



MEMORANDUM

TO: City Council

FROM: Jessica Matson, Director of Legislative & Information Services/
City Clerk

SUBJECT: Modifications to the Citywide Records Retention Schedule

DATE: May 13, 2025

RECOMMENDATION:

- 1) Adopt a Resolution approving a modified Citywide Records Retention Schedule and authorizing the destruction of certain City records; and
- 2) Determine that adopting the Resolution is not a project subject to the California Environmental Quality Act ("CEQA") because it has no potential to result in either a direct, or reasonably foreseeable indirect, physical change in the environment. (State CEQA Guidelines, §§ 15060 (c)(2) and (3), 15378.)

IMPACT ON FINANCIAL AND PERSONNEL RESOURCES:

There is no direct impact on financial and personnel resources as a result of the recommended action. The City will continue to realize significant savings both in reduced labor and storage expenses associated with ongoing records maintenance and appropriate records destruction established through the modified comprehensive Records Retention Schedule.

BACKGROUND:

In January 2009, a Citywide Records Management Program ("Program") was developed, which included the creation of a comprehensive Citywide Records Retention Schedule. The purpose of the Program is to apply efficient and economical methods to the creation, utilization, maintenance, retention, preservation, and disposal of all City records, consistent with all relevant legal requirements. At its January 27, 2009, meeting, the City Council adopted a Resolution approving the Citywide Records Retention Schedule and authorizing destruction of certain City records.

In 2011, staff conducted a comprehensive review and update of the Citywide Records Retention Schedule to reflect organizational changes that occurred as a result of a major restructuring of City departments that became effective with the adoption of the Fiscal Year 2009-10 Budget. On October 11, 2011, the Council adopted a Resolution approving

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a modified Citywide Records Retention Schedule to reflect the substantive organizational changes that occurred, as well as other updates reflective of changes in State law.

In November 2020, staff conducted a review and update of the Citywide Records Retention Schedule to reflect organizational changes that occurred as a result of the restructuring of City departments. On November 24, 2020, the Council adopted a Resolution approving a modified Citywide Records Retention Schedule to reflect the substantive organizational changes that occurred, as well as other updates reflective of changes in State law.

ANALYSIS OF ISSUES:

Since the update of the Citywide Records Retention Schedule in 2020, the City has experienced further restructuring of City departments, which has resulted in a need to again substantially modify the Citywide Records Retention Schedule to reflect the current organizational structure. The Council had authorized the City Clerk, in consultation with the City Manager and City Attorney, to review State and Federal regulations on an annual basis and to update the Schedule, as appropriate, based on changes in the law. However, staff believes that the substantial modifications needed to the functional layout and organization of the Schedule, in combination with the length of time since the last legal review and update to reflect changes in State law, warrants Council review and consideration, and should be adopted again by Resolution.

There have been various updates in State law and technology regarding the management of records. Therefore, the Schedule was reviewed in depth to ensure that it provides clear, specific records descriptions and retention periods. The review and update process included individual meetings with staff from each department and several revisions of each retention schedule to ensure the records were identified and presented in an easy-to-use, accurate and complete manner.

Substantive changes include the physical reorganization of retention schedules to correctly reflect the various Divisions under each Department. For example, the City's engineering function was transferred from the Community Development Department to the Public Works Department. Consequently, records relating to engineering were relocated from the Community Development Department retention schedule to the Public Works Department retention schedule. Movement of other divisions among departments was also reflected in the update. Other changes, including the addition or deletion of specific records and legal updates to Code citations or retention periods, were made throughout each Department's retention schedule.

The appropriate Department Records Representative, Department Director, City Clerk, City Manager, and City Attorney have reviewed and approved the proposed modifications to the Retention Schedules.

ALTERNATIVES:

The following alternatives are provided for the Council's consideration:

1. Adopt the Resolution approving the modified Records Retention Schedule;
2. Modify records retention periods and adopt the Resolution;
3. Do not adopt the Resolution and retain the existing Records Retention Schedule;
or
4. Provide direction to staff.

ADVANTAGES:

By updating the Citywide Records Retention Schedule, it will reflect the current organizational structure and responsibility for the maintenance and disposition of City records, as well as provide legal updates that have occurred regarding the retention and disposition of City records.

DISADVANTAGES:

No disadvantages have been identified.

ENVIRONMENTAL REVIEW:

No environmental review is required for this item. Adopting the Resolution is not a project subject to the California Environmental Quality Act ("CEQA") because it has no potential to result in either a direct, or reasonably foreseeable indirect, physical change in the environment. (State CEQA Guidelines, §§ 15060 (c)(2) and (3), 15378.)

PUBLIC NOTIFICATION AND COMMENTS:

The Agenda was posted at City Hall and on the City's website in accordance with Government Code Section 54954.2.

ATTACHMENTS:

1. Resolution