

(R-94-1787)

RESOLUTION NUMBER R- 284697

ADOPTED ON OCT 03 1994

BE IT RESOLVED, by the Council of The City of San Diego,
that the Records Disposition Schedule for records maintained by
City Council District 5 attached as Exhibit A is hereby adopted.

APPROVED: JOHN W. WITT, City Attorney

By Cristie C. McGuire
Cristie C. McGuire
Deputy City Attorney

CCM:jrl
05/12/94
Or.Dept:Clerk
R-94-1787
Form=r-t

RECORDS DISPOSITION SCHEDULE

CC-1871 (6-02)

ITEM NO. (*)	TITLE AND DESCRIPTION OF RECORD SERIES (*)	RETENTION			REMARKS (**)	SCHED. NO. (1)	DATE (1)
		DEPT. (1)	R.C. (1)	TOTAL (1)			
1.	<p>PERSONNEL FILES - INDIVIDUAL. Contains records for current and past employees of the department. Records are divided into two groups.</p> <p>Group A records include: <u>Accident reports, counseling documentation, disciplinary action records (including sealed disciplinary action maintained by a department head), education and training records, Emergency Notification Information Forms, employee recognition awards (e.g., exceptional merit increases, discretionary leave, bonus pay), employment application and resume (if copies available), industrial injury reports and records, letters of commendation or appreciation, medical data pertinent to the new job, name change records, out-of-class assignment records, payroll deduction forms, all performance evaluation and supplemental performance reports completed within the past year (or the last such report if older than one year), Vehicle Collision Review and Prevention Program Certification Form, and waivers or extensions of probationary period (if pertinent to the new job).</u></p>					1	1

RECORDS DISPOSITION SCHEDULE

CG-1571 (6-82)

DEPARTMENT (1)	CITY COUNCIL DISTRICT 5	SCHED. NO. (2)	1	DATE (1)	
DIVISION		PAGE (1)	2		

ITEM NO. (3)	TITLE AND DESCRIPTION OF RECORD SERIES (4)	RETENTION			REMARKS (10)
		DEPT. (2)	R.C. (1)	TOTAL (1)	
	<p>Group B records include: Appointing authority selection interview documentation (to be maintained in separate files, not in an employee's personnel file), discharge and employee separation records, job descriptions, leave requests, letters of complaint against the employee, long term disability records, medical data not pertinent to the new job, memoranda and/or correspondence regarding grievances, payroll-related records (e.g., Merit Increase Notices, Payroll Change Notices, Notices of Absence or Overtime, Time Sheets Correction Notices, shift differential pay, bilingual pay, standby pay, etc.), performance evaluation reports (other than those in Group A), promotion, demotion and transfer records; reclassification and/or salary adjustment records, Requests for Certification and Personnel Certifications, retirement records, waivers and/or extensions of probationary periods (if not pertinent to the new job).</p>				<p>For both Group A and Group B records please note for transferring/terminating employees. When an employee leaves a department the losing department should review its personnel records to determine if there are any records that should be forwarded to the Personnel Department which were not sent.</p>

2-284697

RECORDS DISPOSITION SCHEDULE

CC-1871 (6-82)

DEPARTMENT (1)	CITY COUNCIL, DISTRICT 5	SCHED. NO. (1)	1	DATE (1)	
DIVISION		PAGE (1)	3		

ITEM NO. (1)	TITLE AND DESCRIPTION OF RECORD SERIES (1)	RETENTION			REMARKS (1)
		DEPT. (1)	R.C. (1)	TOTAL (1)	
a.	Current employees (Group A and B records)	Retain records in office.	-	-	
b.	Transferring employees (Group A records). (Note: "Transferring employees" refers to employees changing departments to inter-departmental transfers, class transfers, promotions, demotions, and/or failures of probation).	Transfer with employee to receiving department.	-	-	
c.	Transferring employees (Group B records)	Losing department destroys records 3 years after employee transfers.	-	Destroy records 3 years after transfer.	
d.	Terminated employees (Group A and B records)	Destroy 3 years after employee has terminated.	-	Termination + 3 years.	

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RECORDS DISPOSITION SCHEDULE

CC-1871 (6-82)

DEPARTMENT (1)	CITY COUNCIL DISTRICT 5	SCHED. NO. (1)	1	DATE (1)	
DIVISION		PAGE (1)	4		

ITEM NO. (1)	TITLE AND DESCRIPTION OF RECORD SERIES (1)	RETENTION			REMARKS (10)
		DEPT. (2)	R.C. (3)	TOTAL (4)	
2.	ADMINISTRATIVE POLICY FILES. Documents reflecting the position of the Councilmember on City policies and/or the role of the Councilmember in the development of City policy. Files include memoranda, reports, correspondence, resolutions, ordinances, and 1472's. Outgoing correspondence and memoranda arranged chronologically, other materials arranged by subject.	2	P	P	
3.	ADMINISTRATIVE WORKING FILES - ROUTINE. Documents relating to various subjects of longer term interest which require the attention of the Council office on a recurring basis. Files include reports, memoranda, correspondence, news-paper articles, resolutions, ordinances and notes. Arranged chronologically by subject.	2	3	5	

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RECORDS DISPOSITION SCHEDULE

CC-1571 (6-82)

DEPARTMENT (1)	CITY COUNCIL, DISTRICT 5	SCHED. NO. (1)	1	DATE (1)	
DIVISION		PAGE (1)	5		

EM NO. (1)	TITLE AND DESCRIPTION OF RECORD SERIES (1)	RETENTION			REMARKS (1)
		DEPT. (1)	R.C. (1)	TOTAL (1)	

ADMINISTRATIVE WORKING FILES
 - TRANSITORY. Documents relating to various subjects covering a wide variety of City issues which require Council attention on a short-term basis. Files include reports, memoranda, correspondence, newspaper articles, resolutions. Arranged chronologically by subject.

- a. Original
- b. Duplicate

2
 Destroy when reference value ceases.

2
 Destroy when reference value ceases.

5. APPOINTMENT CALENDARS. Schedules for appointments, meetings and other miscellaneous notations for the Councilmember. Arranged chronologically.

2 P P

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RECORDS DISPOSITION SCHEDULE

CC-1871 (6-82)

DEPARTMENT (1)	CITY COUNCIL DISTRICT 5	SCHED. NO. (1)	DATE (1)
DIVISION		1	PAGE (1) 6

EM NO. (1)	TITLE AND DESCRIPTION OF RECORD SERIES (1)	RETENTION			REMARKS (1)
		DEPT. (1)	R.C. (1)	TOTAL (1)	

5. CORRESPONDENCE - ROUTINE. Letters from constituents requesting information, recommending positions on various issues, complaining about certain problems, thanking the Councilmember for a particular position on certain issues, or congratulating the Councilmember for his or her achievements. Arranged chronologically or alphabetically by the name of the constituent.

7. COUNCIL DISTRICT ISSUES FILES. Documents relating to community organizations found in the Council district or relating to special problems found in the Councilmember's district. These files reflect the relationship of the Councilmember to his or her district and their activities in regard to district issues. Arranged by community organization or alphabetically by subject.

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RECORDS DISPOSITION SCHEDULE

CC-1871 (0-82)

DEPARTMENT (1)	CITY COUNCIL, DISTRICT 5		SCHED. NO. (1)	DATE (1)
DIVISION			1	PAGE (1) 7

ITEM NO. (1)	TITLE AND DESCRIPTION OF RECORD SERIES (1)	RETENTION			REMARKS (10)
		DEPT. (1)	R.C. (1)	TOTAL (1)	

INVITATIONS. Requests extended to the Councilmember to attend various functions of different community organizations. Arranged chronologically or by category of accepted or declined, chronologically thereunder.

- a. Nonrecord

LEGISLATIVE MEETING FILES. Records which document legislative meetings involving the Council or the Councilmember. Meeting records include dockets, agendas, and/or backup materials for agenda items for the City Council meetings, City Council Committee meetings, and/or outside agency meetings such as the San Diego Association of Governments or the Metropolitan Transit Development Board. Arranged by type of meeting, chronologically thereunder.

- a. Duplicate

Destroy when no longer needed.

Destroy when no longer needed.

Destroy when reference value ceases.

Destroy when reference value ceases.

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RECORDS DISPOSITION SCHEDULE

CC-1571 (6-82)

DEPARTMENT (1)	CITY COUNCIL DISTRICT 5	SCHED. NO. (1)	DATE (1)
DIVISION		1	PAGE (1)
			8

EM. NO. (1)	TITLE AND DESCRIPTION OF RECORD SERIES (1)	RETENTION			REMARKS (10)
		DEPT. (1)	R.C. (1)	TOTAL (1)	

NEWSPAPER CLIPPINGS. Newspaper articles about the Councilmember, the Councilmember's district, or various City issues of interest. Arranged chronologically or by subject.

a. Nonrecord

NEWS RELEASES. Statements of the Councilmember's position on one or more issues which may call for (a) specific action(s) by the City on the issue or issues raised in the News Release. News Releases reflect the Councilmember's position on policy issues and they may document the Councilmember's role in the development of City policy. Arranged chronologically.

Destroy when reference value ceases.

2

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RECORDS DISPOSITION SCHEDULE

CC-1571 (0-82)

DEPARTMENT (1)	CITY COUNCIL DISTRICT 5	SCHED. NO. (1)	1	DATE (1)	
DIVISION		PAGE (1)	9		

ITEM NO. (1)	TITLE AND DESCRIPTION OF RECORD SERIES (1)	RETENTION			REMARKS (1)
		DEPT. (1)	R.C. (1)	TOTAL (1)	

OFFICE MANAGEMENT FILES. Records which document the day-to-day administration of the office. Files include travel vouchers, travel expenditure receipts, various invoices, Printing Services Requisitions (PEA-1469), Telephone Service Authorizations (GS-240), Travel Expense Reports (FM-1312), and Direct Payments (AC-468). Complete records of non-personnel expenditures are maintained by Council Administration. Arranged chronologically or unarranged.

a. Duplicate

Destroy when reference value ceases.

Destroy when reference value ceases.

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RECORDS DISPOSITION SCHEDULE

CC-1571 (6-82)

EM. NO. (1)	TITLE AND DESCRIPTION OF RECORD SERIES (1)	RETENTION			REMARKS (10)
		DEPT. (2)	R.C. (1)	TOTAL (6)	
3.	ROUTE SLIPS. Complaints to the Council Offices about City operations and/or policies (Form CM-8). These complaints are documented on the Route Slips and forwarded to City staff for investigation and response. Documents in this file may include logs or indexes of route slips received. Arranged chronologically; alphabetically by the name of the constituent; chronologically and alphabetically by the name of the constituent thereunder; or alphabetically by subject, alphabetically by name of the constituent thereunder.	1*	3	4	*It is not required. that these files be transferred to the Records Center at the end of one year; however, total retention in both the office and the Records Center should not exceed four years.
4.	SPEECHES. Talks made to various groups in the City by the Council-member on a variety of topics. Speeches may be an important indicator of the policy positions of the Councilmember on a number of important City issues. Arranged chronologically.	2	P	P	

DEPARTMENT (1)	CITY COUNCIL DISTRICT 5		SCHED. NO. (2)	DATE (1)
DIVISION			1	PAGE (4)
				10

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RECORDS DISPOSITION SCHEDULE

CC-1571 (6-82)

EM NO. (1)	TITLE AND DESCRIPTION OF RECORD SERIES (1)	RETENTION			REMARKS (10)
		DEPT. (2)	R.C. (3)	TOTAL (4)	
5.	STATEMENTS OF ECONOMIC INTEREST. Files yearly with the City Clerk (Form 721) who forwards them to the State Fair Political Practices Commission. The Statements report the Councilmember's financial holdings and investments. Arranged chronologically by year. a. Duplicate				Original maintained by the State Fair Political Practices Commission. The City Clerk maintains copies for term of office plus four years.
6.	TECHNICAL REFERENCE MATERIALS. Various publications from the City and elsewhere which are used for reference purposes. Contents include the Municipal Code, City budget, Council Policy Manual, Administrative Regulations, Personnel Manual, City Charter, textbooks, and various journals and publications. Unarranged. a. Duplicate				

DEPARTMENT (1) CITY COUNCIL DISTRICT 5
DIVISION

SCHED. NO. (1) 1
DATE (1)
PAGE (4) 11

Destroy when reference value ceases.

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RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			
CITY COUNCIL DISTRICT 5	PERSONNEL FILES - INDIVIDUAL			
COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	CURRENT EMPLOYEES	Retain all records in office.		
	TRANSFERRING EMPLOYEES	See * below.		
	TERMINATED EMPLOYEES	Destroy all records three (3) years after employee terminates.		

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

PERSONNEL FILES - INDIVIDUAL contains records for current and past employees of the department

Group A records include: Accident reports, counseling documentation, disciplinary action records (including sealed disciplinary action records maintained by a department head), education and training records, Emergency Notification Information Forms, employee recognition awards (e.g., exceptional merit increases, discretionary leave, bonus pay), employment application and resume (if copies available), industrial injury reports and records, letters of commendation or appreciation, medical data pertinent to the new job, name change records, out-of-class assignment records, payroll deduction forms, all performance evaluation and supplemental performance reports completed within the past year (or the last such report if older than one year), Vehicle Collision Review and Prevention Program Certification Form, and waivers or extensions of probationary period (if pertinent to the new job).

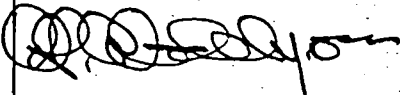
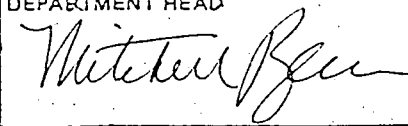
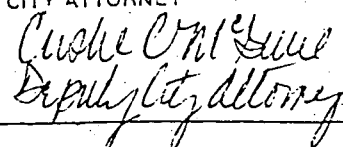
Group B records include: Appointing authority selection interview documentation (to be maintained in separate files, not in an employee's personnel file), discharge and employee separation records, job descriptions, leave requests, letters of complaint against the employee, long term disability records, medical data not pertinent to the new job, memoranda and/or correspondence regarding grievances, payroll-related records (e.g., Merit Increase Notices, Payroll Change Notices, Notices of Absence or Overtime, Time Sheet Correction Notices, shift differential pay, bilingual pay, standby pay, etc.), performance evaluation reports (other than those in Group A), promotion, demotion and transfer records; reclassification and/or salary adjustment records, Requests for Certification and Personnel Certifications, retirement records, waivers and/or extensions of probationary periods (if not pertinent to the new job).

*Disposition for Transferring employees (includes employees changing departments due to interdepartmental transfers, class transfers, promotions, demotions and/or failures of probation):

- Transfer Group A records to receiving department.
- Losing department destroys Group B records three (3) years after employee transfers.

NOTE: For both Group A and Group B records please note for transferring/terminating employees. When an employee leaves a department the losing department should review its personnel records to determine if there are any records that should be forwarded to the Personnel Department which were not sent originally.

Retention Criteria: Minimum legal requirement established by Government Code section 34090(d)

APPROVED BY:		
CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
		

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

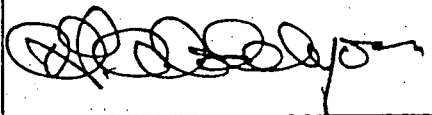
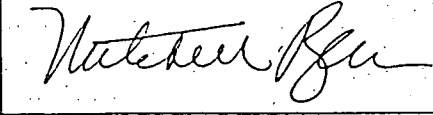
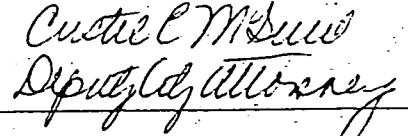
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5		RECORDS SERIES TITLE ADMINISTRATIVE POLICY FILES		
COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	P	P

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Administrative Policy Files consist of documents which reflect the position of the Councilmember on City policies and/or reflect the role of the Councilmember in the development of City policy. Files include outgoing correspondence and memoranda, documents relating to legislation initiated by the Councilmember, and documents on issues in which the Councilmember was actively involved in the development of City policy. Contents of these files include memoranda, reports, correspondence, resolutions, ordinances, and 1472's.

Outgoing correspondence and memoranda arranged chronologically, other materials arranged by subject.

Retention Criteria: Minimum legal requirement established by Government Code section 34090(d); decision to maintain permanently to meet the historical needs of the City.

APPROVED BY:		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY 

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

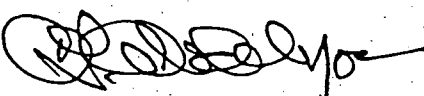
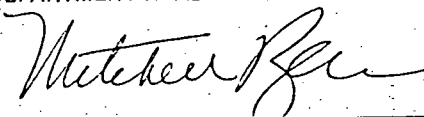
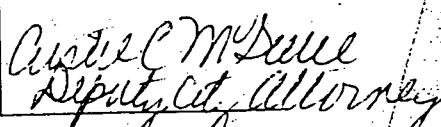
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5		RECORDS SERIES TITLE ADMINISTRATIVE WORKING FILES - ROUTINE		
COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	3	5

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Routine Administrative Working Files consist of documents relating to various subjects of longer term interest which require the attention of the Council office on a recurring basis. These subjects cover a wide variety of City issues. Files are used for research and reference. File contents include reports, memoranda, correspondence, newspaper articles, resolutions, ordinances, and notes.

Arranged chronologically by subject.

Retention Criteria: Minimum legal requirement established by Government Code section 34090(d).

APPROVED BY: CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
		

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

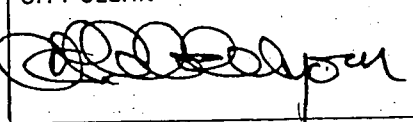
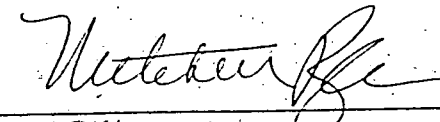
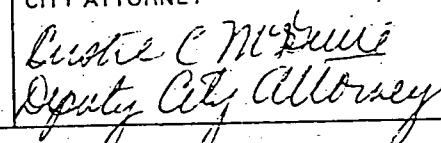
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5		RECORDS SERIES TITLE ADMINISTRATIVE WORKING FILES - TRANSITORY		
COPIES BY DEPT./SECTION:	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	-	2
	DUPLICATE	Destroy when reference value ceases.		

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Transitory Administrative Working Files consist of documents relating to various subjects of passing interest to the Council office. These subjects cover a wide variety of City issues which require Council attention on a short-term basis. Files are used for reference and research. File contents include reports, memoranda, correspondence, newspaper articles, resolutions.

Arranged chronologically by subject.

Retention Criteria: For originals, minimum legal requirement established by Government Code section 34090(d); for duplicates, Government Code section 34090.7.

APPROVED BY: CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY  Lester C. McNamee Deputy City Attorney
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RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

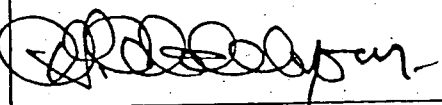
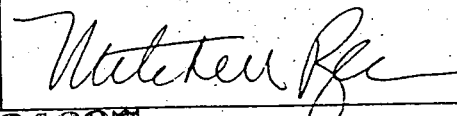
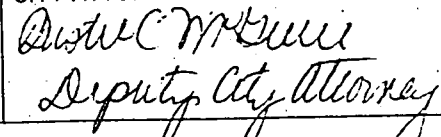
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5	RECORDS SERIES TITLE APPOINTMENT CALENDARS			
COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	P	P

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Appointment Calendars are schedules for appointments, meetings, and other miscellaneous notations for the Councilmember.

Arranged chronologically.

Retention Criteria: Minimum legal requirement established by Government Code section 34090(d); decision to maintain permanently to meet the historical needs of the City.

APPROVED BY: CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
		

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

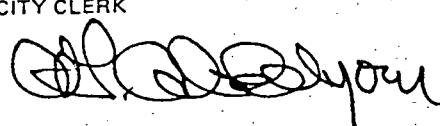
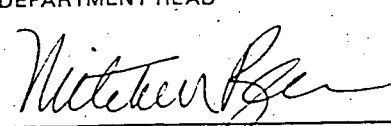
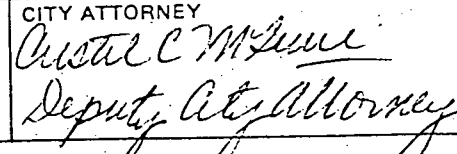
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5	RECORDS SERIES TITLE CORRESPONDENCE - ROUTINE			
COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	-	2

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Routine Correspondence consists of letters from constituents requesting information, recommending positions on various issues, complaining about certain problems, thanking the Councilmember for a particular position on certain issues, or congratulating the Councilmember for his or her achievements.

Arranged chronologically or alphabetically by the name of the constituent.

Retention Criteria: Minimum legal requirement established by Government Code section 34090 (d).

APPROVED BY: CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
		

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

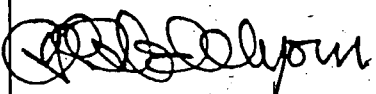
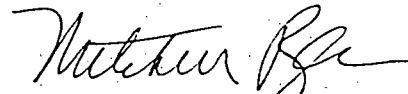
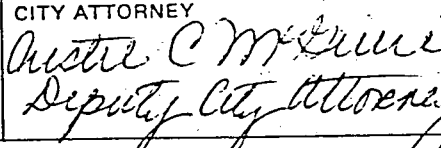
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5	RECORDS SERIES TITLE COUNCIL DISTRICT ISSUES FILES			
COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	P	P

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Council District Issues Files consist of documents relating to community organizations found in the Council district or relating to special problems found in the Councilmember's district. These files reflect the relationship of the Councilmember to his or her district and reflect the Councilmember's activities in regard to district issues.

Arranged by community organization or alphabetically by subject.

Retention Criteria: Minimum legal requirement established by Government Code section 34090(d); decision to maintain permanently to meet the historical needs of the City.

APPROVED BY: CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
		 Austin C. McQuinn Deputy City Attorney

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

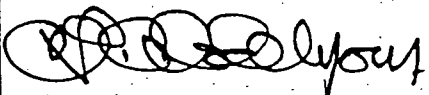
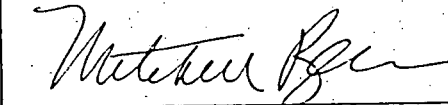
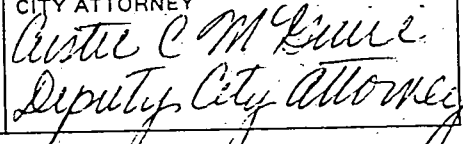
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5	RECORDS SERIES TITLE INVITATIONS			
COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	NONRECORD	Destroy when no longer needed.		

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Invitations are requests extended to the Councilmember to attend various functions of different community organizations.

Arranged chronologically or by category of accepted or declined, chronologically thereunder.

Retention Criteria: San Diego Municipal Code, Article 2, Division 26.

APPROVED BY: CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY  Austin C. M. Kline Deputy City Attorney
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RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

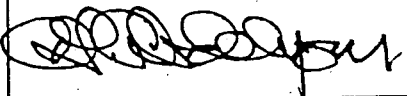
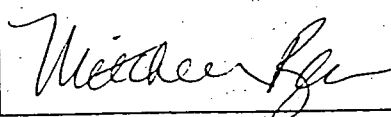
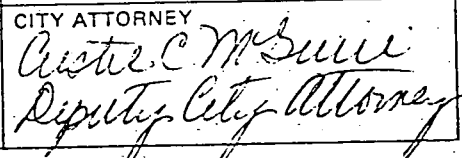
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5	RECORDS SERIES TITLE LEGISLATIVE MEETING FILES			
COPIES BY DEPT./SECTION:	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	DUPLICATE	Destroy when reference value ceases.		

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Legislative Meeting Files consist of the records which document legislative meetings involving the Council or the Councilmember. Meeting records include dockets, agendas, and/or backup materials for agenda items for the City Council meetings, City Council Committee meetings, and/or outside agency meetings such as the San Diego Association of Governments or the Metropolitan Transit Development Board.

Arranged by type of meeting, chronologically thereunder.

Retention Criteria: Government Code section 34090.7.

APPROVED BY: CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
		

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

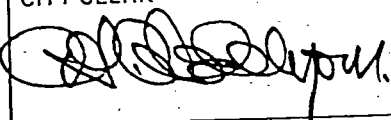
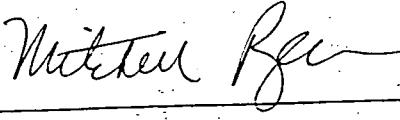
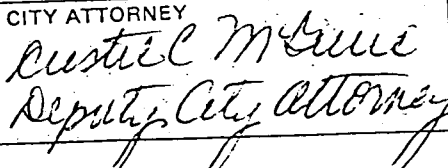
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5		RECORDS SERIES TITLE NEWSPAPER CLIPPINGS		
COPIES BY DEPT./SECTION :	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	NONRECORD	Destroy	when reference	
		value ceases.		

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Newspaper Clippings are newspaper articles about the Councilmember, the Councilmember's district, or various City issues of interest.

Arranged chronologically or by subject.

Retention Criteria: San Diego Municipal Code, Article 2, Division 26.

APPROVED BY: CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY 
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RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

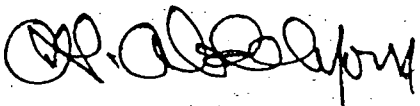

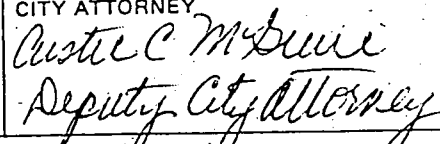
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5	RECORDS SERIES TITLE NEWS RELEASES			
COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	P	P

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

News Releases are statements of the Councilmember's position on one or more issues and they may call for (a) specific action(s) by the City on the issue or issues raised in the News Release. News Releases are an important record of the Councilmember's position on policy issues and they may reflect the Councilmember's role in the development of City policy.

Arranged chronologically.

Retention Criteria: Minimum legal requirement established by Government Code section 34090(d); decision to maintain permanently to meet the historical needs of the City.

APPROVED BY: CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
		

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

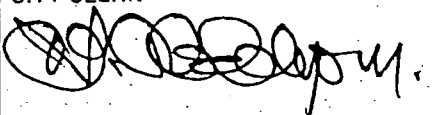
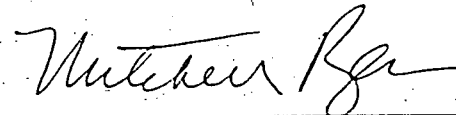
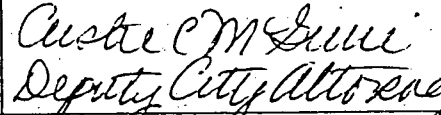
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5		RECORDS SERIES TITLE OFFICE MANAGEMENT FILES		
COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	DUPLICATE	Destroy	when reference	
		value ceases.		

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Office Management Files consist of records which document the day-to-day administration of the office. Files include travel vouchers, travel expenditure receipts, various invoices, Printing Services Requisitions (PEA-1469), Telephone Service Authorizations (GS-240), Travel Expense Reports (FM-1312), and Direct Payments (AC-468). Complete records of non-personnel expenditures are maintained by Council Administration.

Arranged chronologically or unarranged.

Retention Criteria: Government Code section 34090.7.

APPROVED BY:		
CITY CLERK 	DEPARTMENT HEAD 	CITY ATTORNEY 

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			
	COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD	
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	PERSONNEL FILES - INDIVIDUAL			
CITY COUNCIL DISTRICT 5	CURRENT EMPLOYEES	Retain all records in office.		
	TRANSFERRING EMPLOYEES	See * below.		
	TERMINATED EMPLOYEES	Destroy all records two (2) years after employee terminate.		

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

PERSONNEL FILES - INDIVIDUAL contains records for current and past employees of the department. Records are divided into two groups:

Group A records include: Accident reports, counseling documentation, disciplinary action records, education and training records, Emergency Notification Information Forms, employee recognition awards (e.g. exceptional merit increases, discretionary leave, bonus pay), employment application and resume (if copies available), injury reports and records, letters of commendation or appreciation, medical data pertinent to the new job, name change records, payroll deduction forms, performance evaluation report or supplemental performance report (latest copy only), Vehicle Collision Review and Prevention Program Certification Form, and waivers or extensions of probationary period (if pertinent to the new job).

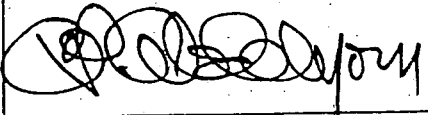
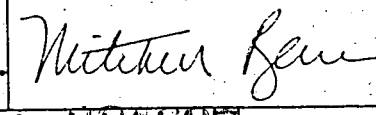
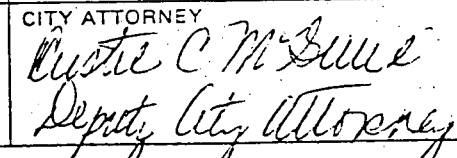
Group B records include: Appointing authority selection interview documentation, discharge and employee separation records, job descriptions, leave requests, letters of complaint against the employee, long term disability records, medical data not pertinent to the new job, memoranda and/or correspondence regarding grievances, payroll-related records (e.g. Merit Increase Notices, Payroll Change Notices, Notices of Absence or Overtime, Time Sheet Correction Notices, shift differential pay, bi-lingual pay, standby pay, etc.), performance evaluation reports.

*Disposition for Transferring employees (includes employees changing department due to interdepartmental transfers, class transfers, promotions, and/or demotions):

- a. Transfer Group A records to receiving department.
- b. Losing department destroys Group B records two (2) years after employee transfer

NOTE: When an employee leaves a department either through transfer or termination, the losing department should review its personnel records to determine if there are any records which were not sent originally to Personnel Department and should be forwarded.

Retention Criteria: Minimum legal requirement established by Government Code Section 34090(d).

APPROVED BY: CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
		

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5	RECORDS SERIES TITLE ROUTE SLIPS			
COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	1*	3	4



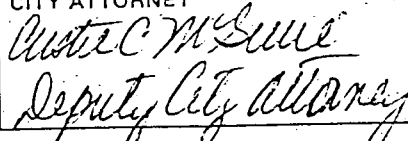
RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Route Slips (Form CM-8) are complaints from constituents to the Council Offices about City operations and/or policies. These complaints are documented on the Route Slips and forwarded to City staff for investigation and response. Documents in this file may include logs or indexes of route slips received. Route slips are also maintained by the Citizen's Assistance Department for five years.

Arranged chronologically; alphabetically by name of the constituent; chronologically and alphabetically by name of the constituent thereunder; or alphabetically by subject, alphabetically by name of the constituent thereunder.

*It is not required that these files be transferred to the Records Center at the end of one year; however, total retention in both the office and the Records Center should not exceed four years.

Retention Criteria: Minimum legal requirement established by Government Code section 34090 (d).

APPROVED BY: CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
		

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

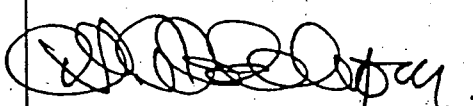
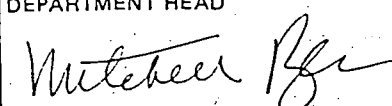
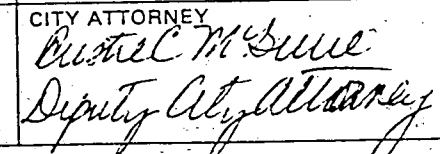
ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5	RECORDS SERIES TITLE SPEECHES			
COPIES BY DEPT./SECTION:	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	P	P

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Speeches are talks made to various groups in the City by the Councilmember on a variety of topics. Speeches may be an important indicator of the policy positions of the Councilmember on a number of important City issues.

Arranged chronologically.

Retention Criteria: Minimum legal requirement established by Government Code section 34090 (d); decision to maintain permanently to meet the historical needs of the City.

APPROVED BY: CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
		

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5		RECORDS SERIES TITLE STATEMENTS OF ECONOMIC INTEREST		
COPIES BY DEPT./SECTION:	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	DUPLICATE	Destroy	when reference	
		value ceases.		

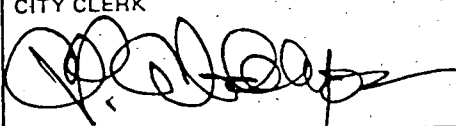
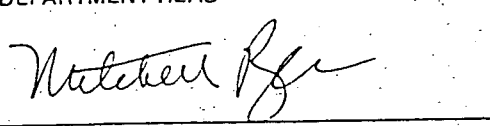
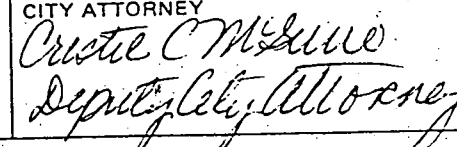
RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Statements of Economic Interest (Form 721) are filed yearly with the City Clerk. The Clerk forwards the original to the State Fair Political Practices Commission and retains a copy for the term of office of the Councilmember plus four additional years. The Statements report the Councilmember's financial holdings and investments.

Arranged chronologically by year.

Retention Criteria: Government Code section 34090.7.

R-284697

APPROVED BY: CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
		 Cristal C. McMillen Deputy City Attorney

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

ORIGINATING DEPARTMENT CITY COUNCIL DISTRICT 5	RECORDS SERIES TITLE TECHNICAL REFERENCE MATERIALS			
COPIES BY DEPT./SECTION	COPY DESIGNATION	RETENTION PERIOD		
		DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	DUPLICATE	Destroy	when reference	
		value ceases.		

RECORD SERIES DESCRIPTION (Purpose, content, and method of filing):

Technical Reference Materials consist of various publication from the City and elsewhere which are used for reference purposes. Contents include the Municipal Code, City budget, Council Policy Manual, Administrative Regulations, Personnel Manual, City Charter, text books, and various journals and publications.

Unarranged.

Retention Criteria: Government Code section 34090.7.

R-284697

APPROVED BY: CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
