

Chester Public Utility District Policy Manual

Section 2000

Administration

Section 2100 Financial Management

POLICY TITLE: Records Retention

POLICY NUMBER: 2145

2145.1 The purpose of this policy is to: provide guidelines to staff regarding the retention or disposal of District records; provide for the identification, maintenance, safeguarding, and disposal of records in the normal course of business; ensure prompt and accurate retrieval of records; and, ensure compliance with legal and regulatory requirements pursuant to the provisions of Government Code §§ 60200 through 60204, and the guidelines prepared by the State Controller's office and the Controller's Advisory Committee for Special Districts.

2145.1.2 The General Manager is authorized by the Board of Directors to interpret and implement this policy.

2145.1.3 Digital documents are an acceptable form of records. If original copies are paper, they must also be retained. Digital records will be retained as if they were paper documents. Therefore, any electronic files, including emails that fall into one of the document types in this Policy will be maintained for the appropriate amount of time.

2145.1.4 All records will be kept for a minimum of 7 years, unless destruction is required as per the provisions of Government Code §§ 60200 through 60204, and the guidelines prepared by the State Controller's office and the Controller's Advisory Committee for Special Districts.

2145.1.5 Records of proceedings for the authorization of long-term debt, bonds, warrants, loans, etc., after issuance or execution may be destroyed if digitally duplicated. Terms and conditions of bonds, warrants, and other long-term agreements should be retained until final payment and thereafter may be destroyed in less than 10 years if digitally duplicated.

2145.1.6 Contracts should be retained for their lives plus seven years.

2145.1.7 Board packets and their entirety, will be kept indefinitely

2145.1.8 Audio recordings will be kept indefinitely

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2145.1.9 In no instance shall records, papers, or documents be destroyed where there is a continuing need for such records for such matters as pending litigation, special projects, system design and historical documents, etc.

2145.1.10 Property records, such as documents of title, shall be kept until the property is transferred or otherwise no longer owned by the District.

2145.1.11 Pending litigation, special projects, construction records, bids, correspondence, change orders, system designs, and Vital and important historical records will be kept indefinitely.

2145.1.12 All payroll and personnel records will be retained per government code §§ 60200 through 60204. Payroll includes accident reports, injury claims and settlements, medical histories, injury frequency charts, applications, changes and terminations of employees, insurance records of employees, timecards, classification specifications (job descriptions), performance evaluation forms, earning records and summaries, retirements.

2145.1.13 Duplicate records, papers, and documents may be destroyed at any time without Board authorization, advice of the General Counsel, or copying to photographic or electronic media.

2145.1.14 Confidentiality. The District is committed to ensuring the security and confidentiality of all records within its custody or control containing personal, confidential, or proprietary information. When such records are due to be destroyed under this Policy, they will be shredded, erased, or otherwise modified or destroyed to make them unreadable or undecipherable through any means.