(R-94-1787)

RESOLUTION NUMBER R- 284697 ADOPTED ON OCT 0 3 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

Bv

Cristie C. McGuire Deputy City Attorney

CCM:jrl 05/12/94

Or.Dept:Clerk

R-94-1787 Form=r-t

RECORDS DISPOSITION SCHEDULE

DEPARTMENT (1)

n	CC-1871 (6-02)		C.T.T.Y	COUNCIL DISTRICT 5	TRICT 5	NC.(*)	PAGE
		DIVISION	2			ш	PAGE
			RETENTION	ON		Res	REMARKS (
TEM NO.	TITLE AND DESCRIPTION OF RECORD SERIES (4)	-	DEPT. (1)	· R.C. (•)	TOTAL (1)		
1	PERSONNEL FILES - INDIVIDUAL. Contains records for current and past employees of the department.	:					•
	groups.						

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

to the new job).

	DIVISION			PAGE (4)
•.		•	<u> </u>	1

DATE Ξ

284697

RECORDS DISPOSITION SCHEDU

CC-1871 (6-82)

TEM NO.

TITLE AND DESCRIPTION OF RECORD

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

AARKS (10)	REM/	TOTAL (1)	R.C. (•)	DEPT. (1)	D SERIES (•)
PAGE (4)	Н			DIVISION	
DATE (1)	SCHED. NO.(1)	'RIC'I' 5	CIL DIST	DEPARTMENT (1) CITY COUNCIL DISTRICT 5	JLE

and Group B records should be forwarded any records that mine if there are records its personnel When an employee ating employees. please note for were not sent. Department which to the Personnel ment should review the losing departleaves a department transferring/terminboth Group A to deter-

	<u> </u>		:			
(
2846		years.		after employee has terminated.	(Group A ar	· ·
97		ermi	1	Destroy 3 years	d Terminated employees	•
•		after transfer.	•	nployee		
		Destroy records 3 years	1	Losing department destroys records 3 years after	<pre>c. Transferring employees (Group B records)</pre>	·
					failures of probation).	•
	•				l transfers, fers, pro-	
					<pre>departments to inter-</pre>	
				ment.	. = 1-3	
				40 P	`ש א	
			!		(Group A and B records)	
		ı	ı	Retain records in	t_employe	
						Ξ
REMARKS (11)		TOTAL (1)	ON H.C. (•)	RETENTION	TITLE AND DESCRIPTION OF RECORD SERIES (+)	TEM NO.
1 PAGE (4)			1 /		CC-1871 (6-82)	c
SCHED. DATE (1)		DISTRICT 5		DEPARTMENT (1) CTTY COUNCIL	RECORDS DISPOSITION SCHEDULE	RE
┨						

			ω.				2.		TEM NO.	RE cc	110
	• D Q	various subjects of longer cerm interest which require the attention of the Council office on a recurring basis. Files include reports,	TRATIVE WORKING FILE	and memoranda arranged cally, other materials arranged by subject.	randa, reports, cor lutions, ordinances ls. Outgoing corre	on C role deve	ADMINISTRATIVE POLICY FILES. Documents reflecting the position		TITLE AND DESCRIPTION OF RECORD SERIES (•)	RECORDS DISPOSITION SCHEDOLE	
			2				2	V	DEPT. (1)	DIVISION CTILY	1
-			ω				ש		R.C. (•)	ļ į	
			υ				P		TOTAL (1)	DISTRICT 5	
								•	HEMAN TO 110	PAGE (4)	SCHED. DATE (1)

R-2846			۲	ŕ _t	~	APPOINTMENT CALENDARS. Schedules for appointments, meetings and other miscellaneous notations for the Councilmember. Arranged chronologically.	υ
197			១ ១ ១ ១ ១ ១	j			
			Destroy when ref- erence value	ı	Destroy when reference value ceases.	b. Duplicate	
			2		2	a. Original	,
N						reports, memoranda, correspondence, newspaper articles, resolutions. Arranged chronologically by subject.	5 · · ·
						ire Council atte t-term basis. F	
						- TRANSITORY. Documents retained to various subjects covering a	
				-		DMINISTRATIVE	•
		,	TOTAL (•)	R.C. (1)	DEPT. (1)	TITLE AND DESCRIPTION OF RECORD SERIES (*)	EM NO.
	REMARKS (10)	REM/		Ž	RETENTION		
	PAGE (1)	<u> </u>	1	I	- 1	CC-1871 (0-82)	O
	DATE (1)	SCHED.	DESTRECT 5	- 1	DEPARTMENT (1)	RECORDS DISPOSITION SCHEDULE	R

R	RECORDS DISPOSITION SCHEDULE			ר		SCHED.	DATE (1)
c	CC-1871 (0-82)	DIVISION	_COUNCIL _DISTRICI	TRICT 2		<u> </u>	PAGE (1)
		RETENTION	ION			A IVA II CI	BEMARKS (10)
EW NO	TITLE AND DESCRIPTION OF RECORD SERIES (1)) DEPT. (1)	R.C. (•)	TOTAL (•)			
•	1	2	ı	2			
	its requesting		-				3
	n, recommending posit			<i>:</i>			
	les, complain			• •			
	ertain problems, th						
	cilmembe			,			:
• • • • • • • • • • • • • • • • • • • •	congratulating the Councilmember						
	achievements.	-		- 10			-
	anged chronologically				•		-
	~						
	constituent.			:			
				•			
7	SSUE	2	ъ	ש			
·	rela		-				
	one on the		•				
	ems found in the Co						٠.
	district. Th						
	elationship		,				
	ouncilmember			,	- 1-		
٠	district issues.				,		
	ed by community						
	alphabeti			· · · · · · · · · · · · · · · · · · ·			
:							

R-284697

		Ceases.				
	<u> </u>	erence		ceases.		
	1.	ref	1	reference value	a. Duplicate	
)) †			chronologically thereunder.	
					d by type	
					nts or the elopment Bo	
p				•	\mathbf{r} outside agency \mathbf{r}	
9					for the City Council meetings,	
184					sup materials for agence	
i co	· :				member. Meeting r	
n engl			,		which document registative meetings	
					ETING FILES.	•
		needed.				. ; .
		Destroy when no	ı	Destroy when no longer needed.	a. Nonrecord	
					or declined, chronologically thereunder.	
		٠.			Arranged chr	
•					member to attend vari	•
		:			INVITATIONS. Requests extended to	· ·
. ·						· ·
HEMAHKS (10)		TOTAL (.)	R.C. (1)) DEPT. (1)	TITLE AND DESCRIPTION OF RECORD SERIES (1)	(a) NO.
			S N	RETENTION		
PAGE (4)				- 1		
NO.(z)		DISTRICT 5		DEPARTMENT (1)	RECORDS DISPOSITION SCHEDULE	, 2 0
\dashv						<i>"</i>

RECORDS DISPOSITION SCHEDULE

				•					۱
\mathcal{R}	RECORDS DISPOSITION SCHEDULE	DEPARTMENT (1)	Ξ				SCHED.	DATE (a)	
O	CC-1571 (6-82)		CITY COU	CIL DIS	CSTRICT 5				1
Ť		NOISIAIG					1	PAGE (-)	
			RETENTION	ION			MHM	REMARKS (10)	
EM NO.	TITLE AND DESCRIPTION OF RECORD SERIES (*)	•	DEPT. (7)	. H.C. (•)	TOTAL (•)				1
19							٠		
			F						
						•			
•	NEWSPAPER CLIPPINGS. Newspaper	٠.						·	
٠.	articles about the Councilmember,				٠		•		
	the Councilmember's district, or							•	
	various City issues of interest.					-			
	Arranged chronologically or by	÷							
	subject.	• • •				,	•		

Nonrecord

ceases. reference value Destroy when

value ceases erence vhen ref-)estroy

NEWS RELEASES

Statements of the position on one or

Councilmember

specific action(s)

News Release.

the issue or

issues News

the Councilmember's

position on

Releases reflect raised in the more

issues which may call for (a)

by the City on

policy issues and they may document the Councilmember's role in the

development of City policy.

Arranged chronologically.

284697

R	RECORDS DISPOSITION SCHEDULE	DEPARTMENT (1) CITY COUNCIL		DISTRICT 5	SC	SCHED. NO.(1)	DATE (1)
ç	CC-1571 (0-82)		•			1	PAGE (4)
		RETENTION	ION			REMA	REMARKS (10)
EM NO.	TITLE AND DESCRIPTION OF RECORD SERIES (*)	DEPT. (7)	. H.C. (1)	TOTAL (1)			
:	 						-
	OFFICE MANAGEMENT FILES. NECOLUS						ž
	the day-t				,		
	administration of the office.			7.			
	Files include travel vouchers,						
	travel expenditure receipts,						
	various invoices, Printing					٠.	
	Services Requisitions (PEA-1469),						
	Telephone Service Authorizations						
	Travel Expen		,				
	-1312), and Direct Paymer						
	. Com						
 	onnel			•		•	
	Co						• •
	tion. Arranged chronologically or						
	unarranged.					٠.	
					_		

Destroy when reference value ceases.

Destroy
when reference
value
ceases.

R-284697

DATE (1)

c R	RECORDS DISPOSITION SCHEDULE	DEPARTMENT (1) CITY COUNCIL	٠.	DISTRICT 5	PAGE (4)
		RETENTION	ION		BEMARKS (10)
TEM NO.	TITLE AND DESCRIPTION OF RECORD SERIES (1)	9 DEPT. (1)	R.C. (•)	TOTAL (*)	DEMAD 70 TE
(5)	0				
		4	J	<u>></u>	*It is not required.
ω.	LIPS. Cor		(t these
;	Council Offices about city				transferred to the
	nα				Records Center at the
	rm CM-8). Thes				ĸ
	documented on the				however, total reten-
-	יים ר קט				tion in both the
	_		 ,		office and the Records
	S in this				Center should not
	logs or indexes of four stres			• .	exceed four years.
	recerved. Arranged of the				
•	are::::::::::::::::::::::::::::::::::::				υ -
. 1	alphabetically by the name of the				Ω
	əze				Citizen s Assistance
	Ct,			1	
	alphabetically by name of the				
•	constituent thereunder.				

284697

groups in SPEECHES.

the City by the Council-

Talks made

to various

important City issues.

Arranged

of

chronologically.

of the Councilmember on a number

indicator of the policy positions

Speeches may be an important member on a variety of topics.

DEPARTMENT (1) CITY COUNCIL DISTRICT 5 DIVISION MENTS OF ECONOMIC INTEREST. Yearly with the City Clerk 721) who forwards them to tate Fair Political Practices ssion. The Statements report ouncilmember's financial ngs and investments. ged chronologically by year. a. Duplicate Destroy when reference value reference value publications from the City shewhere which are used for ence purposes. Contents budget, Council Policy Manual, istrative Regulations,
R.C.(1) TOTAL (1) - Destroy when reference value ceases.

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE	
CITY COUNCIL DISTRICT 5	PERSONNEL FILES - IND	IVIDUAL
		RETENTION PERICO
COPIES BY DEPT./SECTION :	COPY DESIGNATION	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 terminate

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):

- a. Transfer Group A records to receiving department.
- b. 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
Mosery	0	Mitcher Bear	- Cushe Ohl Saine Depulphizalloney
CC-1570 (6-82)	}		

R-284697

ORIGINA"	TING DEPARTM	ENT	RECORDS SERIES TITLE				
CITY	COUNCIL	DISTRICT 5	ADMINISTRATIV	/E POLIC	CY FILES		
					RE	ETENTION PERIOD	
	COPIES BY DEP	T./SECTION	COPY DESIGNAT	TION	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

CUTTE C MISSING

Cutte C MISSING

Control of 1821

Control of 1822

Control of 182

ecolus series no. s

RECORDS RETENTION EVALUATION/CITY OF SAN DIEGO

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			
CITY COUNCIL DISTRICT 5	ADMINISTRATIVE WORKI	NG FILES	- ROUTINE	
		RI	ETENTION PERIOR	D ·
COPIES BY DEPT./SECTION	COPY DESIGNATION	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:		DEPARTMENT HEAD		CITY ATTORNEY
Colon de	loe-	Mitcher Pkc	\	autil Menue
CC1570 (5:82)	0 _28	0697		Deputy City allorating

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			
CITY COUNCIL DISTRICT 5	ADMINISTRATIVE WORK	ING FILES	- TRANSIT	ORY
		R	ETENTION PERIO	D
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	-	2
	DUPLICATE	Destroy	when refe	rence
		value ce	eases.	

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 <u>Government Code</u> section 34090(d); for duplicates, Government Code section 34090.7.

APPROVED BY:							
CITY CLERK	-	DEPARTMENT H	HEAD		CITY ATT	,	
Lann.		$ \gamma_{I}\rangle$	/	J	Lusti	26 112	uli
(Maxon	Dell	1/1/1/0	Leu K		· 161 .//	. //\/ ///	Corney
		0000	1/2		Office	i cay ou	
CC-1570 (6-82)	1 17.28	34697		/		\mathcal{J}	\mathcal{U}_{i}

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			•
CITY COUNCIL DISTRICT 5	APPOINTMENT CALENDAR	S		•
	•	R	ETENTION PERIO	D
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	P	<u>P</u>
				`

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
		autu C Mrsuu
	11,4	1 21 1
1 AKUSEOU KON	- Maleken Kec	Deputy City allorsey
1 March 1	100000	1 27 7
	284697	
CC-1570 (6-82)	CAUTIOUS	(/

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			
CITY COUNCIL DISTRICT 5	CORRESPONDENCE - ROU	JTINE		
		RI	ETENTION PERIO	<u> </u>
COPIES BY DEPT /SECTION	COPY DESIGNATION	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
~~~~	121.	Oustil CM June
Cott Stade	JOYA WATER A	Deputy atyllorney
SK S	1 milete 190	Define carette may
CC-1570 (6-82)	0-284697	

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			
CITY COUNCIL DISTRICT 5	COUNCIL DISTRICT ISS	UES FILES	5	
		RE	TENTION PERIO	)
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	P	P
		· .		<u> </u>
		·		
				•

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
Dello Dellom	Within Re	Deputy City titlorney
CC-1570 (6-82)	284697	

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE		•	
CITY COUNCIL DISTRICT 5	INVITATIONS		1 4 1 <b>3</b>	· · .
		R	ETENTION PERIO	D
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	NONRECORD	Destroy	when no 1	onger_
		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

CITY ATT

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			
CITY COUNCIL DISTRICT 5	LEGISLATIVE MEETING FILES			
		RETENTION PERIOD		
COPIES BY DEPT./SECTION	COPY DESIGNATION	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 PROJULLE
ARDED DO	1 Weedler for	Diputy Cety alloway
CC-1570 (6-82)	0-284697 ·	

DRIGINATING DEPARTMENT	RECORDS SERIES TITLE			
CITY COUNCIL DISTRICT 5	NEWSPAPER CLIPPINGS			
		RI	ETENTION PERIO	)
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	NONRECORD		when refe	rence
CIII COONCIL -		value ce	ases.	· · ·
٥				
			1	

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

CUSTIC MYCILLE

Alputy City attorney

Alputy City attorney

CC-1570 (6-82)

_284697

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			
CITY COUNCIL DISTRICT 5	NEWS RELEASES			
		·		
		RI	ETENTION PERIO	D
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	P	Р

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
$\sim \sim \sim \sim \sim \sim$		austic C Mourie
1 ( M. ( ) SOUNDA	1 Willes Re	Deputy City allorney
	1 10000	require against
CC-1570 (6-82)	0_284697	

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE				
CITY COUNCIL DISTRICT 5	OFFICE MANAGEMENT FILES				
		R	ETENTION PERIO	0	
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL	
CITY COUNCIL DISTRICT 5	DUPLICATE	Destroy	when refe	rence	
		value ce	ases.		

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	4
MAC AND AN	<u> </u>	71-12	Custe MS	Duni
MAN	DW.	Mulchen Kr	1 ^ //	altorener
	/ · · · · · ·		signing conf	un xing
CC-1570 (6-82)	V2 - 6	284697		

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE	•		
CITY COUNCIL DISTRICT 5	PERSONNEL FILES - INDIVI	DUAL		·
		RE	TENTIONPERIO	)
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	CURRENT EMPLOYEES	Retain al	l records in	office.
CITY COUNCIL DIBINIO	TRANSFERRING EMPLOYEES	See * bel	ow.	
	TERMINATED EMPLOYEES	Destrov a	ll records	two (2)
		years aft	er emplovee	terminate
		<u> </u>		L

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, bilingual 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  $\underline{\text{Government Code}}$  Section 34090(d).

APPROVED BY:		
CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
100000	71LT Pa	lysie C/1/ sille
THE WAY TO THE	y Mitchen Jen	Deputy lety allogency
	0 284697	The state of the s
CC-1570 (6-82)	(CLOTTOE'S	

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			
CITY COUNCIL DISTRICT 5	ROUTE SLIPS			•
		<del></del>		
		RE	TENTION PERIOD	, 
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	1*	3	. 4
				<u> </u>
				· · · .

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
	$\gamma_{I}$	autic yn suil
MINDE ON.	trus Mittotal Ren	Orant Pet allana
C C C C C C C C C C C C C C C C C C C	Out marines 17	Deputy City allany
CC-1570 (6-82)	0-284697	

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			•
CITY COUNCIL DISTRICT 5	SPEECHES			
		RE	TENTION PERIOR	
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	ORIGINAL	2	P	P
			·	
				<u> </u>
				· · · · · · · · · · · · · · · · · · ·

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
	11 - 4 - 1 -	_	Custil Moule
1 xxx at a contract	1 Milebell 195		Diguty aty allaring
	( ·		
CC-1570 (6-82)	R. 264697		

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			
CITY COUNCIL DISTRICT 5	STATEMENTS OF ECONOM	IC INTER	EST	
		RETENTION PERIOD		
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	DUPLICATE	Destroy	when refe	rence
	3	value c	ases.	
				·
				<u> </u>

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.

C-284697

APPROVED BY:		
CITY CLERK	DEPARTMENT HEAD	CITY ATTORNEY
$\sim \sim \sim$		Cristil C Malle
All MHOWER	- Netetien Re	Deputy Cety allorney
W. Son	70	- proprietarios /

CC-1570 (6-82)

ORIGINATING DEPARTMENT	RECORDS SERIES TITLE			•
CITY COUNCIL DISTRICT 5	TECHNICAL REFERENCE	MATERIALS	5	
		R	ETENTION PERIO	
COPIES BY DEPT./SECTION	COPY DESIGNATION	DEPARTMENT	REC. CENTER	TOTAL
CITY COUNCIL DISTRICT 5	DUPLICATE	Destroy	when refe	rence
		value ce	ases.	

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.

C-284697

APPROVED BY:		
CITY CLERK	DEPARTMENT HEAD CITY ATTORNEY	
Karreno.	The Control Mille	
miles le la	. Metchen & Deput Cet, allow	
	· () (Region) (CC) continue	<del>/</del>
CC-1570 (6-82)		′