



AGENCY: City Council
MEETING DATE: September 24, 2018
DEPARTMENT: City Clerk/Admin Services
PRESENTED BY: J. Lemos
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AGENDA ITEM SUMMARY

TITLE:

Receive Report and Consider Adoption of City Council Resolution Adopting a Records Retention Schedule, Authorizing Destruction of Certain City Records, and Rescinding Prior Resolution 3806-2015

ISSUE:

The City is upgrading its records management program, including its records retention policies. The adoption of this retention schedule will result in efficiency gains and cost savings.

ANALYSIS:

The City of Fort Bragg selected Gladwell Governmental Services, Inc., an expert in local government records, to upgrade its records management program. An upgrade in the existing program was necessary to reduce current and future records storage costs, eliminate duplication of effort, increase efficiency and take advantage of current technology and changes in law.

On August 21 and 22, 2018, Diane Gladwell of Gladwell Governmental Services met with every City department head and all staff responsible for maintaining records for the City to develop a schedule of retention for the documents handled by each department. The goal was to produce one comprehensive schedule, divided by department, that would be easy to use and provide guidelines for the length of time records needed to be retained.

The upgrade of the current records management systems is driven by many factors, including:

- Limited space in City facilities – some departments reported they are out of space to store their records
- Different departments are filing and storing copies of the same records
- Fort Bragg produces and manages many permanent records
- Escalating records storage expenses
- Technology advancements
- Changes in law

The purpose of the program is to apply efficient and economical methods to the creation, utilization, maintenance, retention, preservation and disposal of all records managed by the City.

The retention periods are in compliance with all laws and are standard business practice for California cities. The Retention Schedule establishes the **minimum** period of retention for documents. The City reserves the right to retain public records and documents in excess of the minimum legal requirements when it is found that it is in the best interests of the City to do so because of operational, financial or historical needs.

The new retention schedules were written interactively with representatives from all departments participating in the project. They provide clear, specific records descriptions and retention periods, and apply current law and technology to the management of Fort Bragg's records. By identifying

which department is responsible for maintaining the original record, and by establishing clear retention periods for different categories of records, Fort Bragg will realize significant savings in labor and storage costs, free up filing cabinet and office space, and realize operational efficiencies.

It is standard business practice for California cities to authorize the routine destruction of records that have exceeded their adopted retention period, upon the request of the Department Head and with the consent in writing of the City Clerk and City Attorney, which is provided in Section 2 of the resolution.

It is also standard business practice for California cities to authorize updates to the schedule without further action of the City Council, which is provided in Section 3 of the resolution.

RECOMMENDED ACTION:

Adopt the Resolution Adopting a Records Retention Schedule, Authorize the Destruction of Certain City Records, and Rescind Prior Resolution 3806-2015.

ALTERNATIVE ACTION(S):

Do not adopt the Resolution and provide additional direction to staff.

FISCAL IMPACT:

Fort Bragg will realize significant savings both in labor and storage expenses; including the avoidance of future storage and/or construction costs.

CONSISTENCY:

The retention periods in the proposed Retention Schedule are consistent with California Government Code Section 34090 et seq.

IMPLEMENTATION/TIMEFRAMES:

The new Records Retention Schedule will be implemented immediately upon adoption by the Council.

ATTACHMENTS:

1. Resolution re Retention Schedule
2. Exhibit A to Resolution – Fort Bragg Retention Schedule
3. Records Retention Schedule Legend
4. How To Use Retention Schedules

NOTIFICATION:

None.