

RECORDS RETENTION SCHEDULE BY TYPE – CLERK OF THE BOARD

Approved by Clerk of the Board March 6, 2014

Amended by Controller April 3, 2014

RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE	
1	ACCOUNTING/ FINANCE	ACCOUNTING, ACCOUNTING/ FINANCIAL DOCUMENTATION	CLERKS OFFICE - ADMIN	Storage	5 Years, or term stipulated by the funding source if >5 years	2 Years	3 Years	General accounting/financial documentation which may include journal entries, direct payment requests, encumbrance payment requests (FAMIS), purchase orders, and replenishment of revolving funds. For invoices and associated documents to support payment, retain for 5 years or the length stipulated by the funding source if greater than 5 years. Retention per the Controller's guidelines.	Admin. Code §8; Controller's Retention Schedule 3/6/13
2	ACCOUNTING/ FINANCE	ACCOUNTING, CASH RECEIPTS	CLERKS OFFICE - ADMIN	Current	5 Years	5 Years	N/A	Deposits to Treasurer (Fees & Refund Checks). Retention per the Controller's retention guidelines. Admin Code 8.3, "Current records and storage records, as defined in Section 8.4 of this Code, may be destroyed five years after they were created if they have served their purpose and are no longer required for any public business or other public purpose, except that records pertaining to financial matters shall be destroyed only after approval by the Controller; those having legal significance only after approval by the City Attorney; and payroll checks, time cards and related documents only after approval by the Retirement Board."	Admin. Code §8; Controller's Retention Schedule 3/6/13
3	ACCOUNTING/ FINANCE	ACCOUNTING, INTER- DEPARTMENTAL WORK ORDER	CLERKS OFFICE - ADMIN	Current	5 Years	5 Years	N/A	Work order from various performing departments. Retention per the Controller's retention guidelines Admin Code 8.3, "Current records and storage records, as defined in Section 8.4 of this Code, may be destroyed five years after they were created if they have served their purpose and are no longer required for any public business or other public purpose, except that records pertaining to financial matters shall be destroyed only after approval by the Controller; those having legal significance only after approval by the City Attorney; and payroll checks, time cards and related documents only after approval by the Retirement Board."	Admin. Code §8; Controller's Retention Schedule 3/6/13
4	ACCOUNTING/ FINANCE	ACCOUNTING, SERVICE CONTRACTS	CLERKS OFFICE - ADMIN	Current	Contract Life + 10 Years, or term required by funding source	Contract Life + 10 Years, or term required by funding source	N/A	Contracts for professional and specialized services. Retention per the Controller's retention guidelines Admin Code 8.3, "Current records and storage records, as defined in Section 8.4 of this Code, may be destroyed five years after they were created if they have served their purpose and are no longer required for any public business or other public purpose, except that records pertaining to financial matters shall be destroyed only after approval by the Controller; those having legal significance only after approval by the City Attorney; and payroll checks, time cards and related documents only after approval by the Retirement Board."	Admin. Code §8; Controller's Retention Schedule 3/6/13

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5	ACCOUNTING/ FINANCE	ACCOUNTING, CITYWIDE, DISASTER / COST RECOVERY DOCUMENTATION	CLERKS OFFICE - ADMIN	Current	3 Years from Date of Project Closing	3 Years from Date of Project Closing	N/A	<p>All documents relating to emergency disaster for cost recovery programs and activities, including project worksheet files (applies to all financial and programmatic records, supporting documents, statistical records, and other records of grantees or subgrantees for FEMA and CEMA grants)</p> <p>Any and all records relating to costs incurred during an emergency or disaster must be retained for cost recovery documentation in accordance with the Code of Federal Regulations 44 CFR §13.42. Records shall be retained for three (3) years from the date the Project Worksheet file is officially closed by receipt of a closure letter from the State of California (unless any litigation, claim, negotiation, audit or other action involving the records has been started before the expiration of the 3-year period. The records must be retained until completion of the action and resolution of all issues which arise from it, or until the end of the regular 3-year period, whichever is later.) Note: State and Federal regulations change from time-to-time, the Controller's Office will issue specific rules for file retention on any given disaster, should there be a change. California State regulations (Title 19 California Code of Regulations Section 2980 (e)) Specify an identical record retention period of 3 years from the close of the Project Worksheet file.</p> <p>This item has been included in the Clerk of the Board's retention schedule per the Office of the Controller's request. The Office of the Clerk of the Board may or may not have applicable records available for retention and will abide by retention durations as applicable. Retention is in accordance to Controller's guidelines.</p>	44 CFR §13.42; Title 19 California Code of Regulations Section 2980 (e); Controller's Retention Schedule 3/6/13
6	ACCOUNTING/ FINANCE	ACCOUNTING, CITYWIDE, STOP PAYMENT NOTICES	CLERKS OFFICE - ADMIN	Current	5 Years After Resolution of Issue	2 Years After Resolution of Issue	3 Years After Resolution of Issue	<p>Stop payment notices to City's contractors. Retention in accordance to Controller's guidelines. Years are measured by the end of the fiscal year.</p> <p>This item has been included in the Clerk of the Board's retention schedule per the Office of the Controller's request. The Office of the Clerk of the Board may or may not have applicable records available for retention and will abide by retention durations as applicable. Retention is in accordance to Controller's guidelines.</p>	Admin Code §8.3; Controller's Retention Schedule 3/6/13
7	ACCOUNTING/ FINANCE	ACCOUNTING, CITY AUDITS, AUDIT WORKPAPERS AND SUPPORTING DOCUMENTS FOR AUDIT REPORTS	CLERKS OFFICE - ADMIN	Current	7 years	7 years	N/A	<p>Audit workpapers and supporting documents for audit reports.</p> <p>This item has been included in the Clerk of the Board's retention schedule per the Office of the Controller's request. The Office of the Clerk of the Board may or may not have applicable records available for retention and will abide by retention durations as applicable. Retention is in accordance to Controller's guidelines.</p>	Admin Code §8.3; Controller's Retention Schedule 3/6/13

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8	ACCOUNTING/ FINANCE	ACCOUNTING, CITY AUDITS, CITY DEPARTMENT AUDIT REPORTS OF BOARD OF SUPERVISORS	CLERKS OFFICE - ADMIN	Permanent	Permanent	Permanent	N/A	<p>City department audit reports of Board of Supervisors.</p> <p>This item has been included in the Clerk of the Board’s retention schedule per the Office of the Controller’s request. The Office of the Clerk of the Board may or may not have applicable records available for retention and will abide by retention durations as applicable. Retention is in accordance to Controller’s guidelines.</p>	Admin Code §8.3; Controller’s Retention Schedule 3/6/13
9	ACCOUNTING/ FINANCE	ACCOUNTING, GENERAL ADMIN, BUDGET DOCUMENTS / WORK PAPERS	CLERKS OFFICE - ADMIN	Current	2 Years	2 Years	N/A	<p>Budget documents and/or work papers</p> <p>This item has been included in the Clerk of the Board’s retention schedule per the Office of the Controller’s request. The Office of the Clerk of the Board may or may not have applicable records available for retention and will abide by retention durations as applicable. Retention is in accordance to Controller’s guidelines.</p>	Admin Code §8.3; Controller’s Retention Schedule 3/6/13
10	ACCOUNTING/ FINANCE	ACCOUNTING, GENERAL ADMIN, CONTRACT AND GRANT SELECTION DOCS	CLERKS OFFICE - ADMIN	Current	Contract Life + 20 years, or term required by funding source	Contract Life + 20 years, or term required by funding source	N/A	<p>Contract and grant selection documents: RFPs, RFQs, proposals and other responses & evaluations.</p> <p>This item has been included in the Clerk of the Board’s retention schedule per the Office of the Controller’s request. The Office of the Clerk of the Board may or may not have applicable records available for retention and will abide by retention durations as applicable. Retention is in accordance to Controller’s guidelines.</p>	Admin Code §8.3; Controller’s Retention Schedule 3/6/13
11	ACCOUNTING/ FINANCE	ACCOUNTING, GENERAL ADMIN, OFFSET DOCUMENTS OF AMOUNTS OWED TO THE CITY AND COUNTY OF SAN FRANCISCO	CLERKS OFFICE - ADMIN	Current	5 Years After Resolution of Issue	5 Years After Resolution of Issue	N/A	<p>Offset documents of amounts owed to the City and County of San Francisco.</p> <p>This item has been included in the Clerk of the Board’s retention schedule per the Office of the Controller’s request. The Office of the Clerk of the Board may or may not have applicable records available for retention and will abide by retention durations as applicable. Retention is in accordance to Controller’s guidelines.</p>	Admin Code §8.3; Controller’s Retention Schedule 3/6/13
12	ACCOUNTING/ FINANCE	ACCOUNTING, GENERAL ADMIN, EMPLOYEE REIMBURSEMENTS	CLERKS OFFICE - ADMIN	Current	5 years	5 years	N/A	<p>Employee reimbursements (Field Expense Reports, Travel Expense Vouchers)</p> <p>This item has been included in the Clerk of the Board’s retention schedule per the Office of the Controller’s request. The Office of the Clerk of the Board may or may not have applicable records available for retention and will abide by retention durations as applicable. Retention is in accordance to Controller’s guidelines.</p>	Admin Code §8.3; Controller’s Retention Schedule 3/6/13

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13	HUMAN RESOURCES	PAYROLL FILE	CLERKS OFFICE - ADMIN	Storage	Separation + 7 Years	Until Separation	7 Years	<p>Employee payroll file for the Board of Supervisors offices</p> <p>Permission from SFERS required prior to destruction. The Retirement Board must approve the destruction of all records pertaining to payroll checks, time cards and related documents (Admin Code Section 8.3). The Retirement Board reviews and approved each Department's Record Retention and Destruction Schedule.</p>	Admin Code §8.3
14	HUMAN RESOURCES	PAYROLL, TIME SHEET	CLERKS OFFICE - ADMIN	Storage	Separation + 7 Years	Until Separation	7 Years	<p>Submitted bi-weekly by each employee. Posted time sheets of all employees' attendance record, approved (signed) for each pay period.</p> <p>Permission from SFERS required prior to destruction. The Retirement Board must approve the destruction of all records pertaining to payroll checks, time cards and related documents (Admin Code §8.3). The Retirement Board reviews and approved each Department's Record Retention and Destruction Schedule.</p>	Admin Code §8.3
15	HUMAN RESOURCES	PERSONNEL FILE	CLERKS OFFICE - ADMIN	Storage	Separation + 7 Years	Until Separation	7 Years	<p>Official Employee Personnel Folder which holds personnel information, appointment data, disclosures, performance, and certain copies of payroll information for each employee. May elect to keep permanently. Destruction contingent on review/approval by SFERS (Admin Code §8.3).</p> <p>Per Controller Guidelines, "Permission from SFERS required prior to destruction. The Retirement Board must approve the destruction of all records pertaining to payroll checks, time cards and related documents (Admin Code §8.3). The Retirement Board reviews and approved each Department's Record Retention and Destruction Schedule."</p> <p>Per CSC Guidelines, "No sooner than seven (7) years after the final separation, the OEPF shall be destroyed in accordance with the destruction schedule and method described by CSC, except if there is outstanding litigation or action is pending with a regulatory agency and as otherwise required by the department's Records Retention and Destruction Policy."</p> <p>Per CSC Guidelines, "Prior to the destruction of an OEPF, a department shall prepare an Employment History Summary (EHS). The EHS shall be removed from an Official Employee Personnel File prior to the destruction of an OEPF. The EHS shall be retained by the department in the Former Employee's File. Notation shall be made on the EHS of the date and method of destruction of the employee personnel records. The EHS shall be kept in perpetuity."</p>	Admin. Code §8; CSC Personnel Records Guidelines

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16	HUMAN RESOURCES	PERSONNEL, EMPLOYEE HISTORY SUMMARY	CLERKS OFFICE - ADMIN	Storage, Permanent	Permanent	Until Separation	Permanent	<p>Employee's information and employment history summary. Permission from SFERS required prior to destruction.</p> <p>Per CSC Guidelines, "Prior to the destruction of an OEPF, a department shall prepare an Employment History Summary (EHS). The EHS shall be removed from an Official Employee Personnel File prior to the destruction of an OEPF. The EHS shall be retained by the department in the Former Employee's File. Notation shall be made on the EHS of the date and method of destruction of the employee personnel records. The EHS shall be kept in perpetuity."</p>	Admin. Code §8; CSC Personnel Records Guidelines
17	HUMAN RESOURCES	PERSONNEL, OATHS OF OFFICE, MEMBERS OF THE BOARD	CLERKS OFFICE - ADMIN	Current, Permanent	Permanent	Permanent	N/A	Original Oath of Office is retained by the County Clerk or appointing authority, and a copy maintained in their personnel file. Copy may follow Personnel File retention guidelines.	Admin. Code §8; CSC Personnel Records Guidelines
18	HUMAN RESOURCES	PERSONNEL, RECRUITMENT FILES	CLERKS OFFICE - ADMIN	Current	Active + 3 Years	3 Years	N/A	<p>Recruitment file that contains supporting documentation pertaining to the recruitment of a City job class (i.e. job announcement, application and resumes of applicants).</p> <p>As per CSC guidelines, "Recruitment files may be destroyed after three (3) years if there is no litigation or review by regulatory agency pending except as otherwise required by departmental Record Retention and Destruction Policy." BOS may opt to retain for longer retention period if application & resume is filed under Personnel File</p>	Admin. Code §8; CSC Personnel Records Guidelines
19	HUMAN RESOURCES	PERSONNEL, WORKERS COMPENSATION FILES	CLERKS OFFICE - ADMIN	Storage	Separation + 7 Years	Until Separation	7 Years	<p>Log and summary for preparing Workers Comp. Quarterly report. 29 Code of Federal Regulations 1904.6.</p> <p>As per CSC guidelines, "Worker's Compensation records are destroyed in accordance to Civil Service Commission's (CSC) guidelines after duration of employment plus seven (7) years after final separation if there is no litigation or review by regulatory agency pending except as otherwise required by departmental Records Retention and Destruction Policy. Accident and injury reports retained and destroyed after five (5) years."</p>	29 Code of Federal Regulations 1904.6; CSC Personnel Records Guidelines
20	HUMAN RESOURCES	PERSONNEL, WORKERS COMPENSATION OR STATE DISABILITY INSURANCE	CLERKS OFFICE - ADMIN	Storage	Separation + 7 Years	Until Separation	7 Years	<p>Worker's Compensation or State Disability filed separate from Personnel File under Workers Compensation Medical File.</p> <p>As per CSC guidelines, "Worker's Compensation records are destroyed in accordance to Civil Service Commission's (CSC) guidelines after duration of employment plus seven (7) years after final separation if there is no litigation or review by regulatory agency pending except as otherwise required by departmental Records Retention and Destruction Policy. Accident and injury reports retained and destroyed after five (5) years."</p>	Admin. Code §8; CSC Personnel Records Guidelines

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21	MEETINGS	MEDIA RECORDINGS, CLOSED SESSION (DIGITAL)	CLERKS OFFICE - ADMIN	Current	1 Year	1 Year	N/A	<p>Audio media of Board and/or Committee meetings retained digitally online by IT for one year. The original audio recording is then turned over to the City Attorney's office for permanent retention.</p> <p>City Attorney's Office retains the original recordings. Audio/Video recordings are kept for at least 10 years, or permanently where feasible in accordance to Sunshine Ordinance § 67.8-1</p>	Admin. Code §8, §67
22	ARCHIVE/ HISTORICAL	ARCHIVE, HISTORY CARDS	CLERKS OFFICE - GENERAL	Current, Permanent	Permanent	Permanent	N/A	<p>Historical cards for legislative file indexing (1947-1986)</p> <p>Admin Code §8.9, "It is hereby declared that the public interest demands that various City and County records which would be essential to the continuity of government and the protection of rights and interests of individuals in event of a major disaster (hereinafter referred to as "essential records") be preserved against possible destruction by fire, earthquake, flood, enemy attack or other cause. It shall be the duty of each department head to develop a program for the selection and preservation of the essential records of the department and to arrange for safe storage of those essential records and duplicates thereof in the same manner as is provided for the storage of permanent records under Section 8.4 of this Code. "</p>	Admin. Code §8, §67
23	ARCHIVE/ HISTORICAL	ARCHIVE, JOURNAL INDEXES	CLERKS OFFICE - GENERAL	Current, Permanent	Permanent	Permanent	N/A	<p>Archived historical indexes for Board Journals (Minutes)</p> <p>Admin Code §8.9, "It is hereby declared that the public interest demands that various City and County records which would be essential to the continuity of government and the protection of rights and interests of individuals in event of a major disaster (hereinafter referred to as "essential records") be preserved against possible destruction by fire, earthquake, flood, enemy attack or other cause. It shall be the duty of each department head to develop a program for the selection and preservation of the essential records of the department and to arrange for safe storage of those essential records and duplicates thereof in the same manner as is provided for the storage of permanent records under Section 8.4 of this Code. "</p>	Admin. Code §8, §67

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24	ARCHIVE/ HISTORICAL	ARCHIVE, MUNICIPAL REPORTS	CLERKS OFFICE - GENERAL	Current, Permanent	Permanent	Permanent	N/A	Historical Board of Supervisors Municipal Reports. Digital archived copies also available on online via SFPL Historical Archives Center. Admin Code §8.9, "It is hereby declared that the public interest demands that various City and County records which would be essential to the continuity of government and the protection of rights and interests of individuals in event of a major disaster (hereinafter referred to as "essential records") be preserved against possible destruction by fire, earthquake, flood, enemy attack or other cause. It shall be the duty of each department head to develop a program for the selection and preservation of the essential records of the department and to arrange for safe storage of those essential records and duplicates thereof in the same manner as is provided for the storage of permanent records under Section 8.4 of this Code. "	Admin. Code §8, §67
25	BOARD & COMMISSION	BOARDS & COMMISSIONS FILES	CLERKS OFFICE - GENERAL	Current	Active	Active	N/A	Board & Commission files that contain rosters, vacancy notices, and board applications. Includes the Board & Commissions Mailing List (BCMCI), the database used to maintain Board & Commission Files and generate mailing lists. Admin Code, §8, §67; Gov. Code, §34090; Good Gov. Guide Part 3, Sec III. Admin. Code § 8.17. Unless otherwise provided in this Section, each City employee, official, department, board or commission shall use interdepartmental mail, electronic mail, fax or in-person delivery by a City staff member, rather than using U.S. mail or private express, messenger or overnight delivery services when sending documents to other City departments, offices or agencies. This Section shall not apply to documents that are urgent, time-sensitive or confidential, including, but not limited to, personnel records, legal memoranda, documents relating to subpoenas, court filings or administrative hearings and other attorney-client communications.[...] Further, it shall be the duty of the secretary or other executive officer of each board, commission or committee thereof, to update the mailing lists at least once annually for the meetings of their respective board, commission or committee in order to remove addresses of individuals or organizations who are no longer interested in receiving the materials or who are no longer residing or operating at the listed address.	Admin. Code §8, §67
26	BOARD & COMMISSION	OFFICE RECORDS, BOARD MEMBERS	CLERKS OFFICE - GENERAL	Current	Active + 1 Year	1 Year	N/A	Office working documents and records received from members of the Board upon their departure, to be retained by the Clerk's Office for reference to the following Board member. Not part of a legislative file.	Admin. Code §8, §67
27	COMMUNICATIONS	COMMUNICATIONS, COMMUNICATION ("C") PAGES	CLERKS OFFICE - GENERAL	Current	3 Years	3 Years	N/A	Communications and petition pages as it pertains to legislation, for reference, but not part of the official legislative file. AKA Subject Files. Note that Communication ("C") Pages that are included as part of the official legislative file are retained permanently in hard copy archives. Internal or interdepartmental City business Communication ("C") Pages may be retained for longer durations as relevant. See Admin. Code §67.23 to reference policy on Public Review File.	Admin. Code §8, §67

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28	COMMUNICATIONS	COMMUNICATIONS, GENERAL, COB	CLERKS OFFICE - GENERAL	Current	3 Years	3 Years	N/A	<p>General, non-legislative communications. May be disposed contingent that it will not be detrimental and has filled its purpose. Disposition to follow guidelines set by Admin. Code.</p> <p>Admin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters."</p>	Admin. Code §8, §67
29	COMMUNICATIONS	COMMUNICATIONS, LEGISLATIVE	CLERKS OFFICE - GENERAL	Current, Permanent	Permanent	Permanent	N/A	<p>Communications as it pertains to permanent legislative file, to be retained as supporting documentation. May include Communication "C" Pages</p>	Admin. Code §8, §67
30	LEGISLATIVE	LEGISLATIVE CORRESPONDENCE	CLERKS OFFICE - GENERAL	Storage, Permanent	Permanent	Active +3 Years	Permanent	<p>Legislative correspondence, such as Board of Supervisors and City Attorney (not privileged and confidential) communications, related to and retained in a Legislative File. May contain C-Pages. See "LEGISLATIVE FILE (OFFICIAL)". For file containing privileged and confidential information as it pertains to legislation, see "LEGISLATIVE FILE (CONFIDENTIAL)"</p>	Admin. Code §8, §67
31	LEGISLATIVE	LEGISLATIVE FILE (CONFIDENTIAL)	CLERKS OFFICE - GENERAL	Storage, Permanent	Permanent	Active +3 Years	Permanent	<p>File containing privileged and confidential legislative information, such as legislative opinions from the City Attorney. Retained as a separate section within the official legislative file.</p>	Admin. Code §8, §67
32	MEETINGS	CALENDAR, DEPARTMENT HEAD, COB	CLERKS OFFICE - GENERAL	Current	2 Years	2 Years	N/A	<p>Department head calendar.</p> <p>Admin Code §67.29-5 "The Mayor, The City Attorney, and every Department Head shall keep or cause to be kept a daily calendar wherein is recorded the time and place of each meeting or event attended by that official, with the exclusion of purely personal or social events at which no City business is discussed and that do not take place at City Offices or at the offices or residences of people who do substantial business with or are otherwise substantially financially affected by actions of the City. For meetings not otherwise publicly recorded, the calendar shall include a general statement of issues discussed. Such calendars shall be public records and shall be available to any requester three business days subsequent to the calendar entry date."</p>	Admin. Code §8, §67

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33	MEETINGS	MEDIA RECORDINGS, BOARD AND COMMITTEE MEETINGS	CLERKS OFFICE - GENERAL	Storage, Permanent	Permanent	N/A	Permanent	Digitally retained Board & Committee meetings Pursuant to Admin. Code 67.14(c) Every City policy body, agency or department shall audio or video every noticed regular meeting, special meeting, or hearing open to the public held in a City Hall hearing room that is equipped with audio or video recording facilities, except to the extent that such facilities may not be available for technical or other reasons. Each such audio or video recording shall be a public record subject to inspection pursuant to the California Public Records Act (Government Code Section 6250 et seq.), and shall not be erased or destroyed. [...]	Admin. Code §8, §67; Gov. Code §6250 et seq
34	MEETINGS	NOTES, BOARD CLOSED SESSION	CLERKS OFFICE - GENERAL	Current, Permanent	Permanent	Permanent	N/A	Closed session notes are confidential. The original audio recording is turned over to the City Attorney's office for permanent retention.	Admin. Code §8, §67
35	POLICY	POLICIES AND PROCEDURES, GENERAL, COB	CLERKS OFFICE - GENERAL	Current until superseded	Permanent Until Superseded	Permanent Until Superseded	N/A	General Policy and Procedures in effect under the Clerk of the Board	Admin. Code §8, §67
36	POLICY	POLICIES AND PROCEDURES, RULES OF ORDER, COB	CLERKS OFFICE - GENERAL	Current, Permanent	Permanent	Permanent	N/A	Rules of Order approved by the Board	Admin. Code §8, §67
37	REPORTS	REPORT, CITY ATTORNEY CLAIMS	CLERKS OFFICE - GENERAL	Current	3 Years	3 Years	N/A	Confidential quarterly report submitted by the City Attorney listing a summary of claims.	Admin. Code §8, §67
38	REPORTS	REPORT, FORM 700	CLERKS OFFICE - GENERAL	Storage	7 Years or Permanently as applicable	5 Years	2 Years or Permanently as applicable	Form 700 Statement of Economic Interests. The Ethics Commission is the official records holder for Form 700's for members of Boards and Commission. The Clerk of the Board is the filing officer for the department and may retain copies of Ethic's filings. Officials and Candidates Specified in Gov. Code §87200 and Members of Boards and Commissions of local agencies are required to file Fair Political Practices Commission's (FPPC) Form 700 Statement of Economic Interests. Also see Government Code section 81010 and 2 Cal. Code of Regs. section 18115 for the duties of filing officers and persons in agencies who make and retain copies of statements and forward the originals to the filing officer. As per CSC Personnel Records Guidelines, Form 700's are "Destroyed seven (7) years after date of filing if there is no litigation or review by regulatory agency pending except as otherwise required by departmental Records Retention and Destruction Policy. Pursuant to State law. Form 700 to be kept for seven (7) years."	Gov. Code §81009(d)(e), §81010, §87200; 2 Cal. Code of Regs. §18115, §18730, SF Campaign & Gov Conduct Code Article III Sec 1, CSC Personnel Records Guidelines

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39	REPORTS	REPORT, FORM 700 FILING OFFICER REPORTS	CLERKS OFFICE - GENERAL	Storage	7 Years or Permanently as applicable	5 Years	2 Years or Permanently as applicable	Form 700 Statement of Economic Interests Filing Officer Report. The Ethics Commission is the official records holder for Form 700's for members of Boards and Commission. The Clerk of the Board is the filing officer for the department and may retain copies of Ethic's filings. See Government Code §81010 and 2 Cal. Code of Regs. section 18115 for the duties of filing officers and persons in agencies who make and retain copies of statements and forward the originals to the filing officer.	Gov. Code §81010, §87200, 2 Cal. Code of Regs. §18115; CSC Personnel Records Guidelines
40	REPORTS	REPORT, FORM 803	CLERKS OFFICE - GENERAL	Storage	7 Years or Permanently as applicable	5 Years	2 Years or Permanently as applicable	Behested Payment Report. Fair Political Practices Commission (FPPC) report is for use by elected officers and members of the California Public Utilities Commission (CPUC) to disclose payments made at their behest, principally for legislative, governmental, or charitable purposes. Behested payments are payments made principally for legislative, governmental, or charitable purposes under Government Code Section 82015(b)(2)(B)(iii) & FPPC Regulation §18215.3	FPPC Regulation §18215.3; Gov Code §82015(b)(2)(B)(iii)
41	REPORTS	REPORT, FORM 806	CLERKS OFFICE - GENERAL	Storage	7 Years or Permanently as applicable	5 Years	2 Years or Permanently as applicable	Agency Report of Public Official Appointments. The Fair Political Practices Commission (FPPC) Form 806 is used to report additional compensation that officials receive when appointing themselves to positions on committees, boards, or commissions of a public agency, special district, or joint powers agency or authority. FPPC Regulation §18705.5.	FPPC Regulation §18705.5; Admin. Code §8
42	REPORTS	REPORT, REGULATION 18730, CONFLICT OF INTEREST CODES	CLERKS OFFICE - GENERAL	Current, Permanent	Permanent or Until Superseded	Permanent	N/A	Retained in accordance to Fair Political Practices Commission's (FPPC) Regulation §18730 (2 California Code of Regulations, §18730) provisions of Conflict of Interest Codes. The Political Reform Act ("Act") requires each state agency to adopt a conflict of interest code which lists the job classifications within the agency that must file a Statement of Economic Interests ("Form 700"). The Fair Political Practices Commission ("FPPC") administers the Act, which includes approving the codes for all state agencies and providing regulatory advice on the filing requirements associated with the Form 700. (Government Code §81000-91015. Officials and Candidates Specified in Gov. Code §87200 and Members of Boards and Commissions of local agencies are also required to file.	FPPC Regulation §18730; 2 Cal AC 18730; Admin. Code §8

RECORDS RETENTION SCHEDULE BY TYPE – CLERK OF THE BOARD

Approved by Clerk of the Board March 6, 2014

Amended by Controller April 3, 2014

	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
43	LEGISLATIVE	ELECTION MATERIALS (COPY)	CLERKS OFFICE - LEGISLATIVE	Current, Permanent	Permanent	Permanent	N/A	<p>Copies of documents sent to the Secretary of State concerning charter amendments passed by voters. It consists of ballot books, list of measures, and certification resolution. The official election file is with the Department of Elections, who assumed reporting responsibility in November of 2000.</p> <p>Admin. Code § 67.29-7(b). The Department of Elections must preserve all records and invoices relating to the design and printing of ballots and other election materials, as well as records documenting who had custody of ballots from the time ballots are cast until they are received and certified by the department.</p>	Admin. Code §8, §67
44	LEGISLATIVE	LEGISLATIVE FILE (OFFICIAL)	CLERKS OFFICE - LEGISLATIVE	Storage, Permanent	Permanent	Active +3 Years	Permanent	File containing information that is created, received or maintained by the BOS concerning a particular issue considered by the Board or its standing committee for action. May include Legislation (Copy of Ordinance, Copy of Resolution, Motion), amendments, Budget & Legislative Analyst reports, Public Correspondence ("C" pages), etc.	Admin. Code §8, §67
45	LEGISLATIVE	LEGISLATIVE TRACKING SYSTEM RECORDS (LEGISTAR)	CLERKS OFFICE - LEGISLATIVE	Current, Permanent	Permanent	Permanent	N/A	Digitally kept legislative records on Legislative Tracking System(s), which may include Board's agenda, agenda packet, minutes, copy of legislation, etc. For records 1997+ only.	Admin. Code §8, §67
46	LEGISLATIVE	PROOF OF PUBLICATION	CLERKS OFFICE - LEGISLATIVE	Storage, Permanent	Permanent	Active +3 Years	Permanent	Proof of publication for Board & Committee meeting notices/advertisements, retained with Legislative File (Official)Reference Admin. Code §67.5 Meetings to be open and public; Application of the Brown ActAdmin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters."	Admin. Code §8, §67
47	MEETINGS	AGENDA PACKET, BOARD	CLERKS OFFICE - LEGISLATIVE	Storage, Permanent	Permanent	Active +3 Years	Permanent	Agenda packet containing all items that have been assigned to the full Board. Includes final agenda and supporting documentation.	Admin. Code §8, §67
48	MEETINGS	AGENDA PACKET, COMMITTEE	CLERKS OFFICE - LEGISLATIVE	Storage, Permanent	Permanent	Active +3 Years	Permanent	Agenda packet containing all items that has been assigned to a particular Committee. Includes final agenda and supporting documentation.	Admin. Code §8, §67

RECORDS RETENTION SCHEDULE BY TYPE – CLERK OF THE BOARD

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	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
49	MEETINGS	AGENDA, BOARD	CLERKS OFFICE - LEGISLATIVE	Current	3 Years	3 Years	N/A	<p>Draft Agenda of items to be addressed by the Board during its meeting. Also reference retention item "AGENDA PACKET, BOARD" for the full final agenda packet, which is retained permanently.</p> <p>Digital version of agenda/agenda packet may also be available in Legistar, see "LEGISLATIVE TRACKING SYSTEM RECORDS (LEGISTAR)" for more information.</p>	Admin. Code §8, §67; Gov. Code § 54954, 54954.2
50	MEETINGS	AGENDA, COMMITTEE	CLERKS OFFICE - LEGISLATIVE	Current	3 Years	3 Years	N/A	<p>Draft Agenda of items to be addressed by the Committee during its meeting. Also reference retention item "AGENDA PACKET, COMMITTEE" for the full final agenda packet, which is retained permanently.</p> <p>Digital version of agenda/agenda packet may also be available in Legistar, see "LEGISLATIVE TRACKING SYSTEM RECORDS (LEGISTAR)" for more information.</p>	Admin. Code §8, §67
51	MEETINGS	LEGISLATION INTRODUCED (LI), BOARD	CLERKS OFFICE - LEGISLATIVE	Current	3 Years	3 Years	N/A	<p>Legislation Introduced (LI) and notes taken at regular meetings to create the Board Minutes. Board's meeting notes include the Legislation Introduced (LI). May include Speaker Cards, Legislation Introduced Report, Request Granted, etc. Posted online for minimum of three (3) years.</p> <p>Admin. Code §67.29-2. Each department of the City and County of San Francisco shall maintain on a World Wide Web site, or on a comparable, readily accessible location on the Internet, information that it is required to make publicly available. Each department is encouraged to make publicly available through its World Wide Web site, as much information and as many documents as possible concerning its activities. At a minimum, within six months after enactment of this provision, each department shall post on its World Wide Web site all meeting notices required under this ordinance, agendas and the minutes of all previous meetings of its policy bodies for the last three years. [...]</p>	Admin. Code §8, §67

RECORDS RETENTION SCHEDULE BY TYPE – CLERK OF THE BOARD

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	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
52	MEETINGS	MINUTES, BOARD	CLERKS OFFICE - LEGISLATIVE	Current, Permanent	Permanent	Permanent	N/A	<p>Official summary of actions and/or information covering points to be remembered of discussions or decisions made during the Board meeting. Sunshine Ordinance; Gov. Code § 25102, 36814, 40801. Permanently retained, available online for minimum three (3) years</p> <p>Gov. Code §25102. The board shall cause to be kept: (a) Its minute book.</p> <p>Gov. Code §36814. The council shall cause the clerk to keep a correct record of its proceedings. At the request of a member, the city clerk shall enter the ayes and noes in the journal.</p> <p>Gov. Code §40801. The city clerk shall keep an accurate record of the proceeding of the legislative body and the board of equalization in books bearing appropriate titles and devoted exclusively to such purposes, respectively. The books shall have a comprehensive general index.</p> <p>Admin. Code §67.29-2, "Each department of the City and County of San Francisco shall maintain on a World Wide Web site, or on a comparable, readily accessible location on the Internet, information that it is required to make publicly available. Each department is encouraged to make publicly available through its World Wide Web site, as much information and as many documents as possible concerning its activities. At a minimum, within six months after enactment of this provision, each department shall post on its World Wide Web site all meeting notices required under this ordinance, agendas and the minutes of all previous meetings of its policy bodies for the last three years. [...]"</p>	<p>Admin. Code §8, §67; Gov. Code § 25102, 36814, 40801</p>

RECORDS RETENTION SCHEDULE BY TYPE – CLERK OF THE BOARD

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53	MEETINGS	MINUTES, COMMITTEE (ONLINE)	CLERKS OFFICE - LEGISLATIVE	Current, Permanent	Permanent	Permanent	N/A	Official summary of actions and/or information covering points to be remembered of discussions or decisions made during the Committee meeting. Available in electronic format only through Legislative Tracking System. Sunshine Ordinance; Gov. Code § 25102, 36814, 40801 Gov. Code §25102. The board shall cause to be kept: (a) Its minute book.Gov. Code §36814. The council shall cause the clerk to keep a correct record of its proceedings. At the request of a member, the city clerk shall enter the ayes and noes in the journal.Gov. Code §40801. The city clerk shall keep an accurate record of the proceeding of the legislative body and the board of equalization in books bearing appropriate titles and devoted exclusively to such purposes, respectively. The books shall have a comprehensive general index.Permanently retained, available online for minimum three (3) years. Admin. Code §67.29-2, "Each department of the City and County of San Francisco shall maintain on a World Wide Web site, or on a comparable, readily accessible location on the Internet, information that it is required to make publicly available. Each department is encouraged to make publicly available through its World Wide Web site, as much information and as many documents as possible concerning its activities. At a minimum, within six months after enactment of this provision, each department shall post on its World Wide Web site all meeting notices required under this ordinance, agendas and the minutes of all previous meetings of its policy bodies for the last three years. [...]"	Admin. Code §8, §67 ; Gov. Code § 25102, 36814, 40801
54	REPORTS	GRAND JURY REPORTS & LETTERS	CLERKS OFFICE - LEGISLATIVE	Storage, Permanent	Permanent	5 Years	Permanent	Government Audit & Oversight Committee Grand Jury reports and letters. Requests from Civil Grand Jury to respond to Facts and Findings; goes on Agenda	Admin. Code §8, §67
55	REPORTS	REPORT, ECONOMIC ANALYSIS DETERMINATIONS	CLERKS OFFICE - LEGISLATIVE	Current	2 Years	2 Years	N/A	Report from Controller's office on determination of Economic impact. May also supplement legislative file.	Admin. Code §8, §67
56	REPORTS	REPORT, FISCAL IMPACT DETERMINATIONS	CLERKS OFFICE - LEGISLATIVE	Current	2 Years	2 Years	N/A	Report from the Budget Analyst noting whether a matter has or has no fiscal impact. May also supplement legislative file.	Admin. Code §8, §67

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	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
57	COMMUNICATIONS	COMMUNICATIONS, CLERK TO ACT	CLERKS OFFICE - OPERATIONS	Current	2 Years	2 Years	N/A	<p>A statement of actions to be performed by the department initiated by the Clerk of the Board that includes the document, Introduction Form, Letter of Inquiry, and the database tracking system. Electronic copies may be retained for longer durations in database. May be part of Minutes in some instances, which are retained permanently.</p> <p>Admin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters."</p>	Admin. Code §8, §67
58	COMMUNICATIONS	COMMUNICATIONS, IN MEMORIAM LETTERS	CLERKS OFFICE - OPERATIONS	Current	2 Years	2 Years	N/A	<p>Notice/letters of condolence sent to members of the public that were introduced by Supervisors at the Board meeting.</p> <p>Admin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters."</p>	Admin. Code §8, §67
59	LEGISLATIVE	MOTIONS, BOS (ORIGINAL)	CLERKS OFFICE - OPERATIONS	Current, Permanent	Permanent	Permanent	N/A	Original adopted Motions on redline. A formal proposal for action.	Admin. Code §8, §67

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60	LEGISLATIVE	ORDINANCES, BOS (ORIGINAL)	CLERKS OFFICE - OPERATIONS	Current, Permanent	Permanent	Permanent	N/A	<p>Original passed Ordinances on redline and bound clippings. A statute or regulation enacted that affects the citizens of San Francisco. Sunshine Ordinance; Gov. Code § 25102, 40806</p> <p>Gov. Code §25102. The board shall cause to be kept: [...] (b) An ordinance book. Gov. Code §40806. The city clerk shall keep a book marked "ordinances" and record in it all city ordinances with his certificate annexed to each, stating:</p> <p>(a) It is a true and correct copy of a city ordinance. (b) The ordinance number. (c) It has been published or posted pursuant to law.</p>	Admin. Code §8, §67; Gov. Code § 25102, 40806
61	LEGISLATIVE	RESOLUTIONS, BOS	CLERKS OFFICE - OPERATIONS	Current, Permanent	Permanent	Permanent	N/A	<p>Original approved Resolutions on redline and/or bound clippings. A formal statement of a decision or expression of opinion put before or adopted by the Board. Gov. Code § 25102.1</p> <p>Gov. Code §25102. The board shall cause to be kept: (a) Its minute book. Gov. Code §25102.1 . In lieu of entering resolutions in full in the minute book, the clerk, with the approval of the board, may keep a resolution book in which he shall enter all resolutions in full. In such case, references in the minute book to resolutions may be made by number and subject reference.</p>	Admin. Code §8, §67; Gov. Code §25102.1
62	LOGS & DATABASES	PUBLIC RECORDS/ INFORMATION REQUESTS, COB	CLERKS OFFICE - OPERATIONS	Current	3 Years	3 Years	N/A	<p>Public Records Requests pursuant to various Local, State, and/or Federal statutes, and information indicating records request from the Clerk's Office.</p> <p>Admin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters."</p>	Admin. Code §8, §67

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63	REPORTS	SB 90 REPORT/MANDATED COST REIMBURSEMENT	CLERKS OFFICE - OPERATIONS	Current	3 Years after date of first payment of claim, regardless of filing date	3 Years after date of first payment of claim, regardless of filing date	N/A	Monthly report required by State Law requesting reimbursement for fees expended by the City for State mandated cost. Retention schedule dictated by State's audit, retaining for minimum of 3 years after the date of the first payment of the claim, regardless of when it was filed. May retain for longer duration as required.	Admin. Code §8, §67
64	COMMUNICATIONS	COMMUNICATIONS, GENERAL, LAFCo	LAFCo	Current	3 Years	3 Years	N/A	<p>General, non-legislative communications. May be disposed contingent that it will not be detrimental and has filled its purpose. Disposition to follow guidelines set by Admin. Code §8; City Attorney Good Government Guide; CA Government Code 34090, 34090.5 and 34090.7.</p> <p>Admin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters."</p>	Admin. Code §8, §67
65	LEGISLATIVE	RESOLUTIONS, LAFCo	LAFCo	Storage, Permanent	Permanent	N/A	Permanent	Original Resolutions as it pertains to Local Agency Formation Commission (LAFCo). Sunshine Ordinance Admin. Code §67; Gov. Code §25102.1.	Admin. Code §8, §67
66	MEETINGS	AGENDA PACKET, LAFCo	LAFCo	Storage, Permanent	Permanent	N/A	Permanent	Full agenda packets as they pertain to Local Agency Formation Commission (LAFCo). Includes final agenda and supporting documentation, for permanent archival.	Admin. Code §8, §67
67	MEETINGS	AGENDA, LAFCo	LAFCo	Current	3 Years	3 Years	N/A	Draft agendas as they pertain to Local Agency Formation Commission (LAFCo). Also reference retention item "AGENDA PACKET, LAFCo" for the full final agenda packet, which is retained permanently.	Admin. Code §8, §67

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68	MEETINGS	MEDIA RECORDINGS, LAFCo	LAFCo	Storage, Permanent	Permanent	N/A	Permanent	Media recordings as they pertain to Local Agency Formation Commission (LAFCo). Pursuant to Admin. Code 67.14(c) Every City policy body, agency or department shall audio or video every noticed regular meeting, special meeting, or hearing open to the public held in a City Hall hearing room that is equipped with audio or video recording facilities, except to the extent that such facilities may not be available for technical or other reasons. Each such audio or video recording shall be a public record subject to inspection pursuant to the California Public Records Act (Government Code Section 6250 et seq.), and shall not be erased or destroyed. [...]	Admin. Code §8, §67
69	MEETINGS	MEETING NOTES, LAFCo	LAFCo	Current	3 Years	3 Years	N/A	Meeting notes as they pertain to Local Agency Formation Commission (LAFCo). Speaker cards may also fall under category as a current record.	Admin. Code §8, §67
70	MEETINGS	MINUTES, LAFCo	LAFCo	Storage, Permanent	Permanent	N/A	Permanent	Minutes/Journals as they pertain to Local Agency Formation Commission (LAFCo). Sunshine 67.29-2. Online for three (3) years. Admin. Code §§67.29-2. Each department of the City and County of San Francisco shall maintain on a World Wide Web site, or on a comparable, readily accessible location on the Internet, information that it is required to make publicly available. Each department is encouraged to make publicly available through its World Wide Web site, as much information and as many documents as possible concerning its activities. At a minimum, within six months after enactment of this provision, each department shall post on its World Wide Web site all meeting notices required under this ordinance, agendas and the minutes of all previous meetings of its policy bodies for the last three years. [...]	Admin. Code §8, §67

¹ "Current records" are records which for convenience, ready reference or other reason are retained in office space and equipment of the department involved.

"Storage records" are records which need not be retained in office space and equipment of the department involved, but which must be, or should be, prudently preserved for a time or permanently in the facilities of a records center, as specified in the following section.

"Permanent records" or essential records, are records required by law to be permanently retained. Unless otherwise required by law or regulation, permanent records shall be stored by microfilming the paper records or placing them on an optical imaging storage system, placing the original film or tape in a State-approved storage vault and delivering a copy to the department. The paper records may then be destroyed.

RECORDS RETENTION SCHEDULE BY TYPE – AAB
 Approved by AAB Administrator January 17, 2014

	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
1	ASSESSMENT APPEALS	ASSESSMENT APPEAL FILE, AAB	ASSESSMENT APPEALS BOARD (AAB)	Storage	Active +5 Years	Active +2 Years	3 Years	<p>File containing appeals to the AAB. May contain AAB application files, applications for change assessments, board instructions/party's responses, evidentiary documents, hearing officer's recommendation of value, and findings of fact.</p> <p>Cal. Code of Regulation, Title 18, Property Tax Rule 305(g), "RETENTION OF RECORDS. The clerk may destroy records consisting of assessment appeal applications when five years have elapsed since the final action on the application. The records may be destroyed three years after the final action on the application if the records have been microfilmed, microfiched, imaged, or otherwise preserved on a medium that provides access to the documents. As used in this subsection, "final action" means the date of the final decision by the board."</p> <p>Gov. Code §25105.5, "The clerk of the board of supervisors may, without complying with any other provision of law, destroy records consisting of claims against the county and claims against special districts for which the board of supervisors is the governing body, whenever the claims have been retained by the clerk for a period of not less than five years after final action on the claim. The clerk of the board of supervisors may destroy records consisting of assessment appeal applications when five years have elapsed since the final action on the application. The clerk may destroy the records three years after the final action on the application, if the records consisting of assessment appeal applications have been microfilmed, microfiched, imaged, or otherwise preserved on a medium that provides access to the documents, in accordance with Section 25105."</p>	Cal. Code of Regulation, Title 18, Property Tax Rule 305 ; Gov. Code §25105.5
2	ACCOUNTING/ FINANCE	ACCOUNTING, CASH RECEIPTS (AAB)	ASSESSMENT APPEALS BOARD (AAB)	Storage	10 Years After Date of Receipt (Active +10 Years)	Active + 5 Years	5 Years	<p>Cash receipts which include filing fees, hearing fees, and findings of fact fees that are paid as mandated for Assessment Appeals Board applications. Cash receipt of fees are pursuant to Administrative Code 2B.9: Administrative Processing Fee; 2B.10: Hearing Fee; and 2B.11: Findings of Fact Fee.</p>	Admin. Code 2B.9 , 2B.10 , 2B.11
3	ACCOUNTING/ FINANCE	ACCOUNTING, REFUNDS (AAB)	ASSESSMENT APPEALS BOARD (AAB)	Current	5 Years After Date of Refund Order (Active +5)	Active + 5 Years	N/A	<p>Refunds are due as a result of an invalid application, a taxpayer winning their case (see Admin Code 2B.10), or if a party withdraws its request for findings of fact.</p>	Admin. Code 2B.10

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4	COMMUNICATIONS	COMMUNICATIONS, GENERAL, AAB	ASSESSMENT APPEALS BOARD (AAB)	Current	3 Years	3 Years	N/A	<p>General correspondence pertaining to assessment appeals and other related issues, inter-departmental memos, and miscellaneous correspondence addressed to the AAB</p> <p>Admin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters. "</p>	Admin. Code §8, §67
5	MEETINGS	AGENDA, AAB	ASSESSMENT APPEALS BOARD (AAB)	Storage, Permanent	Permanent	5 Years	Permanent	<p>Agenda advising public of meetings pertaining to assessment appeal hearings, closed sessions, and special meetings. Retained permanently, available online for minimum three (3) years.</p> <p>Gov. Code §25105.5, "The clerk of the board of supervisors may, without complying with any other provision of law, destroy records consisting of claims against the county and claims against special districts for which the board of supervisors is the governing body, whenever the claims have been retained by the clerk for a period of not less than five years after final action on the claim. The clerk of the board of supervisors may destroy records consisting of assessment appeal applications when five years have elapsed since the final action on the application. The clerk may destroy the records three years after the final action on the application, if the records consisting of assessment appeal applications have been microfilmed, microfiched, imaged, or otherwise preserved on a medium that provides access to the documents, in accordance with Section 25105."</p> <p>Admin. Code §§67.29-2. Each department of the City and County of San Francisco shall maintain on a World Wide Web site, or on a comparable, readily accessible location on the Internet, information that it is required to make publicly available. Each department is encouraged to make publicly available through its World Wide Web site, as much information and as many documents as possible concerning its activities. At a minimum, within six months after enactment of this provision, each department shall post on its World Wide Web site all meeting notices required under this ordinance, agendas and the minutes of all previous meetings of its policy bodies for the last three years. [...]</p>	Admin. Code §8, §67, Gov. Code §25105.5

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	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
6	MEETINGS	ASSESSMENT HEARING FILE, AAB	ASSESSMENT APPEALS BOARD (AAB)	Storage	Active +5 Years	Active +3 Years	2 Years	<p>File containing information pertaining to the hearings and meetings of the AAB. This series documents the activities of the AAB.</p> <p>Gov. Code §25105.5, "[...] The clerk of the board of supervisors may destroy records consisting of assessment appeal applications when five years have elapsed since the final action on the application. The clerk may destroy the records three years after the final action on the application, if the records consisting of assessment appeal applications have been microfilmed, microfiched, imaged, or otherwise preserved on a medium that provides access to the documents, in accordance with Section 25105."</p>	Gov. Code §25105.5 ; CA Property Tax Code 305(g)
7	MEETINGS	MEDIA RECORDINGS, AAB	ASSESSMENT APPEALS BOARD (AAB)	Storage, Permanent	Permanent	3 Years	Permanent	<p>Audio or video transcripts of the Assessment Appeals Board proceedings – i.e. hearing tapes.</p> <p>Sunshine Ordinance Admin. Code §67.14(c) , "Every City policy body, agency or department shall audio or video every noticed regular meeting, special meeting, or hearing open to the public held in a City Hall hearing room that is equipped with audio or video recording facilities, except to the extent that such facilities may not be available for technical or other reasons. Each such audio or video recording shall be a public record subject to inspection pursuant to the California Public Records Act (Government Code Section 6250 et seq.), and shall not be erased or destroyed. [...]"Revenue & Taxation Code § 1611, "Request for transcript. The county board shall make a record of the hearing and, upon request, shall furnish the party with an audio recording or a transcript thereof at his or her expense. Request for an audio recording or a transcript may be made at any time, but not later than 60 days following the final determination by the county board."</p>	Admin. Code §8, §67 ; Gov. Code §6250 et seq ; Revenue & Taxation Code § 1611
8	MEETINGS	MINUTES, AAB	ASSESSMENT APPEALS BOARD (AAB)	Storage, Permanent	Permanent	3 Years	Permanent	<p>Summary of Board action(s) on agenda items, also referred to as Journal of Proceedings. Permanently retained, available online for minimum three (3) years.</p> <p>Admin. Code §67.29-2, "Each department of the City and County of San Francisco shall maintain on a World Wide Web site, or on a comparable, readily accessible location on the Internet, information that it is required to make publicly available. Each department is encouraged to make publicly available through its World Wide Web site, as much information and as many documents as possible concerning its activities. At a minimum, within six months after enactment of this provision, each department shall post on its World Wide Web site all meeting notices required under this ordinance, agendas and the minutes of all previous meetings of its policy bodies for the last three years. [...]"</p>	Revenue & Taxation Code § 1611 ; Admin. Code §8, §67

RECORDS RETENTION SCHEDULE BY TYPE – AAB
 Approved by AAB Administrator January 17, 2014

	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
9	POLICY	POLICIES AND PROCEDURES, MANDATED & GENERAL, AAB	ASSESSMENT APPEALS BOARD (AAB)	Current until superseded	Permanent Until Superseded	Permanent Until Superseded	N/A	State and local statutes, procedural guides, handbooks, training manuals and reference materials or documents originated or referenced by the AAB.	Admin. Code §8, §67
10	PUBLIC NOTICES	PUBLIC NOTICES, AAB	ASSESSMENT APPEALS BOARD (AAB)	Current	Active + 5 Years	Active + 5 Years	N/A	Annual AAB public notice posting requirement. Revenue & Taxation Code §1601(c), "In all other counties, immediately upon delivery of the roll to the auditor, the clerk shall give notice of the period during which assessment protests will be accepted, the place where they may be filed, and the time the county board will meet to equalize assessments by publication in a newspaper, if any is printed in the county, or, if none, as directed by the board of supervisors."	Revenue & Taxation Code §1601(c), Gov. Code §25105.5
11	REPORTS	REPORT, ACTIVITY REPORTS, AAB	ASSESSMENT APPEALS BOARD (AAB)	Current	Active +5 Years	Active +5 Years	N/A	Report documenting the internal activities of the AAB. Gov. Code §25105.5, "The clerk of the board of supervisors may, without complying with any other provision of law, destroy records consisting of claims against the county and claims against special districts for which the board of supervisors is the governing body, whenever the claims have been retained by the clerk for a period of not less than five years after final action on the claim. The clerk of the board of supervisors may destroy records consisting of assessment appeal applications when five years have elapsed since the final action on the application. The clerk may destroy the records three years after the final action on the application, if the records consisting of assessment appeal applications have been microfilmed, microfiched, imaged, or otherwise preserved on a medium that provides access to the documents, in accordance with Section 25105."	Admin. Code §8, Gov. Code §25105.5

RECORDS RETENTION SCHEDULE BY TYPE – AAB
 Approved by AAB Administrator January 17, 2014

12	REPORTS	REPORT, CONTROLLER (AAB)	ASSESSMENT APPEALS BOARD (AAB)	Storage, Permanent	Permanent	Active +3 Years	Permanent	Controller report of changes that need to be made on the Assessment Roll as a result of Assessment Appeals Board decisions. Initiates the process of property tax refunds. Revenue & Taxation Code §1614, "Delivery of roll to auditor. (a) The clerk of the county board shall keep an accurate record of all changes to the roll and all orders made by the county board. No later than the second Monday of each month the clerk shall deliver the statement of all changes made by the county board during the preceding calendar month to the auditor."	Gov. Code §25105.5; Revenue & Taxation Code §1614
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¹ "Current records" are records which for convenience, ready reference or other reason are retained in office space and equipment of the department involved.

"Storage records" are records which need not be retained in office space and equipment of the department involved, but which must be, or should be, prudently preserved for a time or permanently in the facilities of a records center, as specified in the following section.

"Permanent records" or essential records, are records required by law to be permanently retained. Unless otherwise required by law or regulation, permanent records shall be stored by microfilming the paper records or placing them on an optical imaging storage system, placing the original film or tape in a State-approved storage vault and delivering a copy to the department. The paper records may then be destroyed.

RECORDS RETENTION SCHEDULE BY TYPE – SOTF

Approved by SOTF December 4, 2013

RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE	
1	COMMUNICATIONS	CORRESPONDENCE, GENERAL, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current	3 Years	3 Years	N/A	<p>General SOTF correspondence not pertaining to a file. For example, informal memos to Task Force, press memos, general requests of task force members, etc.</p> <p>Admin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters."</p>	Admin. Code §8, §67
2	COMPLAINTS	COMPLAINTS FILE, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current, Permanent	Permanent	Permanent	N/A	File containing complaints filed by the public to SOTF; including those received electronically. May include responses, orders of determination, referrals, etc.	Admin. Code §8, §67
3	MEETINGS	AGENDA PACKET, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Storage, Permanent	Permanent	Active +3 Years	Permanent	Full agenda packets for SOTF, Standing Committee, and Ad Hoc meetings; includes final agenda along with supporting documentation, for permanent archival.	Admin. Code §8, §67
4	MEETINGS	AGENDA, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current	3 Years	3 Years	N/A	Draft Agendas for SOTF, Standing Committee, and Ad Hoc meetings. Also reference retention item "AGENDA PACKET, SOTF" for the full agenda packet, which is retained permanently.	Admin. Code §8, §67
5	MEETINGS	MEDIA RECORDINGS, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Storage, Permanent	Permanent	3 Years	Permanent	<p>Audio recordings of proceedings to Task Force Meetings.</p> <p>Pursuant to Admin. Code 67.14(c) Every City policy body, agency or department shall audio or video every noticed regular meeting, special meeting, or hearing open to the public held in a City Hall hearing room that is equipped with audio or video recording facilities, except to the extent that such facilities may not be available for technical or other reasons. Each such audio or video recording shall be a public record subject to inspection pursuant to the California Public Records Act (Government Code Section 6250 et seq.), and shall not be erased or destroyed. [...]</p>	Admin. Code §8, §67; Gov. Code §6250 et seq

RECORDS RETENTION SCHEDULE BY TYPE – SOTF

Approved by SOTF December 4, 2013

	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
6	MEETINGS	MINUTES, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Storage, Permanent	Permanent	5 Years	Permanent	Minutes for SOTF, Standing Committee, and Ad-Hoc meetings. Permanently retained, available online for minimum three (3) years. Admin. Code §67.29-2, "Each department of the City and County of San Francisco shall maintain on a World Wide Web site, or on a comparable, readily accessible location on the Internet, information that it is required to make publicly available. Each department is encouraged to make publicly available through its World Wide Web site, as much information and as many documents as possible concerning its activities. At a minimum, within six months after enactment of this provision, each department shall post on its World Wide Web site all meeting notices required under this ordinance, agendas and the minutes of all previous meetings of its policy bodies for the last three years. [...]"	Admin. Code §8, §67
7	POLICY	BY-LAWS	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Storage, Permanent	Permanent	5 Years	Permanent	Sunshine Ordinance Requirements Admin. Code §67.6, Conduct of Business; Time and Place for Meetings	Admin. Code §8, §67
8	POLICY	POLICY AND PROCEDURES, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current, Permanent (until Superseded)	Permanent Until Superseded	Permanent Until Superseded	N/A	General policies and procedures of the Sunshine Ordinance Task Force, retained until superseded. Older versions may be disposed only if not detrimental or defeat any public purpose. Admin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters."	Admin. Code §8, §67
9	REPORTS	REPORT, ANNUAL, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Storage, Permanent	Permanent	5 Years	Permanent	Sunshine Ordinance Requirement, Annual Report for the SOTF Admin. Code §67.30(c) [...] The task force shall report to the Board of Supervisors at least once annually on any practical or policy problems encountered in the administration of this chapter. The Task Force shall receive and review the annual report of the Supervisor of Public Records and may request additional reports or information as it deems necessary. [...] "Supervisor of Records" shall mean the City Attorney as defined by Admin Code § 67.20	Admin. Code §8, §67
10	REPORTS	REPORT, ADMINISTRATORS, SOTF	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current	5 Years	5 years	N/A	Monthly SOTF Administrator's report/update to the Sunshine Ordinance Task Force	Admin. Code §8, §67

RECORDS RETENTION SCHEDULE BY TYPE – SOTF

Approved by SOTF December 4, 2013

	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
11	REPORTS	REPORT, SUPERVISOR OF PUBLIC RECORDS	SUNSHINE ORDINANCE TASK FORCE (SOTF)	Current	7 Years	7 Years	N/A	<p>Sunshine Ordinance Requirement. "Supervisor of Records" shall mean the City Attorney as defined by Admin Code §67.20</p> <p>§67.21 (h) On at least an annual basis, and as otherwise requested by the Sunshine Ordinance Task Force, the supervisor of public records shall prepare a tally and report of every petition brought before it for access to records since the time of its last tally and report. The report shall at least identify for each petition the record or records sought, the custodian of those records, the ruling of the supervisor of public records, whether any ruling was overturned by a court and whether orders given to custodians of public records were followed. The report shall also summarize any court actions during that period regarding petitions the Supervisor has decided. At the request of the Sunshine Ordinance Task Force, the report shall also include copies of all rulings made by the supervisor of public records and all opinions issued.</p>	Admin. Code §8, §67

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"Permanent records" or essential records, are records required by law to be permanently retained. Unless otherwise required by law or regulation, permanent records shall be stored by microfilming the paper records or placing them on an optical imaging storage system, placing the original film or tape in a State-approved storage vault and delivering a copy to the department. The paper records may then be destroyed.

RECORDS RETENTION SCHEDULE BY TYPE – YOUTH COMMISSION

Approved by Youth Commission October 7, 2013

	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
1	ARCHIVE/ HISTORICAL	ARCHIVE, PROJECTS, YOUTH COMMISSION	YOUTH COMMISSION (YC)	Storage, Permanent	Permanent	5 Years	Permanent	Archived notes, reports, and information on past projects of significance -- for example, summary of LGBTQQ Task Force projects (1996-2000).	Admin. Code §8, §67
2	GENERAL INFORMATION	GENERAL PUBLIC INFORMATION, YOUTH COMMISSION	YOUTH COMMISSION (YC)	Current until superseded	Until Superseded	Until Superseded	N/A	General information for the public regarding the Youth Commission. Includes brochures, notices, front desk information, etc. Admin. Code §8.3 "Current records and storage records less than five years old may be destroyed or otherwise disposed of if their destruction or other disposition within a shorter length of time will not be detrimental to the City and County or defeat any public purpose and if a definitive description of such records and the retention period applicable to them are set forth in a schedule for the systematic retention and destruction of records that is prepared by the department head, approved by the Mayor or the Mayor's designee, or the board or commission concerned, and approved by the City Attorney as to records of legal significance, by the Controller as to records relating to financial matters, by the Retirement Board as to time rolls, time cards, payroll checks and related matters."	Admin. Code §8, §67
3	LEGISLATIVE	BY-LAWS, YOUTH COMMISSION	YOUTH COMMISSION (YC)	Current, Permanent	Permanent	Permanent	N/A	To aid in the orderly conduct of business, the Commission has the authority to create, amend, and repeal its own code of bylaws. Admin. Code §67.6, Conduct of Business; Time and Place for Meetings	Admin. Code §8, §67
4	LEGISLATIVE	RESOLUTIONS, YOUTH COMMISSION	YOUTH COMMISSION (YC)	Current, Permanent	Permanent	Permanent	N/A	Formal statement of decisions adopted by the Youth Commission	Admin. Code §8, §67
5	MEETINGS	AGENDA PACKET, YOUTH COMMISSION	YOUTH COMMISSION (YC)	Storage, Permanent	Permanent	3 Years	Permanent	Full agenda packet containing all items that have been assigned to full Commission and Committees. Includes final agenda along with supporting documentation, for permanent archival.	Admin. Code §8, §67
6	MEETINGS	AGENDA, YOUTH COMMISSION	YOUTH COMMISSION (YC)	Current	3 Years	3 Years	N/A	Draft agenda of notices of special and cancelled meetings for full Commission and Committees. Essential to the planning of Commission projects. Also reference retention item "AGENDA PACKET, YOUTH COMMISSION" for the full final agenda packet, which is retained permanently.	Admin. Code §8, §67
7	MEETINGS	EVENT CALENDARS, YOUTH COMMISSION	YOUTH COMMISSION (YC)	Current	5 Years	5 Years	N/A	Schedule of monthly Youth Commission activities/events.	Admin. Code §8, §67
8	MEETINGS	MEDIA RECORDINGS, YOUTH COMMISSION	YOUTH COMMISSION (YC)	Storage, Permanent	Permanent	1 Year	Permanent	Audio recordings of full Commission meetings as required by the Sunshine Ordinance. Admin. Code 67.14(c) Every City policy body, agency or department shall audio or video every noticed regular meeting, special meeting, or hearing open to the public held in a City Hall hearing room that is equipped with audio or video recording facilities, except to the extent that such facilities may not be available for technical or other reasons. Each such audio or video recording shall be a public record subject to inspection pursuant to the California Public Records Act (Government Code Section 6250 et seq.), and shall not be erased or destroyed. [...]	Admin. Code §8, §67; Gov. Code §6250 et seq

RECORDS RETENTION SCHEDULE BY TYPE – YOUTH COMMISSION

Approved by Youth Commission October 7, 2013

	RECORD TYPE	TITLE	DIVISION	RETENTION CATEGORY ¹	TOTAL RETENTION PERIOD	ON-SITE RETENTION	OFF-SITE STORAGE RETENTION	DESCRIPTION	REFERENCE
9	MEETINGS	MINUTES, YOUTH COMMISSION	YOUTH COMMISSION (YC)	Storage, Permanent	Permanent	5 Years	Permanent	Minutes and notes essential to the planning of full Commission projects. Permanently retained, available online for minimum three (3) years. Admin. Code §67.29-2, "Each department of the City and County of San Francisco shall maintain on a World Wide Web site, or on a comparable, readily accessible location on the Internet, information that it is required to make publicly available. Each department is encouraged to make publicly available through its World Wide Web site, as much information and as many documents as possible concerning its activities. At a minimum, within six months after enactment of this provision, each department shall post on its World Wide Web site all meeting notices required under this ordinance, agendas and the minutes of all previous meetings of its policy bodies for the last three years. [...]"	Admin. Code §8, §67
10	REPORTS	REPORT, ANNUAL SUMMARY OF ACHIEVEMENTS & PRIORITIES, YOUTH COMMISSION	YOUTH COMMISSION (YC)	Current, Permanent	Permanent	Permanent	N/A	Youth Commission's Annual Report and/or Policy and Budget Priorities, which highlights the Commission's priorities and work for the year	Admin. Code §8, §67

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