



1. The Policy defines the types of records maintained by SBCERA.
2. Government Code section 34090.5 authorizes the conversion of hard copy materials and records onto other electronic mediums. Physical records are required to be digitized (i.e. converted into an electronic file) and then retained or purged in accordance with the Records Retention Schedule.
3. Records in electronic form are retained permanently or in accordance with the retention schedule.
4. Electronic reproduction of records shall be deemed to be an “original” of the paper records.
5. Electronic communications are retained and preserved for two years.
6. Emails deemed transitory are an exception to the two-year retention requirement. If such email is transitory, then the retention period is 90 days from inception date and removed to “Trash” to be subsequently deleted 30 days thereafter.
7. Unless a record is deemed an Official Record, preliminary drafts and notes may be destroyed if they are no longer needed and there is no legal or policy requirement that they be retained.

The Policy provides a 12-month period for staff to comply with the requirements set forth in the Policy and Records Retention Schedule. Thereafter, annually, each Department will be responsible for reviewing all records in its custody, and retain or purge such records in accordance with the Policy.

Staff will continue to monitor and review changes in state laws that pertain to local government records retention, and update changes to the Records Retention Schedule.

**BUDGET IMPACT:**

None.

**STRATEGIC PLANNING GOAL/OBJECTIVE:**

Operational Excellence & Efficiency

**STAFF CONTACT:**

Barbara Hannah

**ATTACHMENTS:**

- Exhibit A: [Proposed] Administration Policy No. 005 (Records Retention Policy), Issue 3.0  
Exhibit B: Administration Policy No. 005 (Records Retention Policy), Issue 2.0, Effective 04/07/2011  
Exhibit C: Appendix Records Retention Policy Schedule