & L.F. – PERM.	FLAT FILE
<b>CL</b>	• PRELIMINARY PROJECT/SUBDIVISION MAPS/PLANS • UTILITY COMPANY MAPS/PLANS	GC 34090, 34090.5	2 YRS.	UNTIL SUPERCEDED + 2 YRS.	FLAT FILE
	• ORIGINAL PARCEL & SUBDIVISION MAPS/PLANS. • BASE MAPS.			ORIGINAL – PERM.	FLAT FILE
	HISTORICAL MAPS	GC 34090, 34090.5	2 YRS.	ORIGINAL – PERM. HISTORICAL MAPS WHICH ARE NO LONGER NEEDED BY THE CITY	FLAT FILE

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
				SHOULD BE DONATED TO THE BELVEDERE-TIBURON LANDMARKS SOCIETY FOR PRESERVATION AND USE BY RESEARCHERS.	
CM	ASSESSOR'S MAPS (COPY PROVIDED BY THE COUNTY)	N.S.S.A.		L.F. - 5 YRS.	
	ASSESSMENT DISTRICT MAPS			ORIGINAL &/OR L.F. - PERM.	FLAT FILE
<b>MINUTES – SEE LEGISLATIVE RECORDS</b>					
CN	<b>NOTICE OF COMPLETION - RECORDED</b>	GC 34090, 34090.5	2 YRS.	L.F. – MINIMUM 10 YRS.	
<b>NOTICING BINDERS – SEE POSTING &amp; DOCUMENT DISTRIBUTION LOG</b>					
<b>ORDINANCES – SEE LEGISLATIVE RECORDS</b>					
	<b>OATH OF OFFICE</b>	GC 23090, 3409.5. CCAC RECS. END OF TERM + 6 YRS.	2 YRS.	L.F. – PERM..	
<b>OTHER RECORDS</b>					
CO	RECORDS WHICH ARE NOT SPECIFICALLY LISTED IN THIS RETENTION SCHEDULE, WHEN SUCH RECORDS ARE NO LONGER REQUIRED. INCLUDING, BUT NOT LIMITED TO: <ul style="list-style-type: none"> <li>• COMPUTER DATA FILES, E.G., WORD PROCESSING, GRAPHICS.</li> <li>• BUSINESS LICENSE ROSTER.</li> <li>• CITIZEN OF THE YEAR NOMINATION LETTERS AND OTHER DOCUMENTS RELATED TO SELECTION OF THE BELVEDERE CITIZEN OF THE YEAR.</li> <li>• FORMS AND INSTRUCTIONS, ONCE USED IN THE CONDUCT OF CITY BUSINESS, WHETHER PUBLISHED BY THE CITY OR BY ANOTHER ENTITY, WHEN SUCH FORMS AND INSTRUCTIONS ARE NO LONGER REQUIRED. ONE BLANK SET.</li> <li>• PERSONNEL SAFETY COMMITTEE EMAILS, MEMOS, &amp; OTHER MISC. RECORDS.</li> <li>• PHONE ROSTERS OF CITY EMPLOYEES &amp; VOLUNTEERS, PREPARED FOR STAFF USE OR PUBLIC DISTRIBUTION, WHEN SUPERCEDED.</li> <li>• PHONE MESSAGE RECORD BOOKS.</li> </ul>	GC 34090	2 YRS. OR SUCH LONGER PERIOD AS MAY BE REQ. BY STATUTE.		
	ILLEGIBLE RECORDS.	N.S.S.A.	NONE	DISCARD.	
	<ul style="list-style-type: none"> <li>• DUPLICATE COPIES.</li> <li>• RECORDS WHICH HAVE ALREADY BEEN SCANNED INTO L.F..</li> </ul>	GC 34090.7	UNTIL NO LONGER REQUIRED, OR SUCH LONGER PERIOD AS MAY BE REQUIRED BY STATUTE.		DEST. AUTH. NOT REQ'D.
<b>PAYROLL RECORDS – SEE FINANCE DEPT.</b>					
<b>PERSONNEL RECORDS - ACTIVE &amp; FORMER EMPLOYEES</b>					

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
CP	EMPLOYMENT APPLICATION MATERIALS, INCLUDING BUT NOT LIMITED TO: APPLICATION, RESUME, REFERENCE LETTERS, WORK SAMPLES, CERTIFICATIONS, CREDENTIALS.	GC 12946	2 YEARS FROM DATE OF CREATION/RECEIPT OR EMPLOYMENT ACTION TAKEN.	TERMINATION DATE PLUS <del>2</del> 3 YEARS	
CQ	<ul style="list-style-type: none"> <li>AWARDS, LETTERS OF COMMENDATION, AND THE LIKE</li> <li>EMPLOYEE ACTION FORMS.</li> <li>PAPERWORK AUTHORIZING FINGERPRINTING AND BACKGROUND CHECK.</li> <li>PERSONNEL JACKETS</li> <li>PRE-EMPLOYMENT HEALTH EVALUATIONS.</li> <li>REFERENCE CHECKS, BACKGROUND INVESTIGATIONS.RESULTS OF DRUG TESTING.</li> </ul>	N.S.S.A. <u>LAB 1198.5(c)</u>	<del>NONE</del> 3 YEARS AFTER <u>TERMINATION OF EMPLOYMENT</u>	TERMINATION DATE PLUS <del>2</del> 3 YEARS	
	CRIMINAL OFFENDER RECORD INFORMATION.	CCR, TITLE 11, SEC. 708	DESTRUCTION UPON DETERMINATION OF EMPLOYMENT.		DEST. AUTH. NOT REQ'D.
CR	D.M.V. FORM INF 1101 – AUTHORIZATION FOR RELEASE OF DRIVER RECORD INFORMATION	N.S.S.A.	NONE	TERMINATION DATE PLUS <del>2</del> 3 YEARS	
	D.M.V. FORM DL414 – EMPLOYER PULL NOTICE PRINTOUTS (CURRENT REPORTABLE DRIVER LICENSE RECORD).	DMV FORM INF1130 – GOVT. REQUESTER ACCOUNT APPL.. - SEC. C7.	DESTROY ONCE ITS LEGITIMATE USE HAS ENDED.	UPON TERMINATION OF EMPLOYMENT.	DO NOT LF. DESTROY BY SHREDDING. DEST. AUTH. NOT REQ'D.
CT	TRAINING RECORDS	N.S.S.A.	NONE	2 YEARS FROM DATE THE ITEM IS SUPERCEDED OR NO LONGER NEEDED.	
	WORKER'S COMPENSATION CLAIMS - <i>SEE WORKERS' COMPENSATION – CITY EMPLOYEES</i>				
<b>PERSONNEL RECORDS - APPLICANTS NOT HIRED</b>					
CU	EMPLOYMENT APPLICATION MATERIALS, INCLUDING BUT NOT LIMITED TO: APPLICATION, RESUME, REFERENCE LETTERS, WORK SAMPLES, CERTIFICATIONS, CREDENTIALS.	GOVERNMENT CODE SEC. 12946	2 YEARS FROM DATE OF NO-HIRE DECISION.		
CV	<ul style="list-style-type: none"> <li>PRE-EMPLOYMENT HEALTH EVALUATIONS.</li> <li>RESULTS OF DRUG TESTING.</li> </ul>	N.S.S.A.	NONE	2 YEARS FROM DATE OF NO-HIRE DECISION.	
CW	CRIMINAL OFFENDER RECORD INFORMATION.	CCR, TITLE 11, SEC. 708	DESTRUCTION UPON DETERMINATION OF EMPLOYMENT.		DEST. AUTH. NOT REQ'D.
CX	REFERENCE CHECKS, BACKGROUND INVESTIGATIONS.	N.S.S.A.	NONE	2 YEARS FROM DATE OF NO-HIRE DECISION.	
CY	APPLICANT-SUPPLIED D.M.V. PRINTOUT OF DRIVER'S RECORD.			DESTRUCTION UPON DETERMINATION OF EMPLOYMENT.	DEST. AUTH. NOT REQ'D.
<b>PERSONNEL SAFETY COMMITTEE</b>					

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
CZ	<ul style="list-style-type: none"> <li>CAL/OSHA FORM 300, LOG OF WORK-RELATED INJURIES &amp; ILLNESSES</li> <li>CAL/OSHA FORM 300A, SUMMARY OF WORK-RELATED INJURIES AND ILLNESSES</li> <li>CAL/OSHA FORM 301 INCIDENT REPORTS, INJURY AND ILLNESS INCIDENT REPORT</li> </ul>	CCR TITLE 8 14300.33; GC 34090, 34090.5	5 YRS. FOLLOWING THE END OF THE CALENDAR YEAR THAT THESE RECORDS COVER	EITHER P.O. OR L.F. - 5 YRS. FOLLOWING THE END OF THE CALENDAR YEAR THAT THESE RECORDS COVER	
	STATE AND FEDERAL LABOR LAW POSTERS	N.S.S.A.		UNTIL SUPERCEDED	DEST. AUTH. NOT REQ'D.
DA	CITY'S INJURY AND ILLNESS PREVENTION PLAN	GC 34090, 34090.5	UNTIL SUPERCEDED + 2		
DB	<ul style="list-style-type: none"> <li>AGENDAS</li> <li>MINUTES</li> <li>AGENDA PACKETS</li> </ul>	GC 34090 & 34090.5	2 YRS.	EITHER ORIGINAL OR L.F. - 5 YRS.	
	<ul style="list-style-type: none"> <li>SAFETY REPORTS</li> <li>TRAINING LOGS</li> </ul>	GC 34090, 34090.5	CCAC REC: 5 YRS.	EITHER ORIGINAL OR L.F. - 5 YRS.	
DC	<b>PHONE MESSAGE RECORD BOOKS</b>	GC 34090, 34090.5	2 YRS.	5 YRS.	
	<b>PLANNING ADDRESS FILES</b>				
	APPLICATIONS, PLANNING – ALL - INCLUDING SUPPORTING DOCUMENTS, SUBSTANTIVE CORRESPONDENCE & STAFF REPORTS.	GC 34090	2 YRS.	P.O.: UNTIL FINAL SIGN-OFF BY PLANNING STAFF. L.F.: PERM..	
	APPLICATIONS, PLANNING - WHEN THE SUBJECT OF LITIGATION - INCLUDING SUPPORTING DOCUMENTS, SUBSTANTIVE CORRESPONDENCE & STAFF REPORTS.	GC 34090	FINAL DISPOSITION BY SETTLEMENT OR COURT JUDGMENT + 2 YRS.	P.O.: UNTIL FINAL DISPOSITION BY SETTLEMENT OR COURT JUDGMENT AND APPROVAL BY CITY ATTORNEY FOR SCANNING & DESTR. OF P.O.S. THEREAFTER, L.F. - PERM..	
	CEQA DOCUMENTS: <ul style="list-style-type: none"> <li>EXEMPTIONS</li> <li>ENVIRONMENTAL IMPACT REPORTS</li> <li>MITIGATION MONITORING</li> <li>NEGATIVE DECLARATIONS</li> <li>NOTICES OF COMPLETION AND DETERMINATION</li> <li>COMMENTS</li> <li>STATEMENTS OF OVERRIDING CONSIDERATIONS.</li> </ul>	GC 34090, 34090.5	2 YRS.	L.F. – PERM..	
	CERTIFICATES OF COMPLIANCE - RECORDED COPY.	GC 34090	2 YRS. OR SUCH LONGER PERIOD AS MAY BE REQUIRED BY STATUTE.	L.F. - PERM.	DISCARD DRAFTS WHEN RECORDED COPY REC'D..
	CORRESPONDENCE & EMAILS, NOT OF A SUBSTANTIVE NATURE, FOR WHICH A COPY IS RETAINED IN THE CHRON. CORRESPONDENCE FILE.	GC 34090.7	UNTIL NO LONGER REQUIRED		DEST. AUTH. NOT REQ'D.
	HISTORIC DESIGNATION APPLICATIONS, WHETHER OR NOT APPROVED:	GC 34090, 34090.5	2 YRS.	L.F. – PERM..	

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	<ul style="list-style-type: none"> <li>APPLICATION MATERIALS.</li> <li>LANDMARKS DESIGNATION SURVEY FORMS</li> <li>STAFF REPORTS</li> </ul>				
DD	MATERIAL SAMPLES FOR APPROVED PROJECTS.	GC 34090	2 YRS.	UNTIL PROJECT PASSES ITS FINAL PLANNING INSPECTION.	
	MATERIAL SAMPLES - <ul style="list-style-type: none"> <li>FOR DENIED AND WITHDRAWN PROJECTS</li> <li>THAT ARE SUPERCEDED.</li> </ul>		NONE.		DEST. AUTH. NOT REQ'D.
	NOTICE OF PUBLIC HEARING & AFFIDAVITS OF PUBLICATION – SEE POSTING & DOCUMENT DISTRIBUTION LOG				NOT RETAINED IN PLANNING ADDRESS FILES
	PHOTOGRAPHS.	GC 34090	2 YRS.	L.F. - PERM.	
	PLANS - APPROVED OR DENIED.	GC34090	2 YRS.	P.O. OR L.F. – ONE SET - PERM.	<del>DO NOT L.F.</del>
	PLANS – SUPERCEDED. *THESE ARE ITERATIONS OF PLANS FOR A PROJECT WHICH IS EVENTUALLY APPROVED OR DENIED. THESE ARE NOT APPROVED PLANS FOR A PROJECT WHICH IS ABANDONED BY THE APPLICANT, OR LATER MATERIALLY CHANGED & REAPPLIED FOR BY THE APPLICANT OR A SUBSEQUENT OWNER.		NONE.	DISCARD.	DEST. AUTH. NOT REQ'D.
DE	PLANS – WITHDRAWN.		NONE	P.O. OR L.F. - RETENTION OR DESTR. IS AT THE DISCRETION OF THE HEAD OF THE PLANNING DEPT.	
DF	PLANS – WHEN THE SUBJECT OF LITIGATION, NO MATTER THEIR SUBMISSION OR APPROVAL STATUS.	GC 34090	FINAL DISPOSITION BY SETTLEMENT OR COURT JUDGMENT + 2 YRS.		
	<ul style="list-style-type: none"> <li>ADDRESS FILE RECORDS FOR WHICH THE ADDRESS CANNOT BE IDENTIFIED.</li> <li>ILLEGIBLE RECORDS.</li> <li>DRAFT &amp; UNEXECUTED REVOCABLE LICENSES.</li> <li>STAFF REPORTS MARKED "DRAFT."</li> <li>UNSIGNED RESOLUTIONS.</li> </ul>	N.S.S.A.	NONE	DISCARD.	DEST. AUTH. NOT REQ'D.
DG	<b>POSTING &amp; DOCUMENT DISTRIBUTION LOG</b> <ul style="list-style-type: none"> <li>NOTICE OF HEARING.</li> <li>AFFIDAVITS OF PUBLICATION.</li> <li>POSTED AGENDAS.</li> <li>NOTICE OF ACTION RE. DESIGN REVIEW.</li> <li>COURTESY NOITCE – PENDING BUILDING PERMIT.</li> <li>NOTICES OF VACANCY ON CITY COMMITTEES.</li> <li>MISC. NOTICES AND POSTINGS.</li> </ul>	GC 34090, 34090.5	2 YRS.	5 YRS.	INCLUDES POSTING & NOTICING FOR ALL CITY DEPTS. EXCEPT CITY ENGINEER.
DH	<b>PRE-CONSTRUCTION MEETING AUDIO RECORDINGS</b>	N.S.S.A.	NONE	2 YRS.	
<b>PROPERTY &amp; VEHICLE SCHEDULES FOR INSURANCE – SEE RISK MANAGEMENT</b>					



CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
<b>PUBLIC PROPERTY – SEE CITY PROPERTY</b>					
<b>PUBLIC WORKS MAINTENANCE FUNCTION</b>					
DK	<ul style="list-style-type: none"> <li>FUEL LOGS</li> <li>VEHICLE SMOG REPORTS</li> <li>SWEEPER STREET LOGS</li> </ul>	N.S.S.A.	2 YRS.		
DL	<ul style="list-style-type: none"> <li>PLAYGROUND SAFETY INSPECTION RECORDS.</li> <li>RECORD OF DEPARTMENTAL SAFETY MEETINGS.</li> <li>EPA ID NUMBER</li> <li>DOCUMENTS RE. MCSTOPPP MARIN STORMWATER PROGRAM</li> <li>VEHICLE MAINTENANCE LOGS</li> </ul>	GC 34090, 34090.5	ORIGINAL OR L.F. - 2 YRS.	MIN. 3 YRS.	
DM	FUEL TANK TESTING & COMPLIANCE RECORDS.	GC 34090, 34090.5	2 YRS.	3 YRS. OR OTHER SUCH TIME LIMIT AS MAY BE SET BY STATUTE	
AUCTION OF CITY PROPERTY –SEE FINANCE DEPARTMENT					
OPERATION & MAINTENANCE MANUALS					
			LIFE OF ITEM + 2 YRS.	LIFE OF ITEM + 2 YRS.	DEST. AUTH. NOT REQ'D.
<b>PUBLIC WORKS PROJECTS - CONSTRUCTION</b>					
CONTRACTS – SEE CONTRACTS					
DN	<ul style="list-style-type: none"> <li>CHANGE ORDERS.</li> <li>CORRESPONDENCE WITH OTHER AGENCIES, RESIDENTS, CONTRACTORS, CONSULTANTS, &amp; UTILITIES.</li> <li>DAILY REPORTS.</li> <li>FIELD DIRECTIVES.</li> <li>INVOICES &amp; EXPENSES.</li> <li>GRANT DOCUMENTS</li> <li>MATERIAL TAGS.</li> <li>MEETING MINUTES.</li> <li>NEWS ITEMS.</li> <li>PAYMENTS.</li> <li>PAYROLLS, CERTIFIED.</li> <li>PHOTOS, CD'S, &amp; VIDEOS OF PROJECT.</li> <li>PRELIMINARY DESIGNS.</li> <li>PRELIMINARY LIENS.</li> <li>PROJECT CLOSE-OUT.</li> <li>PROJECT INSPECTOR.</li> <li>PROJECT SPECIFIC FILES (E.G. TRADES, SPECIAL ITEMS, ETC.)</li> <li>REQUESTS FOR QUOTATION</li> <li>SCHEDULES.</li> <li>REQUESTS FOR INFORMATION.</li> <li>SUBMITTALS.</li> </ul>	GC 34090, 34090.5	2 YRS.		PROJECT FILES ARE TO BE KEPT IN HARD COPY IN THE OFFICE OF THE CITY ENGINEER UNTIL SUCH TIME AS THERE IS NO LONGER ROOM FOR THEM. THEN ALL OF THE DOCUMENTS FOR A SINGLE PROJECT, LISTED HERE, ARE TO BE SCANNED INTO L.F. THE SCANNED FILES MAY BE RETAINED INDEFINITELY IF THEY CONTINUE TO BE OF USE.

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
DO	<ul style="list-style-type: none"> <li>BIDS &amp; AWARD.</li> <li>CONSULTANT SELECTION.</li> <li>ESTIMATES &amp; BUDGETS.</li> <li>GEOTECHNICAL REPORTS.</li> <li>MAPS (OTHER THAN ASSESSMENT DISTRICT MAPS)</li> <li>POSTED &amp; PUBLISHED NOTICES &amp; AFFIDAVITS OF PUBLICATION.</li> </ul>	GC 34090, 34090.5	2 YRS.	MINIMUM - 5 YRS.	
DP	<ul style="list-style-type: none"> <li>SPECIAL CONSULTANT REPORTS.</li> <li>SPECIFICATIONS &amp; ADDENDUMS.</li> </ul>			MINIMUM – 10 YRS.	
DQ	<ul style="list-style-type: none"> <li>WARRANTIES</li> <li>OPERATION &amp; MAINTENANCE MANUALS</li> </ul>			MINIMUM - LIFE OF WARRANTY/ITEM + 2 YRS.	
	<ul style="list-style-type: none"> <li>PROJECT PLANS, FINAL.</li> <li>PROJECT SURVEYS.</li> </ul>			ORIGINAL &/OR L.F. - PERM.	FLAT FILE
	<ul style="list-style-type: none"> <li>INSPECTION &amp; TESTING.</li> <li>PERMITS/APPROVALS</li> </ul>			ORIGINAL &/OR L.F. - PERM.	
<b>PUBLIC WORKS PROJECTS – OTHER THAN CONSTRUCTION PROJECTS</b>					
DR	DREDGING PROJECTS	GC 34090, 34090.5	2 YRS.	10 YRS.	
DS	MMWD FIREFLOW PROJECTS	GC 34090, 34090.5	2 YRS.	5 YRS.	
	MMWD FIREFLOW PROJECT PLANS	GC 34090, 34090.5	2 YRS.	L.F. - PERM.	
DT	PG&E POLE REPLACEMENTS	GC 34090, 34090.5	2 YRS.	10 YRS.	
<b>RECRUITMENT – SEE PERSONNEL RECORDS</b>					
<b>RESOLUTIONS – SEE LEGISLATIVE RECORDS</b>					
	<b>REVOCABLE LICENSES</b>	GC 34090, 34090.5	EITHER P.O. OR L.F. - PERM.		
<b>RISK MANAGEMENT</b>					
DU	CONSENT TO SELF-INSURE	GC 34090 & 34090.5	2 YRS	ORIGINAL AND L.F., UNTIL SUPERCEDED +2	
DV	CLAIMS, LIABILITY: <ul style="list-style-type: none"> <li>COMPLETED CLAIM FORM</li> <li>ESTIMATES, PHOTOS, SUPPORTING DOCUMENTATION</li> <li>ALL CORRESPONDENCE RE CLAIM</li> <li>IN-HOUSE MEMOS</li> <li>INSTRUCTIONS USED FOR FILING ACTUAL CLAIMS</li> <li>INCIDENT REPORTS</li> </ul>	GC 25105.5	WHICHEVER DATE COMES FIRST: APPROVAL OR DENIAL BY COUNCIL; PMT OR SETTLEMENT; APPROVAL OR DENIAL BY OPERATION OF LAW. ORIGINAL. DATE + 5 YRS. EITHER ORIGINAL OR L.F..	L.F.--FINAL DISPO. + 5	AFTER SCANNING, RETAIN PAPER COPIES ONLY AS LONG AS NEEDED FOR EASY REFERENCE.
DW	CITY'S INSURANCE COVERAGES INCLUDING, BUT NOT LIMITED TO: LIABILITY; PROPERTY; SPECIAL EVENT; EMPLOYEE CRIME, SURETY, & BONDS; WORKER'S COMP <ul style="list-style-type: none"> <li>CERTIFICATES</li> <li>MEMORANDUM OF COVERAGE</li> <li>APPLICATION FOR COVERAGE</li> </ul>	GC 34090, 34090.5	2 YRS	EITHER P.O. OR L.F. – DATE DOCUMENT SUPERCEDED + 5 YRS	L.F. IMMEDIATELY FOR BACKUP & EASY ACCESS
DX	DOCUMENTS OF INSURANCE JPA'S OF WHICH THE CITY IS A MEMBER <ul style="list-style-type: none"> <li>BYLAWS</li> <li>CLAIMS POLICY</li> <li>ACTUARIAL STUDIES AND PREMIUM CALCULATIONS</li> </ul>	GC 34090, 34090.5	2 YRS	EITHER P.O. OR L.F. – DATE DOCUMENT SUPERCEDED + 5 YRS	L.F. IMMEDIATELY FOR BACKUP & EASY ACCESS
DY	DOCUMENTS OF INSURANCE JPA'S OF WHICH THE CITY IS A	GC 34090, 34090.5	EITHER P.O. OR L.F. – 2 YRS	P.O.--2 YRS.	DO NOT L.F.

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	MEMBER: <ul style="list-style-type: none"> <li>ANNOUNCEMENTS, AGENDAS, MINUTES, AND HANDOUTS FROM TRAINING SESSIONS AND MEETINGS OF BOARD &amp; COMMITTEES</li> <li>CORRESPONDENCE REGARDING ATTENDANCE AT TRAINING AND JPA MEETINGS; OTHER CORRESPONDENCE ON NON-SUBSTANTIVE TOPICS</li> <li>E-MAILS, MEMOS AND ADVISORIES SENT TO ALL JPA MEMBERS.</li> <li>QUARTERLY REPORTS</li> </ul>				
DZ	DOCUMENTS OF INSURANCE JPA'S OF WHICH THE CITY IS A MEMBER <ul style="list-style-type: none"> <li>APPLICATION TO JOIN JPA</li> <li>INITIAL ACTUARIAL REPORT</li> <li>CALCULATION OF INITIAL DEPOSITS &amp; OTHER</li> <li>SUBSTANTIVE DOCUMENTS RE INITIAL MEMBERSHIP IN JPA</li> </ul>	GC 34090, 34090.5	2 YRS	EITHER P.O. OR L.F. – DATE SEPARATED FROM JPA + 5 YRS	
EA	RISK ASSESSMENTS PERFORMED BY INSURANCE JPA'S AND OUTSIDE CONSULTANTS	GC 34090, 34090.5	EITHER P.O. OR L.F. – 2 YRS	EITHER PAPER OR ELECTONIC ORIGINALS-- UNTIL NO LONGER NEEDED, BUT AT LEAST 2 YRS.	
EB	PROPERTY SCHEDULES	GC 34090, 34090.5	2 YRS	EITHER P.O. OR L.F. – DATE DOCUMENT SUPERCEDED + 5 YRS	L.F. IMMEDIATELY FOR BACKUP & EASY ACCESS
	<b>ROSTERS</b> PHONE ROSTERS OF CITY EMPLOYEES & VOLUNTEERS, PREPARED FOR STAFF USE OR PUBLIC DISTRIBUTION.	GC 34090, 34090.5	2 YRS. OR SUCH LONGER PERIOD AS MAY BE REQUIRED BY STATUTE		DEST. AUTH. NOT REQ'D.
<b>SOCIAL MEDIA – SEE WEBSITE POSTINGS</b>					
EC	<b>SEWER LATERAL VIDEOS SUBMITTED WITH APPLICATION FOR AN R.B.R.</b>	GC 34090, 34090.5	ORIGINAL – 2 YRS.		
<b>STATEMENT OF ECONOMIC INTEREST – SEE FPPC FORMS</b>					
<b>SUBDIVISIONS</b>					
ED	SUBDIVISION DOCUMENTS, OTHER THAN MAPS, WHICH ARE NOT RETAINED BY THE PLANNING DEPARTMENT	GC 34090, 34090.5	ORIGINAL OR L.F. - 2 YRS.	MINIMUM - 5 YRS.	
	SUBDIVISION MAPS – <i>SEE MAPS &amp; DIAGRAMS</i>				
	<i>SEE ALSO PLANNING ADDRESS FILES</i>				
<b>SURVEYS</b>					
	SURVEY LOGS			L.F. - PERM.	
	<ul style="list-style-type: none"> <li>MONUMENT LOGS</li> <li>BENCH MARK LOGS</li> </ul>			L.F. - PERM.	GIS LAYER
	MAPS – <i>SEE MAPS &amp; DIAGRAMS</i>				
	<b>TITLES 18, 19, 20 &amp; 21 – SUBJECT FILES RE. PROPOSED AMENDMENTS</b>	GC 34090, 34090.5	2 YRS.	L.F. – PERM..	

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
EE	<b>TRAFFIC STUDIES</b>	GC 34090, 34090.5	2 YRS.	L.F. - 20 YRS.	
	<b>TWITTER – SEE WEBSITE POSTINGS</b>				
	<b>UTILITY UNDERGROUNDING</b>				
EF	<ul style="list-style-type: none"> <li>UTILITY UNDERGROUNDING – GENERAL</li> <li>UTILITY UNDERGROUNDING – SPECIFIC ‘PROPOSED’ DISTRICTS &amp; DISTRICTS WHICH WERE CONTEMPLATED BUT NEVER FORMED.</li> <li>GENERAL SUBJECT FILES FOR OTHER AGENCIES (E.G. BCDC, SANITARY DIST. 5, JPA, ETC.)</li> <li>NATIONAL FLOOD INSURANCE - GENERAL</li> </ul>	GC 34090, 34090.5	2 YRS.	MINIMUM - 10 YRS.	
	ASSESSMENT DISTRICT MAPS			ORIGINAL &/OR L.F. - PERM.	
EG	<ul style="list-style-type: none"> <li>UTILITY UNDERGROUNDING – GENERAL</li> <li>UTILITY UNDERGROUNDING – SPECIFIC ‘PROPOSED’ DISTRICTS &amp; DISTRICTS WHICH WERE CONTEMPLATED BUT NEVER FORMED.</li> </ul>	GC 34090, 34090.5	2 YRS.	MINIMUM - 10 YRS.	
	<b>VEHICLE MAINT. RECORDS – SEE PUBLIC WORKS MAINTENANCE FUNCTION</b>				
	<b>VEHICLE RECORDS</b>				
	VEHICLE TITLE	N.S.S.A.		LIFETIME OF VEHICLE OR SALE + 2 YRS.	DEST. AUTH. NOT REQ'D.
EH	<b>VOICE MAIL</b> SUBSTANTIVE VOICE MAILS RECEIVED BY CITY EMPLOYEES & MEMBERS OF LEGISLATIVE BODIES <u>NOT OTHERWISE RETAINED UNDER ANOTHER CATEGORY IN THIS RETENTION SCHEDULE. SEE BELVEDERE ADMINISTRATIVE POLICY 7.2.</u>	GC 34090, 34090.5	EITHER VOICE RECORDING, TRANSCRIPT, OR L.F. OF TRANSCRIPT - 2 YRS.	<u>L.F. OF EITHER AUDIO FILE, TRANSCRIPT, OR DETAILED SYNOPSIS, OR L.F. OF THE ABOVE - 2 YRS.</u>	
EI	<b>WEBSITE POSTINGS</b> THIS CATEGORY PERTAINS ONLY TO RECORDS WHICH ARE NOT RETAINED ELSEWHERE IN THE CITY’S FILES AND ARCHIVES. <ul style="list-style-type: none"> <li>WRITINGS, IMAGES, AUDIO &amp; VIDEO POSTED BY CITY OFFICIALS/EMPLOYEES TO CITY-CONTROLLED WEB PAGES: WEBSITE, FACE BOOK PAGE, BLOG, TWITTER PAGE, ETC.</li> <li>WRITINGS, IMAGES, AUDIO &amp; VIDEO POSTED BY CITY OFFICIALS/EMPLOYEES, AS CITY REPRESENTATIVES, TO WEB PAGES NOT CONTROLLED BY THE CITY.</li> <li>WRITINGS, IMAGES, AUDIO &amp; VIDEO POSTED BY THE PUBLIC TO CITY-CONTROLLED WEB PAGES.</li> </ul>	N.S.S.A.		2 YEARS.	
	<b>WEEKLY STATUS REPORT</b>			DESTROY AFTER READING.	PRIVILEGED & CONFIDENTIAL. NOT INTENDED TO BE RETAINED.
	<b>WORKERS’ COMPENSATION – CITY EMPLOYEES</b>				
EJ	CLAIMS FILES	CCR TITLE 8 §10102	*		L.F. AND

CO DE	DOCUMENT	REFERENCE	STAT. MIN.	C.O.B., IF DIFFERENT	NOTES
	*( A) ALL CLAIM FILES SHALL BE MAINTAINED AT LEAST UNTIL THE LATEST OF THE FOLLOWING DATES: (1) FIVE YRS. FROM THE DATE OF INJURY; (2) ONE YEAR FROM THE DATE COMPENSATION WAS LAST PROVIDED; (3) ALL COMPENSATION DUE OR WHICH MAY BE DUE HAS BEEN PAID; (4) IF AN AUDIT HAS BEEN CONDUCTED WITHIN THE TIME SPECIFIED IN (A)(1), UNTIL THE FINDINGS OF AN AUDIT OF THE FILE HAVE BECOME FINAL. (B) OPEN AND CLOSED CLAIM FILES MAY BE MAINTAINED IN WHOLE OR IN PART IN AN ELECTRONIC OR OTHER NON-PAPER STORAGE MEDIUM.	& [§15400.2 APPLIES TO THE CLAIMS MGR., WHO IS THE THIRD PARTY ADMINISTRATOR]			DESTROY ORIGINALS AS SOON AS THEY ARE NO LONGER NEEDED FOR EASE OF REFERENCE.
EK	<ul style="list-style-type: none"> <li>• CLAIMS REPORTS (LOSS ANALYSIS REPORTS).</li> <li>• SAFETY REPORTS (IN-HOUSE AND CONSULTANTS).</li> <li>• ACTUARIAL STUDIES.</li> </ul>	GC 34090, 34090.5	2 YRS. CITY	5 YRS., OR SUCH LONGER PERIOD AS MAY BE SET BY STATUTE.	CCAC. REC.: 5 YRS.
	<b>WORKERS' COMPENSATION CERTIFICATES PERTAINING TO BUILDING PERMITS</b>	N.S.S.A.	NONE	UNTIL SUPERCEDED OR UNTIL THE INSURED IS NO LONGER DOING BUSINESS WITHIN THE CITY.	DEST. AUTH. NOT REQ'D.
<b>WORKERS' COMPENSATION INSURANCE APPLICATIONS, MEMORANDA OF COVERAGE – SEE RISK MANAGEMENT</b>					

**ATTACHMENT B: CALIFORNIA STATE LAW REGARDING  
BUILDING DEPARTMENT RETENTION  
OF PLANS, SPECIFICATIONS, AND  
COMPUTATIONS FOR BUILDING PERMITS ISSUED**

**A. PLANS**


1. Single and multiple dwellings.
  - a. Keep, for the life of the building, plans for those which are:
    - i. over three stories (including the basement, if any);
    - ii. one story when the width between bearing walls is more than 25 feet.
    - iii. One story steel frame or concrete.
  - b. For all other dwellings, keep the plans for at least 180 days after completion.
2. Garages and other structures appurtenant to dwellings described in 1 above. Keep the plans for the same period as the plans for the main dwelling.
3. Common interest developments. Keep plans for the life of the building(s) for the following developments, which Civil Code Section 1351 designates as Common Interest Developments:
  - a. Community apartment projects.
  - b. Condominium projects.
  - c. Planned developments.
  - d. Stock cooperatives.
4. Farm or ranch buildings. Keep plans for at least 180 days after completion.
5. Buildings other than those specifically mentioned above (e.g. commercial and public buildings).
  - a. Keep, for the life of the building, plans for the following types of buildings:
    - i. One-story with more than 25 feet between bearing walls.
    - ii. One-story steel frame or concrete
    - iii. Over one-story.
  - b. For all others, keep the plans for at least 180 days after completion.

**B. ALL APPROVED CONSTRUCTION DOCUMENTS**

For any and every permit, keep at least 180 days after completion.

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Sections cited: California Health and Safety Code, Section 19850. California Code of Regulations, Title 24, Part 2, Volume 1, Section 107.5. California Code of Regulations, Title 24, Part 2.5, Section R106.5. (These supersede California Government Code, Section 34090 et seq.)

	<b>CITY OF BELVEDERE – ADMINISTRATIVE POLICY MANUAL</b>  <b>POLICY 7.6</b>  <b>RECORDS REQUESTS</b>		
	<b>Adoption Date:</b>	1/10/2006	<b>Adopted by:</b>
<b>Revised Date:</b>	n/a	<b>Revised by:</b>	n/a
<b>Authority:</b>	City Manager		

**7.6.1 COORDINATION OF REQUESTS**

Whenever possible, requests for City records shall be submitted on the City’s official form CITY OF BELVEDERE REQUEST FOR PUBLIC RECORDS. All records requests shall be stamped with the date received and submitted to the City Clerk who shall immediately forward them by email to the City Attorney. The City Attorney shall respond to the Requestor him/herself or delegate that responsibility to the ~~Deputy City Attorney~~ or City Clerk.

In all cases, the City Clerk shall be responsible for calendaring the 10-day deadline for the required first response to the Requestor and shall follow-up with the Office of the City Attorney, as necessary, to confirm that the deadline will be met.

When a search of City records is to be performed, the City Clerk shall coordinate the gathering of records. Department Heads shall be responsive to requests from the City Clerk to lend their staff members in assisting with the gathering of records as may be necessary. Documents may be reproduced in paper or electronic format according to the preference of the Requestor.

**7.6.2 RECORDS REQUESTS PURSUANT TO LEGAL ACTIONS**

For any request for records pursuant to a legal action to which the City is a party, the document package shall be reviewed by the City Attorney’s Office for approval before it is released to the Requestor.

**7.6.3 COPIES TO BE KEPT**

The City Clerk shall keep a copy of all records requests and document packages in a confidential directory on the City’s Laserfiche system.





CITY OF BELVEDERE – ADMINISTRATIVE POLICY MANUAL

**POLICY 7.7**

**CONTACT INFORMATION FOR  
PUBLIC OFFICIALS**

<b>Adoption Date:</b>	9/8/2006	<b>Adopted by:</b>	unknown
<b>Revised Date:</b>	11/2006 1/2012	<b>Revised by:</b>	unknown unknown
<b>Authority:</b>	City Manager		

The following protocol is enacted to protect the privacy of Belvedere’s residents and to ensure that their wishes are respected regarding the dissemination of their personal contact information. The following guidelines are in compliance with Section 6254.21(a) of the California Government Code.\*

1. “Public official,” for the purposes of this policy, means all members of the City Council, Planning Commission, and all volunteer committees and boards composed in whole or in part by residents of Belvedere.
2. The City Clerk is responsible for maintaining the official City record of contact information for public officials and for updating and distributing rosters intended for use by the staff, committee members, and the public.
3. Changes in contact information shall be made through the City Clerk to avoid confusion and assure uniform compliance with this policy.
4. All rosters and contact lists prepared for public officials shall be cleared with the City Clerk prior to distribution.
5. The residence address of persons speaking in an open meeting shall be included in the minutes only if announced by the speaker.
6. Application forms and the contact information they contain are considered public information and may appear on the City’s website and public documents such as staff reports, agenda packets and meeting minutes unless the applicant specifically requests the withholding of that information.
7. Except in the cases described in Nos. 5 and 6 above, personal contact information for public officials and city employees—e.g. home and work addresses, phone numbers, email—shall not be published on the City website or in any document intended for distribution to the general public, unless that individual has requested it in writing for a specific purpose.
8. Personal contact information of public officials may be included in rosters intended for distribution to the staff or to fellow committee members of the individual.

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\* No state or local agency shall post the home address or telephone number of any elected or appointed official on the Internet without first obtaining the written permission of that individual.