



FAIRVIEW

FIRE PROTECTION DISTRICT

POLICY	NUMBER:108.1
RECORDS RETENTION POLICY	EFFECTIVE: 1/28/2020 PAGE 1 OF 3 PAGES

I Purpose:

The purpose of this policy is to provide guidance regarding the retention, storage, and disposition of District records in accordance with legal requirements. “Records” means all records, maps, books, papers, and documents of a fire protection district required by law to be prepared or retained as necessary or convenient to the discharge of official duty.

II Policy:

It shall be the policy of the District to follow all appropriate laws pertaining to retention and destruction of records. District records shall be created, maintained, and disposed of in accordance with the provisions of this policy and in no other manner. In accordance with California Government Code, Sections 6200 and 6201, any District officer or employee who is guilty of stealing, willfully destroying, mutilating, defacing, altering or falsifying, removing or secreting the whole or any part of a public record, or permits any other person to do so, is subject to punishment by imprisonment or fines.

III Procedure

RECORD RETENTION SCHEDULE:

- a) The purpose of these retention schedules is to identify how long records should be maintained within a department, when they should be sent to inactive records storage, and when they should be destroyed or sent for permanent retention.
- b) Per District policy, there shall be an annual review of records in January. At that time, the General Manager will determine whether records that are no longer being used are

permanent, optional or disposable. Records that are still being used will not be classified until their use has ceased.

c) Permanent Records. These records should be held indefinitely unless noted. Unless otherwise noted, however, the hard copies may be destroyed if stored electronically:

1. Board meeting minutes.
2. Meeting Agendas and Packets.
3. Resolutions/Ordinances.
4. Policies & procedures.
5. Budgets.
6. Payroll. Originals should be kept for seven years and then may be stored electronically.
7. Various reports to the State. Originals should be kept for seven years and then may be stored electronically.
8. Annual Audits. Originals should be kept for seven years and then may be stored electronically.
9. Purchases/Contracts. Retained for life of contract plus 7 years.
10. Any unaccepted bid or proposal for the construction or installation of any building, structure or other public work should be kept for 2 years.
11. Insurance policies, certificates. Originals should be kept for seven years and then may be stored electronically.
12. Election records. Originals should be kept for 2 years and then stored electronically.
13. COI form 700s. Originals should be kept for 7 years and then stored electronically.

d) Optional Records. Any records considered temporarily worth keeping, but which are not one of the permanent records identified above may be classified as optional records and shall be retained until reclassified as disposable records. If classification of the prior year records has not been made before January 1, all records of the prior year may be classified as optional records pending further review and classification within one year.

DESTRUCTION OF DISPOSABLE RECORDS: Records not identified as permanent or optional, will be classified as disposable. Disposable records shall be destroyed during the third fiscal year after the fiscal year in which the records originated. In addition, disposable records shall not be destroyed until after the third fiscal year following the completion of any legally required audit or the retention period required by any agency other than the State of California, whichever is later.

- a) All District records should be destroyed in the normal course of business in accordance with the approved records retention schedule.
- b) The District is subject to Federal, State, and local government requirements which pertain to the destruction of records.
- c) In addition to specific California codes permitting destruction of records, the District is also subject to the general destruction provisions of the California Government Code, Sections 60200, 60201, and 60203. Under these codes, the board of a district may authorize the destruction of such records.
- d) Certain specified records of the courts included on retention schedules can only be destroyed upon order of the court.
- e) Records required for ongoing or imminent litigation, audits, claims or other disputes should not be destroyed until these matters are resolved
- f) The General Manager will be responsible for the proper destruction of records stored within District facilities.
 - 1) Proper disposition of records includes the recycling of non-confidential records, the shredding of confidential records, or the transfer of obsolete historical records for preservation, as appropriate.

Board President Signature:



Date:

01/27/20