



**OFFICE OF THE
CITY CLERK**

**CITY OF SACRAMENTO
CALIFORNIA**

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May 17, 2004

www.cityofsacramento.org

City Council
Sacramento, California

Honorable Members in Session:

SUBJECT: CITY OF SACRAMENTO RECORDS RETENTION SCHEDULES

LOCATION AND COUNCIL DISTRICT: All.

RECOMMENDATION: Adopt resolution establishing a City Records Retention Schedule and authorizing destruction of certain city records

CONTACT PERSON: Shirley Concolino, City Clerk, 808-5442

FOR MEETING OF: May 25, 2004

SUMMARY:

The City has developed a robust records management program, including developing Records Retention Schedules for each department, and citywide policies and procedures to manage and destroy unnecessary records. The adoption of these retention schedules will result in efficient gains and cost savings. A copy of the citywide retention and destruction schedule is on file in the City Clerk's office and is available upon request.

BACKGROUND:

In August of 2002, Sacramento selected Gladwell Governmental Services, Inc., an expert in local government records, to develop a comprehensive retention schedule for the city, prepare records management procedures and conduct employee training. An upgrade in the existing, more informal program was necessary to reduce current and future records storage costs, eliminate duplication of effort, increase efficiency and take advantage of current technology and changes in law.

The need for a well-defined records management program is driven by many factors, including:

- Very limited spaces in most offices
- Many departments are filing and storing copies of the same records
- Sacramento produces and manages many permanent records
- Lack of storage space
- Technology advancements, including document imaging
- Changes in law, including the adoption of statewide retention guidelines.

The purpose of a records management program is to apply efficient and economical methods to the creation, utilization, maintenance, retention, preservation and disposal of all City records.

The retention schedules were written interactively with each department participating. They provide clear, specific records descriptions and retention periods, and apply current law and technology to the management of Sacramento's records. By identifying which department is responsible for maintaining the original records, and by establishing clear retention periods for different categories of records, Sacramento has already realized significant savings in labor cost storage costs, freeing filing cabinet and office space, and realized operational efficiencies. These efficiency gains will increase once the retention schedules are adopted by the City Council.

While the Records Retention Schedule is detailed and somewhat complex, the appropriate administrative and support staff have been well trained and are familiar with its application.

The President of the firm, Diane R. Gladwell, has also facilitated the City's development of a "Records Management Manual" which is a detailed manual covering public records, records inventory, retention schedules, equipment and storage, filing procedures, records disposal, disaster recovery planning procedures, electronic records, and document imaging. Employees from all departments have received training on these policies and procedures.

The appropriate Department Head, the City Clerk and the City Attorney have reviewed and approved the Records Retention Schedules.

FINANCIAL CONSIDERATIONS: None.

ENVIRONMENTAL CONSIDERATIONS: None.

POLICY CONSIDERATIONS:

Adoption of the proposed resolution will establish the City's Records Retention Schedule and will provide for the efficient records management and the future disposal of records upon the request of the department and the written approval of the Department or Division Head and the City Attorney.

ESBD CONSIDERATIONS: Not Applicable.

Respectfully Submitted:



Shirley Concolino, City Clerk

Attachments:

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A copy of the Records Retention Schedule is on file in the City Clerks office for review and is available upon request

RESOLUTION NO.

ADOPTED BY THE SACRAMENTO CITY COUNCIL

ON DATE OF _____

RESOLUTION ADOPTING A RECORDS RETENTION SCHEDULE AND AUTHORIZING DESTRUCTION OF CERTAIN CITY RECORDS

WHEREAS, the maintenance of numerous records is expensive, slows document retrieval, and is not necessary after a certain period of time for the effective and efficient operation of the government of the City of Sacramento; and

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

WHEREAS, the State of California has adopted guidelines for retention period for various government records;

NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF SACRAMENTO DOES RESOLVE AS FOLLOWS:

Section 1. The records of the City of Sacramento, as set forth in the Records Retention Schedule, on file in the Office of the City Clerk, are hereby authorized to be destroyed as provided by Section 34090 et seq. of the Government Code of the State of California and in accordance with the provision of said schedule upon the request of the Department Head and with the consent in writing of the City Attorney, without further action by the City Council of the City of Sacramento.

Section 2. The term "records" as used herein shall include documents, instructions, books, microforms, electronic files, magnetic tape, optical media, or papers; as defined by the California Public Records Act.

Section 3. The City Clerk shall certify to the passage and adoption of this resolution and enter it into the book of original resolutions.

Section 4. This resolution shall become effective immediately upon its passage and adoption.

FOR CITY CLERK USE ONLY

RESOLUTION NO. _____

DATE ADOPTED: _____

MAYOR

ATTEST:

City Clerk

FOR CITY CLERK USE ONLY

RESOLUTION NO.: _____

DATE ADOPTED: _____