

## RECORDS RETENTION SCHEDULE EXAMPLE

CATEGORY	RECORD DESCRIPTION	RETENTION
<b><i>Board, Committee &amp; Working Group Meetings</i></b>	Agendas, Reports & Meeting Minutes	Permanent
	JPA, Bylaws and other governing documents	Permanent
	Public Hearing Notices	Permanent
	Ordinances and Resolutions	Permanent
	Staff Reports	2
	Tapes from Meetings	90 days
<b><i>Conflict of Interest</i></b>	Conflict of Interest Forms (Form 700)	7
	Conflict of Interest Policies and Procedures	Permanent
	Formal Inquiries and Responses	4
<b><i>Contracts</i></b>	Protests and Responses	Active + 5
<b><i>Correspondence</i></b>	General Correspondence (Letters and Email)	2
	Substantive and Necessary Correspondence (including Email) About a Specific Ongoing Project	Active + 2
	Public Policy Correspondence	Permanent
<b><i>Elections</i></b>	Election Case Files	7
	Election Planning Materials and Reference	2
<b><i>Environmental</i></b>	EIR/EIS Administrative Drafts and other documents part of EIR/EIS administrative record prepared by SANDAG as lead agency	Active + 1
	Environmental Impact Reports (EIR/EIS) and Initial Studies prepared by SANDAG as lead agency	Permanent
<b><i>General Administration</i></b>	Directives, Policies & Procedures, and Handbooks	Permanent
	Necessary Staff Working Files	3
	Records Kept for Informational or Reference Purposes Only	Active

	Staff Meeting Notices & Agendas	2
<b>Insurance</b>	Claims Against RTPA	Active + 5
<b>Language Assistance Program</b>	Program Policy and Procedure Documents	Permanent
	Translated Significant RTPA Documents	Permanent
	Translated Non-Significant RTPA Documents	2 to 3
<b>Legal and Legislation</b>	Board Actions	Permanent
	Claims Settlement Agreements	Active +10
	Failed legislation (Back-up)	2
	FPPC Documentation (other than Form 700)	5
	Legal Opinions	Permanent
	Legislation Pending	2
	Lobbyist Correspondence	3
	Litigation Files	Active + 2
	Public Records Requests	2
	Quarterly Lobbying Reports & Registration Materials	Permanent
	Successfully obtained legislation (Back-up)	10
<b>Public Relations and Information</b>	Advertising and Graphics	2
	Brochures, Reports, etc.	2
	Lectures and Speeches (Miscellaneous)	2
	Newsletters	2
	Press Releases	2
	Public Ceremonies and Event Preparation	2
	Public Records Requests	2
<b>Safety</b>	Records of Safety Training	3
<b>Transportation</b>	TDM (Rideshare, Vanpool, Guaranteed Ride Home)	10

**RESPONSIBLE OFFICE****COMMENTS**

Clerk of the Board/Comm.  
Clerk of the Board/Comm.  
Clerk of the Board/Comm.  
Clerk of the Board/Comm.  
Clerk of the Board/Comm.  
Clerk of the Board/Comm.

5 years if repealed or found invalid

Clerk of the Board/Comm.  
Executive Director  
Executive Director

Executive Director

Active until project complete

Employee sending or receiving  
original  
Employee sending or receiving  
original  
Employee sending or receiving  
original

Except CC: version of correspondence  
Active until project complete; Except CC:  
version of correspondence

Except CC: version of correspondence

Executive Director  
Executive Director

Working papers and records related to  
support of / opposition to statewide  
measures

Responsible Project Manager

Active until all mitigation measures  
complete

Responsible Project Manager

Executive Director  
Staff Utilizing Record  
Staff Utilizing Record

supervisors and Managers

Executive Director                      Active until litigation complete

Planning Director  
Planning Director                      Policy, Board Minutes, etc.  
Planning Director                      Refer to relevant record category

Executive Assistant  
Executive Director                      Active until project complete

Executive Director  
Executive Director  
Executive Director  
Executive Director  
Executive Director  
Executive Director                      Contract salary and financial reporting  
Executive Director                      information

Executive Director  
Executive Director                      Active until litigation complete  
Executive Director

Executive Director  
Executive Director  
Executive Director

Executive Director  
Executive Director  
Executive Director  
Executive Director  
Executive Director  
Executive Director  
Executive Director  
Executive Director

Director of Finance and Admin.

Associate Transportation  
Planner

## **LEGAL CITATION**

GC 34090, GC 60201

GC 60201  
GC 34090  
GC 34090.7

GC §81009  
FPPC

CCP 337.2; B&P 7042.5

GC 81009

GC 34090; CEQA  
Guidelines

GC 34090; CEQA  
Guidelines

GC 81009

GC 60201

GC 81009

GC 34090

GC 34090