

**CITY OF TEMECULA
AGENDA REPORT**

TO: City Manager/City Council

FROM: Randi Johl, Director of Legislative Affairs/City Clerk

DATE: January 9, 2024

SUBJECT: Approve Annual Citywide Records Retention Schedule and Records Destruction for the 2024 Calendar Year

PREPARED BY: Randi Johl, Director of Legislative Affairs/City Clerk

RECOMMENDATION: That the City Council adopt a resolution entitled:

RESOLUTION NO.

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF
TEMECULA APPROVING REVISIONS TO THE
ESTABLISHED CITYWIDE RECORDS RETENTION
SCHEDULE, THEREBY AMENDING AND RESTATING THE
RECORDS RETENTION POLICY, AND APPROVING THE
DESTRUCTION OF CERTAIN RECORDS

BACKGROUND: The citywide Records Management Program (“Program”) is based on state and federal laws and agency guidelines governing public records. The Records Retention Schedule (“Schedule”) is a key element of this program. The objective of the program and schedule is to administer and preserve records vital to the operation of the City and to lawfully dispose of records that have served their usefulness. Program components include the retention schedule, records destruction, technology storage and retrieval, and related policies and procedures. The schedule is a comprehensive listing of records created or maintained by the City, that includes the length of time each record is retained and the legal retention authority. The Electronic Document Management System (“EDMS”) is a part of the overall program. The City uses Laserfiche as its EDMS to store its official records electronically. The purpose of the EDMS policy is to ensure the City’s EDMS meets the definition of a Trusted System as set forth in Government Code Sections 12168.7 and 34090.5 and is in compliance with regulations developed by the Secretary of State to use in recording, storing, and reproducing permanent and nonpermanent documents or records in electronic media, so that every reproduction of a record from the EDMS will be deemed to be a copy of an original record.

Documents already imaged and identified within various records series of the schedule are destroyed in accordance with policy. Permanent imaging of these records complies with the requirements of state and federal laws. Proposed revisions to the schedule are based upon an annual survey of departments. Revisions reflect changes in records ownership, operational needs and

changes in applicable records management law.

Government Code Section 34090 requires legislative approval for said destruction, along with City Attorney review and Department Director authorization. The City Attorney consents to the destruction of the proposed records by way of approval of this report and attachments and signature on the corresponding resolution. Assuming the City Council approves the proposed destruction, Department Directors will also sign off on the request for destruction of records prior to actual destruction. In addition to the descriptions set forth in Exhibit A, bar code records also identify each record retained and/or destroyed by the City.

Therefore, staff recommends that the City Council approve the annual retention schedule and records destruction.

FISCAL IMPACT: The costs associated with the program are contained in the annual operating budget for the City Clerk Department.

ATTACHMENTS:

1. Resolution
2. Exhibit A – Records Retention Schedule